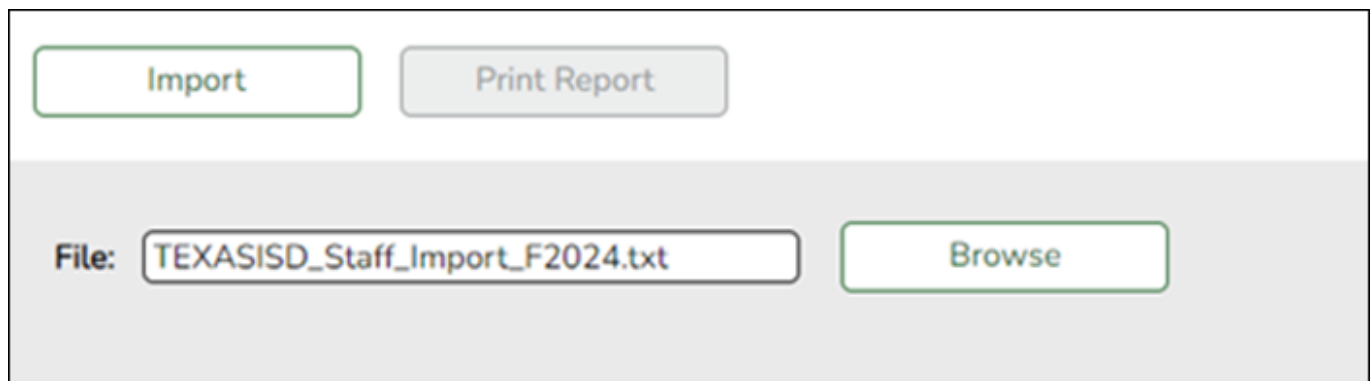# fall_extract_staff

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If you will be manually entering the staff responsibility data on the ASCENDER State Reporting maintenance pages, skip the following steps.

Import Staff Data (for Student-only Districts)

Districts that do not use ASCENDER Business applications can import basic staff demographic data to be used for the TSDS Staff Interchange records (i.e., to join the unique staff ID with a teacher/staff record). The import adds "non-employee" data to HR that will be read by the extract, along with data from ASCENDER Grade Reporting. **This utility must be run before running the staff extract.**

State Reporting > Utilities > Import Staff File

File layout

The utility accepts data from a comma-delimited text or CSV file (e.g., provided by a third-party business application vendor) and inserts the records into HR tables which allows you to maintain this data in the ASCENDER TSDS application.

The values must be inserted in this order:

Field	Validation
Unique staff ID	Must be ten digits.
Staff ID/SSN	Must be nine digits. Required. First character must be S or 0-8. First three characters must not be 000. Middle characters (3rd-4th digit) must not be 00. Last four characters must not be 0000. First seven characters must not be the same.
Last Name	Required
First Name	Required
Middle Name	Required
Gender	One character (M or F)

Field	Validation
Legal Generation	One character 1 = Jr 2 = Sr 3 = II 4 = III 5 = IV 6 = V 7 = VI 8 = VII 9 = VIII A = I B = IX C = X
DOB	Required; format YYYYMMDD
Hispanic Ethnicity	One character (Y or N)
Race American	One character (Y or N) At least one race indicator is required.
Race Asian	One character (Y or N)
Race Black	One character (Y or N)
Race Native Hawaiian Pacific Islander	One character (Y or N)
Race White	One character (Y or N)
Highest Degree	One character 0 = No Bachelor's 1 = Bachelor's 2 = Master's 3 = Doctorate
Prior Teach Experience	Two characters, values 0-99
Original Emp Date	Format YYYYMMDD
Term Date	Format YYYYMMDD

Example:

0133884198,422514579,Bacon,Jason,Donald,M,1,19801023,N,Y,N,N,N,Y,1,10,20150801,20200101
0133884199,422514563,Hannover,Renee,Keen,F,1,19601024,N,Y,N,N,N,Y,1,12,20150801,20200104
0133884189,422514549,Nimitz,Clark,Mason,M,1,19701022,N,Y,N,N,N,Y,1,15,20150801,20200105
0133884179,422514769,Hernandez,Joe,Lee,M,1,19811028,N,Y,N,N,N,Y,1,10,20150801,20200106

File	Click **Browse** to locate and select the file to import.

❑ Click **Import**.

The results of the import are displayed, including a count of records with errors, and total records read, updated, and imported.

Print Report	Print the error report. If errors occurred, the line number in the file will correspond to the record that caused the error. **Review the report using the following buttons**: Click [First] to go to the first page of the report. Click ◀ to go back one page. Click ▶ to go forward one page. Click [Last] to go to the last page of the report. **The report can be viewed and saved in various file formats**. Click 🅰 to save and print the report in PDF format. Click 🅰 to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included. Click ❎ to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Before Extracting Staff Data:

❑ Verify and correct data in the master schedule as described in the **Verify Master Schedule Data** section of this guide.

❑ Ensure that all inactive employees have a termination date entered **(Termination - Date** and **Reason** fields on *Human Resources > Maintenance > Staff Job/Pay Data > Employment Info*). If the **Reason** field is blank, the employee is not extracted.

❑ Ensure that all Type 3 (hourly) employees have an estimated annual salary (**Payroll > Maintenance > Staff Job/Pay Data > Job Info**) and distribution (**Payroll > Maintenance > Staff Job/Pay Data > Distribution**).

The fall Staff Extract page will extract data for the *StaffAssociationExtension* interchange, including staff demographic, payroll accounting, and responsibility data from the master schedule and the Human Resources (HR) application. You can extract subsets of data, multiple times. You can extract from HR only, master schedule only, or both at the same time.

Districts with contracted instructional staff serving as classroom teachers (i.e., PEIMS Type 3) will also enter data on *ASCENDER District Administration > Maintenance > Non-Employee*.

> **NOTE:**
>
> When extracting from the master schedule, class ID is set to the course number (four to eight digits) + two-digit section number + one-digit semester number + padding with zeros.

- Class ID is only repeated if more that one instructor is assigned to the same course-section (e.g., assistant or support teacher).

- If **Class Type** is blank in the district master schedule, the extract will use 01 - Regular.

Monthly minutes are determined as follows:

- If **Time Begin** and **Time End** on *Grade Reporting > Maintenance > Master Schedule > Campus Schedule > Section* contain values, monthly minutes are calculated from the begin and end times, days of week, and weeks of month code.

- If **Time Begin** and **Time End** are blank, monthly minutes are set to the value in the *Campus/Service ID* crosswalk table.

- If **Time Begin** and **Time End** are blank and the *Campus/Service ID* crosswalk table does not exist, the monthly minutes are set to the value in the *Campus/Period* crosswalk table.

- If **Time Begin** and **Time End** are blank and neither the *Campus/Service ID* crosswalk table nor the *Campus/Period* crosswalk table exist, an error message is displayed.

- See the Verify Master Schedule Data section of this guide for more information.

If a district has responsibility data in both HR and the master schedule, and the options to extract from both sources are selected, the following occurs:

- Existing staff responsibility records in TSDS are deleted (unless you selected the option to update class counts only).

- Staff responsibility records are extracted from the master schedule.

- Staff responsibility records are extracted from Human Resources. Only new records are added. If a record with the same key already exists in TSDS, the record from HR is not written, an error is displayed the summary report for the Human Resources record.

Extract staff data:

State Reporting > Extracts > Fall > Staff

| **Ending School Year** | (Display only) The submission year as entered in the **Submission Year** field on State Reporting > Options is displayed. |
| **PEIMS Fall As-of Date** | (Display only) The fall as-of date is displayed, as entered in the **As-of Date** field on State Reporting > Options. |

☐ Under **Demographic Data**:

| **Staff Demo Records from HR** | This option is only displayed if you have access to Personnel.

Select to delete all existing staff data and extract demographic data from Personnel. If selected, all existing staff records are deleted from the following tables: Staff Demo and Experience, Payroll, Classroom Responsibilities, and Nonclassroom Responsibilities.

• Staff records with pay type 1 are extracted.

• Staff records with pay type 2 or 3 are extracted if the employee status is 1 - active professional, 2 - active auxiliary per, 3 - retired, or 8 - temporary.

• Staff records with pay type 4 are extracted if the employee status is A - long term substitute and the TRS Member Position is 02.

This option may only need to be selected the first time you extract data, unless changes in Personnel have occurred since the last time you extracted data. |

❑ Under **Responsibilities**:

Extract from Grade Reporting	These option is only available if you have access to ASCENDER Grade Reporting.	
	Classroom Responsibilities from Master Schedule	Select to delete all existing classroom responsibility records in State Reporting and extract records from the master schedule. The role ID and population served data is extracted from the campus section records. If these do not exist at the campus level, they are extracted from the district records. If selected, you cannot select **Retain Classroom Responsibility Records**; you must select one or the other.
	Update Class Counts from Master Schedule	(Optional) Select to update the number of students in the classroom responsibility records for the teacher of record (i.e., class role=01) according to the number of students enrolled in the section on the fall snapshot date. For teachers with class role 02 (i.e., assistant teacher) or 03 (i.e., support teacher), the number of students is set to 0.
	Retain Classroom Responsibility Records	Select to re-extract demographic data without deleting and re-extracting classroom responsibility data. A district would select this option if it has extracted responsibility records from the master schedule, and the records are ready to submit to TEA, but the district needs to re-extract staff data from HR. This option is only available if you have access to the HR application. Select this option if Staff Responsibilities records have been extracted from either HR or Grade Reporting. Select this option if Staff Responsibilities records are not extracted from both HR and Grade Reporting at the same time. If you do not select this option, previously extracted records will be deleted. If selected, you cannot select **Classroom Responsibilities from Master Schedule**; you must select one or the other.
	Use Max Seats if No Students Enrolled	(Optional) Select to extract the maximum number of seats on the section record if no students are enrolled in the section. This field is used by campuses that create responsibility records from the master schedule, but do not assign schedules to students. Leave blank if you do not want to create responsibility records for sections with no students enrolled.

Extract from Personnel	This data is extracted from Personnel for both Student and Business users. These options are only displayed if you have access to ASCENDER Personnel. Nonclassroom responsibilities data should be entered in Personnel. If the district does not use the master schedule to create classroom responsibilities data, the classroom responsibilities data should also be entered in Personnel.	
	Non-Classroom Responsibilities	Select to delete all existing non-classroom responsibility data in State Reporting and extract data from Personnel.
	Classroom Responsibilities	Select to extract classroom responsibilities from Personnel. If selected, records are only added to the frozen records; existing responsibilities are not deleted or updated, unless: **Staff Demographic Records from Personnel** is selected and **Retain Classroom Responsibility Records** is not selected, or **Classroom Responsibilities from Master Schedule** is selected. Only role IDs with instructional responsibilities (002, 007, 015, 016, 017, 018, 021, 026, 032, 033, 036, 047, and 087 (e.g., instructional aides, speech therapists, etc)) are extracted. You must select this option if any instructional responsibilities are entered in Personnel.

❑ Under **Payroll Data**:

This section is only available if you have access to the ASCENDER Business system. To use the crosswalk tables, the tables must be built prior to extracting data.

Fiscal Year	Select the ending year of the fiscal year that you are reporting. For example, for the 2023-2024 school year, select 4.
Payroll Records	Select to delete all existing payroll records and extract records from Payroll.
Payroll Freq	Select the payroll frequency to include in the extract. Only frequencies you have access to are listed.
Include Acct Type 'S' Distrib	Select to extract supplemental distributions (account type S).

❑ Under **Crosswalks**, select any crosswalk tables you are using. The crosswalk tables must be built prior to running the extract.

Use 80 for Blank Activity	Select to change the payroll activity code to 80 for all payroll distribution records whose activity codes are blank.
Use 80 for Largest Activity	Select to change the payroll activity code to 80 for the employee's largest or only payroll distribution record.
Crosswalk 049	Select to omit a specific fund from the fall submission.
Crosswalk 045	Select to convert a specific fund/subobject combination to a program code.
Crosswalk 046	Select to convert one fund code to another fund code.
Crosswalk 047	Select to convert one object code to another object code.

Crosswalk 048	Select to convert one function code to another function code.
Crosswalk 055	Select to convert a specific fund/function/subobject combination to a program code.
Crosswalk 056	Select to convert a specific fund code to a program code.
Crosswalk 069	Select to convert a specific fund/program combination to a program code.
Crosswalk 040	Select to convert one organization code to another organization code.
Replace 00 in 6XXX with 99	Select to replace program intent codes 00 in 6XXX with 99, when the function code is not 11.

❏ Click **Run** to extract the selected records.

A message is displayed indicating that the extract is complete, and the **Print** button is enabled.

❏ Click **Print** to print the report.

The Print Options window opens allowing you to select a report.

❏ Select a report and click **OK**. The report opens in a new tab/window.

- **Summary** report - Lists errors by campus then employee/teacher ID.
- **Demo** report - Lists staff alphabetically with demo and experience data.
- **Payroll** report - Lists instructors by staff ID with activity code, account code, and amount.
- **Responsibility** report - Lists staff by ID with responsibility records.

❏ Correct any errors. Errors are usually caused by errors in the crosswalk, teacher file, or master schedule.

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