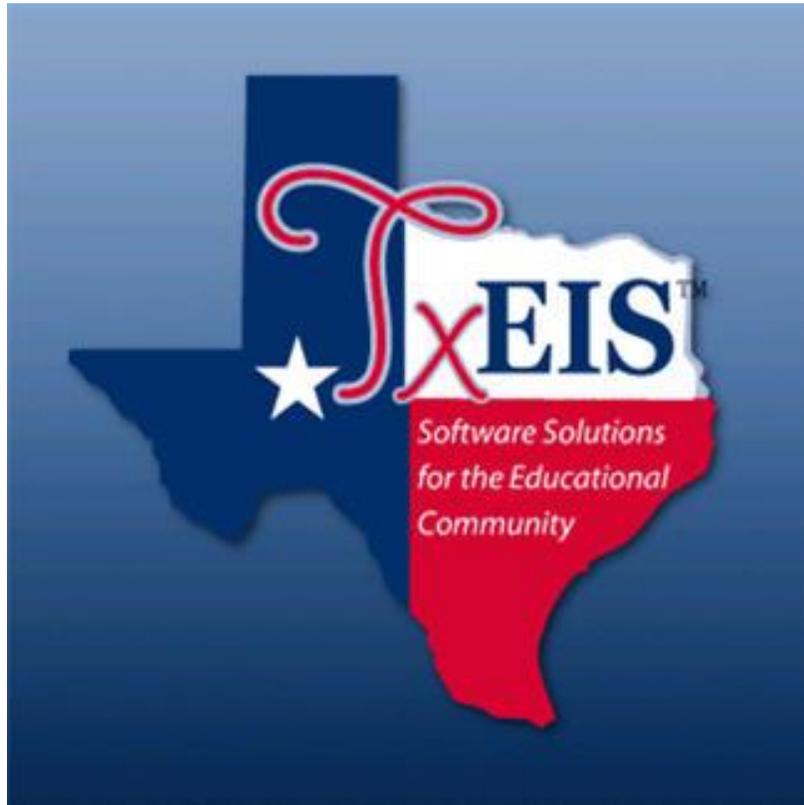


Service Records Checklist

2017-2018 School Year



Presented by ESC, Region 14

2018

Complete Service Records after June Payroll but before rolling July employees from Next Year to Current.

TxEIS Service Records Checklist

TxEIS will retain data on multiple years of service and accumulated state leave(s.) The Extract Teacher Service Record page is typically used in June to extract stored employee data and create a service record. The service record detail can then be accessed by school year from **HR > Maintenance > Staff Demo > Service Record tab**. When an employee leaves the district, a service record can easily be printed, signed, and sent with the employee or forwarded to the employing district.

Warning: Service records must be extracted before new contract information is entered in Current Payroll or rolled in from Next Year Payroll and prior to updating the Years' Experience fields in **Maintenance > Staff Job/Pay Data > Employment Info tab**. It is recommended that service records be extracted for ALL employees after June payrolls have been completed. If all leave for the current year has not been posted, the option "Update Leave Only" on the service record extract screen may be used after leave is posted in July and August for those employees.

_____ **1. Verify the State Leave codes.** From **Tables > District HR Options table**, verify the codes used by your district for the old State Sick Leave program and the Current State Personal Leave program are indicated.

The screenshot displays the 'District HR Options' configuration page in the TxEIS system. The page includes a navigation bar with 'Tables', 'Maintenance', 'Payroll Processing', 'Inquiry', 'Next Year', 'Self-Service', 'Utilities', and 'Reports'. The main content area is titled 'HR Options' and contains several sections of form fields:

- General Information:** TRS District ID (1099), Federal ID Number (EIN) (75-6002353), Payroll Clearing Fund/Year (163/8), TWC District ID (999911790), Use Direct Deposit (E - Electronic Funds Transfer), TRS Cost Education Index (1.0500), Distributions Built By Amt or % (P - Percentage), and Apply Leave Used or Earned First (E - Earned First).
- Leave Codes (highlighted in red):** Leave Code for State Sick (07 STATE SICK) and Leave Code for State Personal (08 STATE PERSON).
- Automatically Compute:** Checkboxes for Pay Rate, Daily Rate, Dock Rate, Accrual Rate, and Overtime Rate, all of which are checked.
- Default Overtime Object Code:** Dropdown menus for Professional, Para-Professional/Hourly, and Other.
- TEA Health Ins Contribution:** A table with columns for Amount, Obj, and Subj, with rows for Payroll 4, 5, and 6.
- First Pay Date of School Year:** Input fields for Payroll 4, 5, and 6, with Payroll 6 set to 09-20-2017.
- TEAM Extract Options:** Use Pay Dates for TRS Month or Actual Date (P - Pay Dates For TRS Month) and Pay Type 3 - Report Actual or Scheduled Hours (A - Actual Hours).

2. **Verify employee data is correct.** The easiest way to verify is through a User Created Report. Run a report from **Reports > User Created Reports>HR Report**, selecting the following data elements:

- Active Employees Only
- Employee Nbr
- First Name
- Last Name
- Percent of Day Employed
- Years Professional Experience
- Years Non Professional Experience
- Job Description
- Contract Begin Date
- Contract End Date
- Number of Days Employed

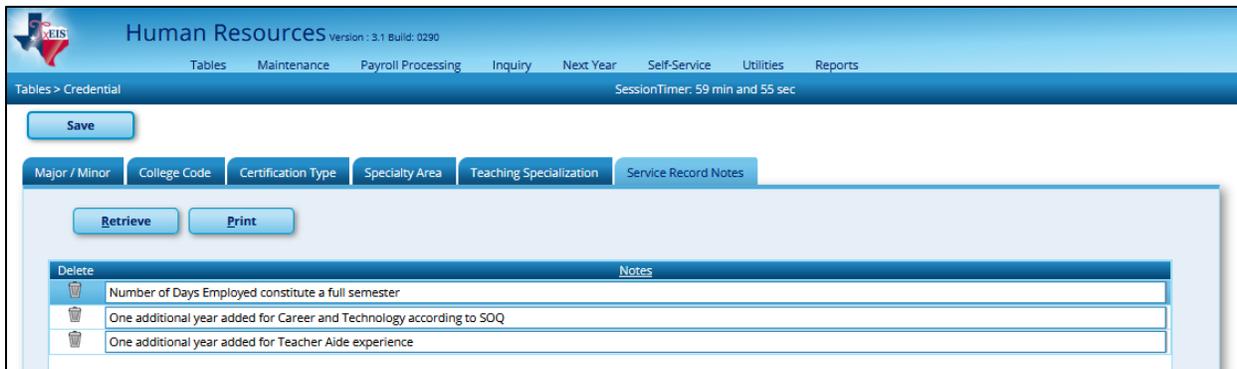
The sort/filter options may make it easier to verify data.

Note: By pulling the report to only include Active employees, you may miss employees who left your district early. If so, be sure to verify information on those employees individually.

Verify the following:

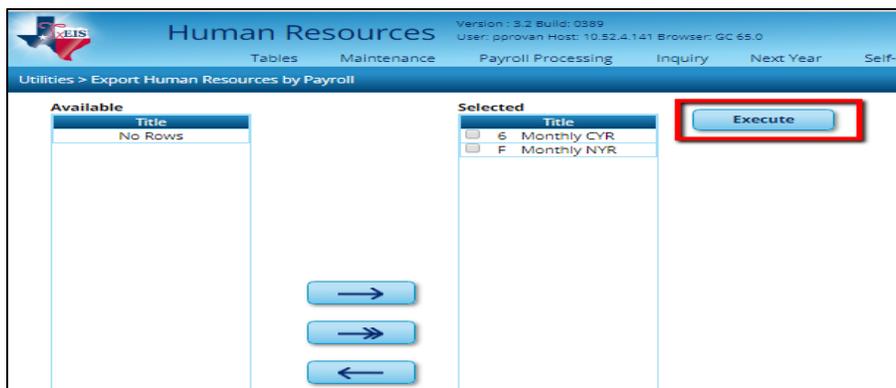
- Percent Day Employed – most will be 100% (1.0 on report). Watch for employees that are marked less than 100% and for those who should be less than 100%.
- Years' Experience – most will have either professional years or non-professional years. It is possible someone started as a non-professional such as an aide and then became a professional and would therefore have years' experience in both categories, but it won't happen very often.
- Job Description – pulls from Job Info screen. If employee has multiple jobs, all should pull. However, if they changed jobs and you removed the old job in the job info screen, you may need to manually add the information for the old job.
- Nbr of days Employed – verify accuracy. Watch for those who started late or left early to ensure accuracy.

3. Review Service Record Notes. From **Tables > Credential > Service Record Notes**, review and modify table as desired – table is user-defined. This note area is intended to help the district to record information that is pertinent to specific service years.



4. Make a backup of Payroll. From **Utilities > Extract Human Resources by Payroll**, select all payroll frequencies and pull to the right. Execute and save all backups in the Service Records folder.

Note: There will be a file for each payroll frequency.



5. Enter Extract criteria.

Utilities > Extract Teacher Service Record,

- Enter Pay Type 1, 2, & 3 excluding Pay Type 4 for Substitutes. If 1, 2 & 3 is not entered and this is left blank then all employees will pull including sub's.
- Enter other criteria as desired.
- Enter either Contract Begin Dates *or* Payoff Dates for this school year.
- Once the parameters are selected, click **Execute**.

Note: In prior Service Record Instructions you did not have to enter Pay Type 1, 2, & 3. TxEIS would pull employees but would not pull the Substitutes. Due to PEIMS now requiring a contract Begin and End date for subs, you will need to be specific on selecting the Pay Types 1, 2, & 3 that you want to extract.

Human Resources
Version : 3.2 Build: 0393
User: pprovan Host: 10.52.4.141 Browser: FF 60.0
Change Application
Year: C
Frequency: 6
Tables Maintenance Payroll Processing Inquiry Next Year Self-Service Utilities Reports
Utilities > Extract Teacher Service Record SessionTimer: 58 min and 54 sec HRS7500 Cou

School Year: 2017 - 2018
Frequency: 4 5 6
Execute

Pay Type: 1,2,3
Job Code:
Accrual Code:
Extract ID:
Employee Nbr:
Hours Per Day: 8.00
 Update Leave Only

Contract Begin Dates
From: 07-01-2017
To: 06-30-2018

Payoff Dates
From: 09-01-2017
To: 08-31-2018

Nbr Days Employed
From: 0
To: 366

Non-Professional Years Experience
 Total
 In District

Notes

Consider the following:

- **School Year** – Defaults to current school year from Finance District Options screen.
- **Frequency** – System selects frequencies authorized for use by the User.
- **Pay Type, Job Code, Accrual Code, Extract ID, and Employee Nbr** – Defaults to blank for all. User can select certain groups of employees by clicking the Ellipses boxes  to the right of each field. We recommend using these only when trying to limit employees you want to extract.
- **Hrs per Day** – only needed if you track State Sick or Personal Leave in hours rather than days. If you track in days/half days, this field is not used.
- If tracking **State Leave in Hours**, TxEIS will use the number of hours per day indicated here to convert leave into days for the Service Record.

Example: An employee has 27.0 hours in the leave record and you have entered 8.0 in the Hours Per Day field, then the result will be 3.38 days. $27.0 \text{ hours} \div 8 = 3.38$

- The **Update Leave Only** field is used to update the leave balances for employees where the service record has been extracted previously. Only primary jobs are extracted. This feature is primarily used for those employees whose new contracts begin in July or August and their Service Records are extracted at the end of June. Then they have leave in July and August that needs to be posted to their previous contract year Service Record. This feature can also be used if an employee has paid off early and the Service Record was created at that time and later it was found that some leave did not get posted. The employee's master leave record can be updated and then this feature can be used to update the Service Record also.

Notes – User can modify an existing note or type a new note. This area will accommodate the allowance of a footnote on a Service Record. Notes that are used regularly can be added to the Service Record Notes table so that user will not have to keep re-typing the note. Pre-set note will appear when user begins to type as shown in the screen shot below.

Keep in mind that **any note entered will be placed on all employees' Service Records** included in the extract criteria. In most cases, a note will not be chosen when extracting a large group of employees unless the note applies to all employees in the extract. It is recommended that the notes be added individually to the employee's Service Record maintenance screen.

User can also modify an existing note, or type a new note not already in the Table. This note will print under the corresponding School Year on the Service Record. In most cases a note will not be chosen when extracting a group of employees, unless note applies to all employees in extract.

- Contract Begin Dates** - User may enter the beginning and ending contract dates to be considered for the extract process. Use of these fields for selection purposes is optional. These dates are used when selecting the contract records for the extract process. If these dates are not used, the system will extract ALL employees, regardless of whether or not they were under contract for the most recent school year. To isolate your extract to only those employed under contract during the most current school year, enter a *from* and *to* beginning contract date range to be used for the extract (such as 06-01-2017 to 05-31-2018).

Use EITHER Contract Begin Dates or Payoff Dates

- Payoff Dates** – User may enter the beginning and ending payoff dates to be considered for the extract process rather than Contract Begin Dates. Use of these fields for selection purposes is optional. These dates are used when selecting the employee records for the extract process. If these dates are not used, the system will extract ALL employees, regardless of whether or not they were employed for the most recent school year. To isolate your extract to only those employed during the most current school year, enter a *from* and *to* payoff date range to be used for the extract (such as 09-01-2017 to 08-31-2018).

- Nbr Days Employed** - allows User to enter a range in the *from* and *to* number of days to limit employee selection. Typing the fewest and greatest number of days employed from the Job Info tab extracts records for all employees within that range (e.g., 001-365). The system pulls from the *# of Days Empld* field on the Staff Job/Pay, Job Info screen and does not take into consideration the *Serv Rec Days Ded* field on the Leave Adjustment, Abs Ded, or Cd Abs Ded tabs. Usually this field is left blank unless the desired extract requires them.

- **Non-Professional Years' Experience** – select whether you want to display Total Year of Experience or only Experience In District for Non-Professional staff (TRS Member Positions 03 and 04.)

6. Delete employees you don't want to extract Service Records on and Continue.

When you execute, a list of employees meeting the criteria selected they will display. Any employees who has a service record extracted for this year already will have 2 or more lines, one of which will be highlighted in blue. The blue line represents the initial extract. Review all lines for that employee to determine which should be permanently written to the service record. Select Delete for rows that you do not want.

Example 1: Lauren Bacall was initially extracted with 186.00 days employed. The new line shows 163.00 days employed. If the original (186 days) line is correct select Delete for the new line. If the New Line (163 days) is correct select delete for the blue line.

Select	Delete	New	Emp Nbr	Employee Name	Position Held	Grades Taught	Yrs Exp	% Of Day Empld	Nbr Days Empld	S Beg
<input type="checkbox"/>	<input type="checkbox"/>	New	000168	ALLEN, WOODY	SUBSTITUTE			0	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000213	ANDREWS, JULIE	TEACHER'S AIDE		01	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000234	ANISTON, JENNIFER	KINDERGARTEN TEACHER		00	100	186.50	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000010	ASTAIRE, FRED	TEACHER SUBSTITUTE	PK-5	00	100	0.00	20
<input checked="" type="checkbox"/>	<input type="checkbox"/>		000181	BACALL, LAUREN	2ND GRADE TEACHER		15	100	186.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000181	BACALL, LAUREN	2ND GRADE TEACHER		15	100	163.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000232	BEATRY, WARDEN	SECONDARY MATH		00	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000128	BRONSON, PIERCE	TECH SUPPORT		02	100	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000005	BULLOCK, SANDRA	SUPERINTENDENT'S SECRETARY		20	100	226.00	20
<input checked="" type="checkbox"/>	<input type="checkbox"/>		000231	CLOONEY, GEORGE	SECONDARY SOCIAL STUDIES		06	100	207.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000231	CLOONEY, GEORGE	SECONDARY SOCIAL STUDIES		06	100	207.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000132	CRAWFORD, JOAN	PRINCIPAL'S SECRETARY		06	100	226.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000219	CRUISE, TOM	PRINCIPAL		21	100	226.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000220	DAMON, MATT	SUPERINTENDENT		30	100	226.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000235	DAVIS, BETTE	SUBSTITUTE			0	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000012	DEPP, JOHNNY	FULL TIME CUSTODIAN		24	100	226.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000232	DIAZ, CAMERON	4TH GRADE TEACHER			100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000228	DICAPRIO, LEONARDO	PART TIME MAINTENANCE			100	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000059	FIELDS, SALLY	AIDE		28	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000230	FONDA, JANE	3RD GRADE TEACHER		05	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000024	HAWN, GOLDIE	ALL-LEVEL COUNSELOR	1-12	33	100	90.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000179	HOLMES, KATIE	SECONDARY SCIENCE		08	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000236	JOLIE, ANGELINA	SUBSTITUTE			0	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000056	KEATON, DIAN	AIDE		28	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000146	KELLY, GRACE	SECONDARY ENGLISH		06	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000064	KIDMAN, NICOLE	VOCATIONAL HOME MAKING		12	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000042	LOPEZ, JENNIFER	CAFETERIA FULL TIME		20	100	184.50	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000229	MINNELLI, LIZA	SECONDARY MATH		01	100	197.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000223	MONROE, MARILYN	ELEMENTARY TEACHER		29	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000004	MOORE, DEMI	NURSE		15	100	182.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000108	PALTROW, GWYNETH	ELEMENTARY TEACHER	6-12	14	100	207.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000076	PFEIFFER, MICHELLE	AIDE		13	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000011	ROBERTS, JULIA	1ST GRADE TEACHER		1	40	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000192	RYAN, MEG	CAFETERIA FULL TIME		03	100	182.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000099	STONE, SHARON	5TH GRADE TEACHER		4	14	187.00	20

Example 2: George Clooney has update leave information. (Must scroll to the right to see). Again choose which line should be deleted.

Nbr Days Empld	Service Begin Date	Service End Date	Sick Lv Pr Yr Bal	Sick Lv Earned	Sick Lv Used	Sick Lv EOY Bal	Pers Lv Pr Yr Bal	Pers Lv Earned	Pers Lv Used	Pers Lv EOY Bal	Dist Type	Full Sem
0.00	20170815	20180524	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	PUBLIC	N
187.00	20170810	20180531	0.000	0.000	0.000	0.000	3.000	5.000	3.000	5.000	PUBLIC	N
186.50	20170810	20180531	0.000	0.000	0.000	0.000	0.000	5.000	5.000	0.000	PUBLIC	N
0.00	20170901	20180630	43.000	0.000	0.000	43.000	64.500	5.000	0.000	69.500	PUBLIC	N
186.00	20170811	20180430	0.000	0.000	0.000	0.000	1.500	5.000	0.000	6.500	PUBLIC	N
163.00	20170811	20180430	0.000	0.000	0.000	0.000	1.500	5.000	0.000	6.500	PUBLIC	N
187.00	20170811	20180531	0.000	0.000	0.000	0.000	0.000	5.000	3.500	1.500	PUBLIC	N
0.00	20170901	20180531	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	PUBLIC	N
226.00	20170901	20180831	0.000	0.000	0.000	0.000	25.500	5.000	0.000	30.500	PUBLIC	N
207.00	20170801	20180630	0.000	0.000	0.000	0.000	0.000	5.000	3.000	2.000	PUBLIC	N
207.00	20170801	20180630	0.000	0.000	0.000	0.000	0.000	5.000	5.000	0.000	PUBLIC	N
226.00	20170901	20180831	0.000	0.000	0.000	0.000	24.000	5.000	0.000	29.000	PUBLIC	N
226.00	20170701	20180630	0.000	0.000	0.000	0.000	5.500	5.000	0.000	10.500	PUBLIC	N

Select	Delete	New	Emp Nbr	Employee Name	Position Held	Grades Taught	Yrs Exp	% Of Day Empld	Nbr Days Empld	S Beg
<input type="checkbox"/>	<input type="checkbox"/>	New	000168	ALLEN, WOODY	SUBSTITUTE			0	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000213	ANDREWS, JULIE	TEACHER'S AIDE		01	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000234	ANISTON, JENNIFER	KINDERGARTEN TEACHER		00	100	186.50	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000010	ASTAIRE, FRED	TEACHER SUBSTITUTE	PK-5	00	100	0.00	20
<input type="checkbox"/>	<input checked="" type="checkbox"/>		000181	BACALL, LAUREN	2ND GRADE TEACHER		15	100	186.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000181	BACALL, LAUREN	2ND GRADE TEACHER		15	100	163.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000233	BEATTY, WARREN	SECONDARY MATH		00	100	187.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000128	BRONSON, PIERCE	TECH SUPPORT		02	100	0.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000005	BULLOCK, SANDRA	SUPERINTENDENT'S SECRETARY		20	100	226.00	20
<input type="checkbox"/>	<input checked="" type="checkbox"/>		000231	CLOONEY, GEORGE	SECONDARY SOCIAL STUDIES		06	100	207.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000231	CLOONEY, GEORGE	SECONDARY SOCIAL STUDIES		06	100	207.00	20
<input type="checkbox"/>	<input type="checkbox"/>	New	000132	CRAWFORD, JOAN	PRINCIPAL'S SECRETARY		06	100	226.00	20

Once the selections have been made click Continue at the bottom of the screen to get your preview.

Date Run: 04-18-2018 2:42 PM
Cny Dist: 030-901

Teacher Service Record Extract
TEST ISD

Page: 1 of 4

Rows Created

School Yr	Emp Nbr	Employee Name	Position Held	Yrs Exp	Pct Day Empld	Nbr Days Empld	PY Balance	Earned	Used	EOY Balance
2018	000371	ANDREWS, JULIE	TEACHER	21	100	187.00	Sick: 0.00	0.00	0.00	0.00
PUBLIC	N					Begin: 08-07-2017 End: 05-31-2018	Pers: 1.00	5.00	0.00	6.00
2018	000321	BACALL, LAUREN	SECONDARY MATH	14	100	187.00	Sick: 0.00	0.00	0.00	0.00
PUBLIC	N					Begin: 08-07-2017 End: 05-31-2018	Pers: 65.50	5.00	0.00	70.50
2018	000392	BASINGER, KIM	SPECIAL EDUCATION AIDE	00	100	180.00	Sick: 0.00	0.00	0.00	0.00
PUBLIC	N					Begin: 08-17-2017 End: 05-29-2018	Pers: 0.00	5.00	4.50	0.50
2018	000082	BEATTY, WARREN	2ND GRADE TEACHER	18	100	187.00	Sick: 0.00	0.00	0.00	0.00
PUBLIC	N					Begin: 08-07-2017 End: 05-31-2018	Pers: 1.50	5.00	3.50	3.00
2018	000385	BERRY, HALIE	SPECIAL EDUCATION AIDE	00	100	180.00	Sick: 0.00	0.00	0.00	0.00
PUBLIC	N					Begin: 08-14-2017 End: 05-19-2018	Pers: 0.00	5.00	0.50	4.50

At the preview, review the list to ensure it includes only those employees you wish to extract and Process.

Teacher Service Record Extract
TEST ISD
Rows Created

Date Run: 04-18-2018 2:42 PM
Cnty Dist: 030-901
Page: 1 of 4

School Yr	Emp Nbr	Employee Name	Yrs	Pct Day	Nbr Days	PY	EOY
Dist Type	Full Sem	Grds Taught	Exp	Empld	Empld	Balance	Balance
2018	000371	ANDREWS, JULIE	21	100	187.00	Sick: 0.00	0.00
PUBLIC	N	TEACHER	Begin: 08-07-2017	End: 05-31-2018	Pers: 1.00	5.00	6.00
2018	000321	BACALL, LAUREN	14	100	187.00	Sick: 0.00	0.00
PUBLIC	N	SECONDARY MATH	Begin: 08-07-2017	End: 05-31-2018	Pers: 65.50	5.00	70.50
2018	000392	BASINGER, KIM	00	100	180.00	Sick: 0.00	0.00
PUBLIC	N	SPECIAL EDUCATION AIDE	Begin: 08-17-2017	End: 05-29-2018	Pers: 0.00	5.00	4.50
2018	000082	BEATTY, WARREN	18	100	187.00	Sick: 0.00	0.00
PUBLIC	N	2ND GRADE TEACHER	Begin: 08-07-2017	End: 05-31-2018	Pers: 1.50	5.00	3.50

7. **Review and edit as needed.** All necessary information is now stored and can be reviewed at **Maintenance > Staff Demo > Service Record** tab. Click on the spyglass beside the school year you wish to review and/or edit. The information for that school year will be displayed below. Edit as desired and Save changes.

Human Resources Version: 3.2 Build: 0389
User: pprovan Host: 10.52.4.141 Browser: GC 65.0

Maintenance > Staff Demo SessionTimer: 59 min and 32 sec

Employee: 000321 : BACALL, LAUREN

Demographic Information | Credentials | Verification | Insurance | **Service Record** | Responsibility

Delete	Details	School Year	Position Held	Service Begin Date
		2018	SECONDARY MATH	08-07-2017
		2017	SECONDARY MATH	08-01-2016
		2016	SECONDARY MATH	08-01-2015
		2015	SECONDARY MATH	08-01-2014
		2014	SECONDARY MATH	08-12-2013

Rows: 1 of 5 + Add

School Year: 2018 Position Held Description: SECONDARY MATH School Grades Taught:

% Day Employed: 100 Service Begin Date: 08-07-2017 Years Experience: 14 Full Semester

of Days Employed: 187.00 Service End Date: 05-31-2018 District Type: PUBLIC

State Sick Leave

State Sick Leave - PY Balance:	0.00
State Sick Leave Earned:	0.00
State Sick Leave Used:	0.00
State Sick Leave - EOY Balance:	0.00

State Personal Leave

State Personal Leave - PY Balance:	65.50
State Personal Leave Earned:	5.00
State Personal Leave Used:	0.00
State Personal Leave - EOY Balance:	70.50

Other Considerations

- If employees were docked through the leave system, adjustments will be displayed in **Maintenance > Leave Account Transaction > Leave Adjustment Tab**. TxEIS will calculate the days to put on the service record by subtracting any days listed in the Serv Rec Days Ded column from the number of days employed on the Job Info screen.

Human Resources Version: 3.2 Build: 0389
User: pprovan Host: 10.52.4.141 Browser: GC 65.0

Maintenance > Leave Account Transaction SessionTimer: 57 min and 34 sec

Save

Employee: 000357: BROSNAN, FIERCE Retrieve Directory

Staff Leave Maint Leave Adjustment Employee Substitute Mass Update Pay Date Mass Delete

Leave Type	Begin Balance	Leave Earned	Leave Used	Ending Balance
01 - DIST. LEAVE	0.000	2.000	0.000	2.000
03 - PROFESSIONAL LEAVE	0.000	0.000	1.000	0.000
04 - FUNERAL LEAVE	0.000	3.000	2.000	1.000
08 - STA PERSONAL	5.000	5.000	2.500	7.500
11 - JURY DUTY	0.000	0.000	0.000	0.000

Print Balance

Pay Date: 01-19-2018 Check Number: 008523 Retrieve

Delete	Void	Adj Nbr	Abs/Earned Date	Leave Type	Leave Type Description	Abs Reason	Abs Reason Description	Leave Used	Leave Earned	Serv Rec Days Ded	Time of
R		0	12-08-2017	08	STA PERSONAL	02	STATE PERSONAL	0.500	0.000	0.00	8 - HALF DAY HN - HALF

- If errors exist that prevents a Service Record from being created during the extract process, then a “Records Not Created” report will display. You will have the choice to CANCEL and correct or, if errors are acceptable you will have the option to CONTINUE. If CONTINUE is chosen, then these employees will not have a Service Record created with this extract.

Continue Cancel

Teacher Service Record Extract

Date: 06-08-2011 2:14 PM Run: Cnty: 226-907 Dist: TXEIS ISD Page: 1 of 1

Records Not Created / Extract Warning Messages

School Yr	Emp Nbr	Position Held Description	Message
2011	000021	Bullock, Sandra SCIENCE	Freq: 6 Warning: Service Record Days Enrol'd greater than Job Days Enrol'd for Job Code: 0654

If there are no employees to match the extract criteria, then no service record will be created and the system will issue the following message: “No Service Data Extracted.”

- If needed add Service Record Notes to Individual Employees.

Maintenance > Staff Demo > Service Record Tab

The screenshot shows the 'Service Record' tab for employee SANDRA BULLOCK (ID: 000005). The table below lists her service history:

Delete	Details	School Year	Position Held	Service Begin Date
		2018	SUPERINTENDENT'S SECRETARY	09-01-2017
		2017	SUPERINTENDENT'S SECRETARY	09-01-2016
		2016	SUPERINTENDENT'S SECRETARY	09-01-2015
		2015	SUPERINTENDENT'S SECRETARY	09-01-2014
		2014	SUPERINTENDENT'S SECRETARY	09-01-2013
		2013	SUPERINTENDENT'S SECRETARY	03-01-2013
		2013	TEACHERS AIDE	08-20-2012
		2012	TEACHER'S AIDE	08-15-2011
		2011	TEACHER'S AIDE	08-16-2010

The 'Notes' field contains the following text:

One additional year added for Career and Technology according to SOQ
One additional year added for Teacher Aide experience

Below the table, the current record for 2018 is shown with details: Position Held Description: SUPERINTENDENT'S SECRETARY, School Grades Taught: (empty), % Day Employed: 100, Service Begin Date: 09-01-2017, Years Experience: 20, Full Semester: , # of Days Employed: 226.00, Service End Date: 08-31-2018, District Type: PUBLIC.

Leave balances are shown in two sections:

State Sick Leave		State Personal Leave	
State Sick Leave - PY Balance:	0.00	State Personal Leave - PY Balance:	25.50
State Sick Leave Earned:	0.00	State Personal Leave Earned:	5.00
State Sick Leave Used:	0.00	State Personal Leave Used:	0.00
State Sick Leave - EOY Balance:	0.00	State Personal Leave - EOY Balance:	30.50

- You should always scroll down to look for duplicates when you get the Data Preview screen. If you see an employee listed more than once for the same 'Position Held', you will need to choose which extract to delete for that employee. "NEW" is the current extract and the other line(s) are from a previous extract for that employee. Duplicate Service Records will be created if no deletion is chosen.

Select	Delete	New	Emp Nbr	Employee Name	Position Held	Grades Taught	Pay Step	Yrs Exp	% O Em
<input checked="" type="checkbox"/>	<input type="checkbox"/>		000269	ALLEN, WOODY A	FULL TIME MAINTENANCE			01	100
<input type="checkbox"/>	<input type="checkbox"/>	New	000269	ALLEN, WOODY A	FULL TIME MAINTENANCE			01	100
<input type="checkbox"/>	<input type="checkbox"/>		000211	ANDREWS, JULIE K	SECONDARY SCHOOL COUNSELOR			12	100
<input type="checkbox"/>	<input type="checkbox"/>	New	000211	ANDREWS, JULIE K	SECONDARY SCHOOL COUNSELOR			12	100
<input type="checkbox"/>	<input type="checkbox"/>		000121	ANISTON, JENNIFER J	HIGH SCHOOL PRINCIPAL	6-8		18	100
<input type="checkbox"/>	<input type="checkbox"/>	New	000121	ANISTON, JENNIFER J	HIGH SCHOOL PRINCIPAL	6-8		18	100
<input type="checkbox"/>	<input type="checkbox"/>		000181	ASTAIRE, FRED L	SECONDARY BUSINESS	9-12		05	100
<input type="checkbox"/>	<input type="checkbox"/>	New	000181	ASTAIRE, FRED L	SECONDARY BUSINESS	9-12		05	100
<input type="checkbox"/>	<input type="checkbox"/>		000055	BACALL, LAUREN F	SPECIAL EDUCATION AIDE	AIDE		23	100
<input type="checkbox"/>	<input type="checkbox"/>	New	000055	BACALL, LAUREN F	SPECIAL EDUCATION AIDE	AIDE		23	100
<input type="checkbox"/>	<input type="checkbox"/>		000210	BEATTY, WARREN	SUPERINTENDENT			17	100

- If an employee has changed jobs during the year and is no longer being paid for the original job, both jobs should remain on the Job Info screen. The % Assigned field requires at least 1% in the original job for it to remain available on the Job Info screen and the new job should be marked as Primary. When the extract is performed, both jobs will be extracted for the Service Record and you will not need to manually add any job information for the original job.
- If the employee has changed jobs during the year and the original job no longer displays on the Job Info screen, you must manually add the original job to the Service Record maintenance screen found under the Staff Demo screen.
- If an employee has multiple jobs, all jobs will be extracted. Always review the extracted information and perform maintenance if invalid information exists.
- In the Service Record Maintenance screen check accuracy of:
 - ✓ Begin and End Dates for each Job
 - ✓ # Days Employed for each Job
 - ✓ State Leave amounts and if the balances flow from year to year.

Updating Leave After Service Record Extract

If leave is taken after you have completed the Service Record Extract, you may update those balances from **Utilities > Extract Teacher Service Record**. Select the criteria for the employees you wish to update and check the Update Leave Only box.

The screenshot shows the 'Human Resources' system interface. The breadcrumb trail is 'Utilities > Extract Teacher Service Record'. The interface includes several input fields and buttons:

- School Year:** 2017 - 2018
- Frequency:** Radio buttons for 4, 5, and 6 (6 is selected).
- Execute** button
- Pay Type:** Input field with a dropdown arrow.
- Job Code:** Input field with a dropdown arrow.
- Accrual Code:** Input field with a dropdown arrow.
- Extract ID:** Input field with a dropdown arrow.
- Employee Nbr:** Input field with a dropdown arrow.
- Hours Per Day:** Input field with value .00.
- Update Leave Only:** Checked checkbox, highlighted with a red box.
- Contract Begin Dates:** From: 07-01-2017, To: 06-30-2018.
- Payoff Dates:** From: 00-00-0000, To: 00-00-0000.
- Nbr Days Employed:** From: 0, To: 366.
- Non-Professional Years Experience:** Radio buttons for Total and In District (In District is selected).
- Notes:** A text area for additional information.

The screenshot shows a preview window titled 'Teacher Service Record Extract' for 'TEST ISD'. The 'Process' button is highlighted with a red box. The table below shows records updated for leave balances.

Emp Nbr	Employee Name	Position Held	Prior Yr Bal	Earned	Used	End Of Yr Bal	Prior Yr Bal	Earned	Used	End Of Yr Bal
000371	ANDREWS, JULIE	TEACHER	Sick: .00	.00	.00	.00	Pers: 1.00	5.00	.00	6.00
000321	BACALL, LAUREN	SECONDARY	Sick: .00	.00	.00	.00	Pers: 65.50	5.00	.00	70.50
000392	BASINGER, KIM	SPECIAL	Sick: .00	.00	.00	.00	Pers: .00	5.00	4.50	.50
000082	BEATTY, WARREN	2ND GRADE	Sick: .00	.00	.00	.00	Pers: 1.50	5.00	3.50	3.00
000385	BERRY, HALIE	SPECIAL	Sick: .00	.00	.00	.00	Pers: .00	5.00	.50	4.50
000384	BERRY, HALLIE	CAFETERIA FULL	Sick: .00	.00	.00	.00	Pers: 1.00	5.00	1.00	5.00
000090	BOGART, HUMPHREY	FULL TIME	Sick: 45.00	.00	.00	45.00	Pers: 98.00	5.00	.00	103.00
000301	BRANDO, MARLON	SECONDARY	Sick: .00	.00	.00	.00	Pers: .00	5.00	2.00	3.00
000397	BRONSON, CHARLES	CAFETERIA FULL	Sick: .00	.00	.00	.00	Pers: .00	2.50	.00	2.50
000357	BROSNAN, PIERCE	2ND GRADE	Sick: .00	.00	.00	.00	Pers: 5.00	5.00	2.50	7.50

Previews will alert you to which records will not be updated for leave balances as well as which records will be updated. Review for accuracy. Cancel and make corrections if needed, or Continue and Process to update the leave balances.

Printing the Service Record

An Official Service Record is available upon the employees' request. To print a Service Record, go to **Reports > HR Reports > Personnel Reports > Teacher Service Record (HRS1400)**.

Re-verify all information. This is the Official Teacher Service Record and must be signed by the employee and the district personnel authorized to sign off on Service Records. Convert to pdf to print.

Human Resources Version: 3.1 Build: 0290

Tables Maintenance Payroll Processing Inquiry Next Year Self-Service Utili

Reports > HR Reports > Personnel Reports > Teacher Service Record

Return to Reports

Report ID: **HRS1400**
 Frequency: **6**
 User ID: **PPROVAN**

Parameter Description	Value
Sort by Alpha (A), Pay Campus (C), Primary Campus (P)	A
Pay Status Active (A), Inactive (I), or blank for ALL	
Pay Type 1-4, or blank for ALL	
Pay Step	
School Year (YYYY), or blank for ALL	2018
County	TAYLOR
Sort School Year Ascending or Descending? (A/D)	A
Print Landscape? (Y/N)	Y
Expand Header? (Y/N)	Y
Enter Optional Typewritten Title	MATT DAMON, SUPERINTE
Service Begin Date (MMDDYYYY), or blank for ALL	
Service End Date (MMDDYYYY), or blank for ALL	
Select Accrual Code(s), or blank for ALL	...
Select Pay Campus(es), or blank for ALL	...
Select Primary Campus(es), or blank for ALL	...
Select Extract ID(s), or blank for ALL	...
Select Employee(s), or blank for ALL	000231
Include All Service Records? (Y/N)	N

Run Preview
Clear Options

This will print under the Authorized Signature line on the Service Records

If you need to print only certain Employees, you will enter the Employees number(s) then enter 'N' for the Include all Service Records.

If you need to print all records enter a 'Y' for the Include all Service Records. You will not enter Employee number(s).

Human Resources Version: 3.1 Build: 0290

Change Application Exit Application Help

Year: C

Tables Maintenance Payroll Processing Inquiry Next Year Self-Service Utilities Reports Frequency: 6 Change

Reports > HR Reports > Personnel Reports > Teacher Service Record SessionTimer: 59 min and 07 sec County/District #: 104903

Exception Cancel

Date Run: 06-06-2018 11:28 AM Teacher Service Record TEST ISD Page: 1 of 1

Name: CLOONEY GEORGE Public School Service Record
 Last First Mi TEST ISD
 1100 Main
 TEST, TX 71111-
 TEA ID: UID not on
 (817) 123-4567 County: TAYLOR

Employee Signature: _____

(A) State Sick Leave
 (B) State Personal Leave Program

Indicate if a full semester, if it

School Year	District Type	Position Held	% of Yrs Exp	No Day Days Emp	Is less than 90 days	Dates of Service From - To	Prior Yr Bal	Earned	Used	Remaining Balance
2017-18	PUBLIC	SECONDARY SOCIAL STUDIES	06	100	207.00	08-01-2017 06-30-2018 (A) (B)	.00	.00	.00	.00
							.00	5.00	3.00	2.00

Authorized Signature: _____
 MATT DAMON, SUPERINTENDENT



You are not required to print a service record for every employee every year. However, you must be able to produce a complete record of service at your district upon employee request and/or when the employee leaves the district. The process of successfully extracting service records stores a Service Record in the employee's file in TxEIS for future availability.

How are Years of Service Determined?

According to the instructions for completing a teacher service record, you should record actual experiences by Sept 1 of the school year. This means the current school year is not included in the total years of service.

Example 1:

John graduated in 2017. He came to work at your district in August 2017. As of Sept 1, 2017 he has not yet completed a year of service so his record will indicate '0' year experience for 2017-2018.

Example 2:

Amy was a certified teacher's aide in 2009-2010, 2010-2011, 2011-2012. She then got her degree and teaching certificate and began as a teacher during the years of service, Section 53.1021, Section M says that Amy can receive up to 2 years of creditable service applied for salary increment purposes. So Amy should show 8 years' experience (2010= 0, 2011 = 1, 2012 = 2, 2013 = 3....2018 = 8) she should be on step 7 for salary purposes (only 2 years' credit for aide job, not 3) for 2018. She will be on step 8 for 2018-2019, We recommend adding a note indicating she was given 2 years' credit for salary increment purposes and therefore was paid on Step 7 for 2018.

Where is Service Record information extracted from within the system?

Service Record Field	System Data Fields	Screen
School Year	The Current School Year from Finance District Options and all previous years that the employee has worked for the District	Finance – District Finance Options Table
Position Held Description	Employee's Job Code	Job Info
School Grades Taught	Grade(s) Taught	Employment Info
Years Experience	TRS Member Position Code If: 01(Professional) - Prof Years Exp Total 02(Teacher, Librarian) - Prof Years Exp Total 05(Nurse, Counselor) - Prof Years Exp Total 03(Support Staff) - Years Exp in District 04(Bus Drivers) - Years Exp in District	Employment Info Employment Info Employment Info Employment Info Employment Info
% Day Employed	Percent Day Employed	Employment Info
# of Days Employed	Calendar Info box - # of Days Empld minus Leave Serv Rec Days Ded	Job Info Leave Acct Trans>Adj
Service Begin and End Dates	Calendar Info box - Begin Date, End Date	Job Info
Notes	Extract parameter or Maintenance>Staff Demo	Extract or Staff Demo
State Sick Leave	State Sick Leave (Old)	Leave Balance
State Personal Leave	State Personal Leave (Current)	Leave Balance