FY19 Staff EMIS Checklist for Initial Staff and Course Collection

NOTE: This checklist will assist you in reporting your Staff EMIS data, but you also need a copy of the Current EMIS Manual, Section 3 - Staff Records. The EMIS Manual contains specific requirements and rules. This checklist does not duplicate the EMIS Manual.

http://education.ohio.gov/Topics/Data/EMIS
Click on 'EMIS Manual' under 'EMIS Documentation'.
Scroll down to Section 3 for Staff Records and the individual sub-sections

CHECKLIST
1. USPS staff records
   Start by updating EMIS related fields in USPS for your current employees. See tables 2 and 3 for a list of the EMIS related USPS fields, and Section 3 of the EMIS Manual for details.
   a. Use the USPSCN modules to make your updates.
   b. Or, use USPSWeb
      i. The ability to add and maintain CC – Contractor Only Staff, and CJ – Contractor Staff records, is in the USPS Web application **only**.

2. Supplemental Jobs
   a. Report all supplemental jobs when the employee is hired or starts the job.
      i. Include individuals whose only position in the district is supplemental.
      ii. ex. Coaching, Advising
      iii. 8xx position codes

3. Report to EMIS flags
   a. Some of you added new employees, but to keep them out of Final Staff and Course Collection (FY18), you set their 'Report to EMIS' flags to 'N'. Now is the time to set these flags to 'Y'.
      i. Set the Report to EMIS flag to 'Y' on both USPSCN/DEMSCN and USPSCN/POSSCN.

4. See the last page for instructions on EMIS reporting of an employee leaving your district.
   a. Consider employees who left during this school year and before

5. CLRATD
   a. CLRATD will clear the EMIS Long Term Illness field found on USPSCN/BIOSCN in preparation for the next reporting period.
   b. At the MENU> prompt type CLRATD
      i. Run date and time: _____
   c. This program does not create a report. It will display a processing complete message to the screen when it is finished, along with the number of employees where long term illness was cleared. The count will be high because it includes inactive employees as well.

6. MASINC
   a. MASINC is used to mass increment the experience fields on DEMSCN. The 'Total' and 'Authorized' fields are required for EMIS reporting. (This is experience through the end of LAST YEAR!)

  i. 'Total' is reported in the EMIS Total Experience Years element. This includes any years worked as a certified/licensed employee (teacher, superintendent, principal, treasurer) as defined in the EMIS Manual.

  ii. 'Authorized' is reported in the EMIS Authorized Teaching Experience Years element. This includes only years of teaching, as defined in the EMIS Manual.

  iii. Type MASCHG at the MENU> prompt and then select the option for MASINC.
- Run for the Projection option
- Set Appointment Type to 1 for Certified employees. (This is the 'Type of Appt' field on JOBSCN.)
- Select only those employees reportable to EMIS.
- New employees should not have their years of service incremented, so use the 'Exclude employees based on hire date' prompt to filter them out.
- In the 'Fields to increment' section of the screen, enter 'I' for Total and Authorized. These are the required fields for EMIS.
- Execute and check the report.

  iv. If the report is correct, run MASINC again for the Actual option.
- Run date and time: _____

  v. Be sure to include "Principal Experience Years" (if less than 10 years, report with a Leading zero)[required beginning in FY18][DEMSCN]

7. MASEMIS
- a. EMIS looks first at the 'EMIS Contract Info' fields on the right side of screen 2 of JOBSCN.
- b. If those values are blank, EMIS will use the payroll fields for those values.
  - i. Hours per day in the middle column of JOBSCN, screen 2
  - ii. Obligation in the first column of JOBSCN, screen 2
  - iii. Work days in the first column of JOBSCN, screen 2
  - iv. FTE under Salary Schedule, last column of JOBSCN, screen 2
- c. If you have any employees that normally need values in the EMIS Contract Info fields, now is the time to enter that data. An example is an employee that has one job for payroll purposes, but two jobs for EMIS purposes. Another example is a non-esc employee with extended service who is paid on two jobs, but reported to EMIS as one job. In both examples, place the EMIS reportable data in the 'EMIS Contract Info' fields.
- d. Use the MASCHG/MASEMIS program in Projection mode to view anyone with current values. Set Hours per day, etc. to 'Y'. If you have anyone in the above situations, they need updated by hand with FY19 amounts. Don't run this program in actual mode. Let me know if you have anyone outside these situations with values on the report.

8. PERDET
Report lists EMIS demographic and job related data in USPS. This program is optional. The Data Collector will also generate these errors. You may find it helpful to run PERDET before the manifest is available in the Data Collector.
- a. At the MENU> prompt, type USPEMS, and then select PERDET.
- b. Fiscal Year = 2019

```
USPEMS Module: PERDET
PERDET - Personnel Data Detail Listing

Enter sort option (SN,N,I,P,A,C,E,?): <SN> _____

Enter Fiscal Year: <XXXX>____

Would you like to exclude concealed employees from being reported (Y,N)? <Y> _

Select by specific employee(s)? (Y,N): <N> _

Select by specific building IRN(s)? (Y,N): <N> _

Select by specific position code(s)? (Y,N): <N> _

Select only those employees containing errors (Y,N): <N> _

Select employees reportable to EMIS, Not reportable, or Both? (Y,N,B): <B>

Select appointment type(s) (A,1,2,3,4,5): <A         > _____

Select by specific position status (Y,N)? <N> _

Do you want each employee on a new page? (Y,N): <N> _

Are extended service days included in the work days in contract?(Y,N) <Y>_

Continue, Re-enter options, or Exit? (C,R,E,?): <C> _

Selection in progress, please wait!
Processing report . . .
Output file is PERDET.TXT
```

    c. Review the PERDET Report for data errors and omissions and make corrections as needed.

    d. To correct and/or add required information, refer to Table 2 or Table 3 to determine which USPSCN module you need to access, or use USPSWeb.

    e. Rerun PERDET until errors are resolved.

PERDET report example:

```
DATE: XX/XX/XX                                    SAMPLE CITY SCHOOL DISTRICT                                    PAGE:    1
TIME:  8:47 am                            EMIS DATA DETAIL LISTING WITH ERROR CHECKING                          (PERDET)
------------------------------------------------------------------------------------------------------------------------
888888888     SMITH, SUE                         Gender: Female   Race: White, Non-Hispanic    Birthdate: 04/18/62
          Attend days  :  245.0  Semester hours      :  110    Education Lvl: Bachelors    State Assgn ID: XXXXXXXXX
          Absence days :    1.5  Auth. experience years:   13    Degree major:    *         Rpt to EMIS/ID: Yes/123456789
          Long term dys:    0.0  Tot. experience years :   13    Other credential:          USPS EMIS ID  :
   Job:02  Title: TEACHER                   Status: Active/Continuing employee in same position in district
          Pos. code/desc  : 230 - Teacher Assignment                                       Assignment  Funding
          Report to EMIS  : Yes            Hours per day: 7.50  Separation reason: *           Area     Code  Percent
          Appointment type: Certificated   No. work days: 182   Separation date  : 00/00/0000  999370     L     100%
          Position type   : Regular        Extended srvc: 0      Low grade        : **
          Position FTE    : 1.00           Salary type  : Annual   High grade      : **
          Start date      : 08/25/1999     Salary amount: 57,640.00  HQPD           : Y
          Building IRN    : 555555         EMIS SPED FTE: 0.00    Qualified Parapro: *
------------------------------------------------------------------------------------------------------------------------
  ! - Indicates possible data error or invalid data in field.
  ? - Indicates the EMIS report flag does not correspond between the demographic record and position record.
  # - Indicates the position funding percentage(s) do not equal 100%.
 $$ - May produce an EMIS/ODE validation error.
 ++ - Informational message.
 ** - Indicates concealed employee (informational only)
```

9. USPEMX
   Extracts data from your USPS files and creates a sequential file (sequential file will be used by USPSDC in the next step to load data into the Data Collector).
   a. USPEMX will extract CC – Contractor Only Staff and CJ – Contractor Staff. These records are entered in USPSWeb.
   b. USPEMX will extract CL – Staff Summer Employment Separation records. These records are created automatically. Requirements:
      i. all jobs must have a position status of U
      ii. and a calendar stop date
      iii. and also a separation date after the last day of the previous school year, but before the first day of the current school year.
   c. At the MENU> prompt type USPEMS, and select the USPEMX option.
   d. Enter Fiscal Year 2019
   e. Are extended service days included in the work days in contract: This prompt is no longer relevant.
   f. Note: USPEMX will create the file USPEMX.SEQ. This file is no longer used because the Data Collector gathers this data automatically when a collection is started. USPEMX still needs to be run because it also creates the file USPEMX_EMISR.SEQ when necessary, and this data is not picked up automatically by the Data Collector.

```
USPEMX - Extract employee data into EMIS detail file format.

Enter Fiscal Year: <XXXX> ____

Are extended service days included in the work days in contract (Y,N)? <Y> _

Continue, Re-enter, or Exit? (C,R,E,?) <C> _

Processing, please wait!

Processing Completed!
Output file is USPEMX.SEQ
Output file is USPEMX_EMISR.SEQ
```

10. USPSDC
    If your run of USPEMX in the previous step creates the file USPEMX_EMISR.SEQ, this means your district has Contractor Staff records, Contractor Only records, and/or Staff Summer Employment Separation Records. At this time, these three records are not gathered automatically via SIF when a collection is started, so they need to be loaded into the Data Collector.
    a. To do this, at the MENU> prompt type USPSDC.
    b. Look for the message 'Process Complete' to display to the screen.
    c. Check the email message sent to you when the process is complete.

11. Notify your EMIS Coordinator that you have staff data ready for Initial Staff and Course Collection (FY19) submission. For submission of the Initial Staff and Course Collection, ask your EMIS Coordinator to check both the SIF Zone box and the EMIS Formatted Files box.

12. Ask your EMIS Coordinator for a copy of any Level 1 and Level 2 staff related errors, along with any Staff Missing in the Preview/Review option.
    a. Make any contractor related corrections in USPSWeb and then start again at step #9.
    b. If your corrections are not related to contractor records, make them as needed and start again at step #11.

13. ODE will send Post processing reports twice weekly. You can access these reports on the web at: http://reports.noacsc.org/   Click on EMIS.

14. Login to the Secure Data Center (via your SAFE account) and in 'Reports for Analysis' review the 'Teachers & Staff' reports.

Table 2 Staff Demographic Record (CI) Data Elements

The table below lists the location of each field within the traditional USPS screens. On USPSWeb, all fields are available under the EMIS option.

Record Field Number	Data Element	USPS Field Name	USPS Screen
CI150	*Absence Days Element*	See table 1	
CI155	*Absence Days/Long-term Illness Element, 15 consecutive days*	Long Term Ill	DEMSCN
CI140	*Attendance Days Element*	See table 1	
CI200	*Authorized Teaching Experience Years Element*	Authorized under Length of Experience	DEMSCN
CI070	*Date of Birth Element*	Birthdate	DEMSCN
CI225	*Early Childhood Education Qualification Element*	ECE Qualif	DEMSCN
CI100	*Education Level Element*	Education lvl	DEMSCN
CI050	*Employee ID Element*	EMIS ID; if blank, as defined on USPCON – 'EMIS reporting ID' flag	BIOSCN
CI090	*Gender Element*	Sex	DEMSCN
CI060	*Name Element*	Name	DEMSCN
CI080	*Racial/Ethnic Group Element*	Race	DEMSCN
CI110	*Semester Hours Element*	Semester hrs	DEMSCN
CI270	*State Staff ID Element*	State Assigned ID	DEMSCN
CI210	*Total Experience Years Element*	Total under Length of Experience	DEMSCN

Table 3 Staff Employment Record (CK) Data Elements

The table below lists the location of each field within the traditional USPS screens. On USPSWeb, all fields are available under the EMIS option.

Record Field Number	Data Element	USPS Field Name	USPS Screen
CK220	Assignment Area Element	Assign Area	POSSCN
CK090	Building IRN Element	Building IRN	POSSCN
CK050	Employee ID Element	EMIS ID; if blank, as defined on USPCON – 'EMIS reporting ID' flag	BIOSCN
CK210	Extended Service Element	Extended Service	POSSCN
CK260	Grade Levels Assigned\ Low Element	Low Grade	POSSCN
CK270	Grade Levels Assigned\High Element	High Grade	POSSCN
CK280	High Quality Professional Development Question Element	HQPD	POSSCN
CK160	Length of Work Day Element	EMIS Contract Info – Hours per day If above is blank, use Hours per day	JOBSCN2 JOBSCN2
CK250	Local Contract Code Element	Job	POSSCN/JOBSCN
CK190	Pay Amount/Rate Element	EMIS Contract Info – Contract amt If above is blank, the amount is calculated	JOBSCN2
CK180	Pay Type Element	calculated	
CK060	Position Code Element	Position Information Code Position Code	POSSCN JOBSCN
CK100	Position FTE Element	Emis Contract Info – FTE Same as Position Information - FTE If above not > 0 use Salary Schedule - FTE	JOBSCN2 POSSCN JOBSCN2
CK130	Position Fund Source Elements	Position Funding Code	POSSCN
CK120	Position Fund Source Percent Element	Position Funding Percent	POSSCN
CK300	Position Separation Date Element	Separation Date	POSSCN
CK230	Position Separation Reason Element	Separation Reason	POSSCN
CK080	Position Start Date Element	Position Information Start	POSSCN
CK070	Position Status Element	Position Information Status	POSSCN
CK140	Position Type Element	Position Information Type	POSSCN
CK290	Qualified Paraprofessional Element	Qualified Paraprofessional	POSSCN
CK170	Scheduled Work Days Element	EMIS Contract Info – Work Days If above is blank, use Work Days	JOBSCN2 JOBSCN2
CK310	Special Education FTE Element	Pos. Info – Spec. Ed FTE	POSSCN
CK150	Type of Appointment Element	Appointment type	POSSCN

EMIS reporting of an employee leaving your district

TERMINATION BASED UPON LAST DAY WORKED—NOT LAST DAY PAID

- **Situation E**: If an employee leaves the district on or after the last day of the 17/18 school year, and works no days in the 18/19 school year, give that employee…
  - o INITIAL Staff and Course Collection (FY19)
    - ▪ Position Status U
    - ▪ Separation Date
    - ▪ Separation Reason
  - o FINAL Staff and Course Collection (FY19)
    - ▪ Same as above
  - o INITIAL Staff and Course Collection (FY20)
    - ▪ Set the employee's Report to EMIS flags to N on POSSCN and DEMSCN
    - ▪ Conceal employee on BIOSCN

- **Situation U**: If an employee works some days in the 18/19 school year and then resigns by the end of the INITIAL Staff and Course Collection (FY19), give that employee…
  - o INITIAL Staff and Course Collection (FY19)
    - ▪ employee's Position Status remains the way it was set on the employee's last day of work
    - ▪ Separation Date
    - ▪ Separation Reason
  - o FINAL Staff and Course Collection (FY19)
    - ▪ Same as above
  - o INITIAL Staff and Course Collection (FY20)
    - ▪ set the employee's Report to EMIS flags to N on POSSCN and DEMSCN
    - ▪ Conceal employee on BIOSCN

- **Situation C**: If an employee leaves the district after the start of the FINAL Staff and Course Collection (FY19) and before the last day of school (or so close to the end of the INITIAL Staff and Course Collection (FY19) that it is difficult to report in the initial), give that employee…
  - o FINAL Staff and Course Collection (FY19)
    - ▪ employee's Position Status remains as it was on the last day of work
    - ▪ Separation Date
    - ▪ Separation Reason
  - o INITIAL Staff and Course Collection (FY20)
    - ▪ set the employee's Report to EMIS flags to N on POSSCN and DEMSCN
    - ▪ Conceal employee on BIOSCN

- **Situation A**: If an employee has a supplemental contract only, worked in the previous school year, and did not return for the current school year…
  - o Set employee's Report to EMIS flags to N on POSSCN and DEMSCN (it's ok that these employees are not reported to ODE with separation date and reason; supplementals are not included in staff missing)

- o Conceal employee on BIOSCN

- **Situation T**: If an employee left your district prior to the last day of school year 17/18 and separation date and reason were reported in Final Staff and Course Collection (FY18), you are finished reporting this person and can now…
    - o Set the Report to EMIS flags on POSSCN and DEMSCN to N.
    - o Conceal employee on BIOSCN