Redesign
<u>FY21 Staff EMIS Checklist for Initial Staff and Course Collection</u>

September 23, 2020

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. <u>Change EMIS Reporting Year to 2021</u>
    a. In Redesign, go to System/Configuration
        i. Click the edit button next to 'EMIS Reporting Configuration'
        ii. Change 'Fiscal Year' to 2021
        iii. Do not change any other fields
2. <u>USPS Staff Records</u>
    Start by updating EMIS related fields in USPS for your current employees. See tables 1 and 2 for a list of the EMIS related USPS fields, and Section 3 of the EMIS Manual for details.
    a. Demographic Records – Table 1
        i. Run **EMIS Demographic Data Report**
            o Verify employee information
            o Pulls in based on Last Paid Date >=7/01/2020
            o Fields can be updated at Core/EMIS Entry/EMIS Employee Entry
            o See step 8 to update Total, Authorized, and Principal Experience fields
    b. Position/Compensation Records – Table 2
        i. Run **EMIS Active Position Report**
            o Verify the status and fields of all ACTIVE positions including position status, code, separation date/reason
            o Fields can be updated at Core/EMIS Entry/EMIS Position Entry
            o See step 4b to report new employees
        ii. Run **EMIS Inactive Position Report**
            o Filter the CSV file to remove any termination dates prior to 7/01/2020
            o Verify the status of all INACTIVE positions
        iii. Run **EMIS Active Non Contract Compensation Report**
            o Verify the 'Reportable to EMIS' flag for all ACTIVE records
        iv. Run **EMIS Inactive Non Contract Compensation**
            o Verify that these shouldn't be reported to EMIS
        v. Run **EMIS Active Contract Compensation Report**
            o Verify all ACTIVE compensation records
            o See step 4a to archive old compensation records
            o See steps 4b and 4c to verify 'Reportable to EMIS' flags for FY21 compensation records
            o See step 9 to update Hours In Day, Contract, Amount, Contract Work Days, and FTE fields

3. <u>Supplemental Jobs</u>
   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

4. <u>Report to EMIS flags</u>
   a. Archive FY20 (and prior) Contract Compensation records. You can mass-archive them by following the Mass Load steps below:
   *Note - If the employee leaves after the FY20 school year, their compensation record cannot be archived until they are done being reported to EMIS
      i. Go to Core/Compensation/Contract Compensations tab
         o From the More option add 'Archived' and 'id' ('id' is at the very top)
           Note After closing the More option, the screen will refresh. You will need to click on the 'Contract Compensations' tab again.
         o Click Report button (next to More) and choose Excel-FieldNames format
      ii. The minimum required columns in the CSV file are:
         o id
         o position.number
         o position.employee.number
         o type
         o whatever field you are changing (in this case, the 'archived' column)
      iii. In the Excel file, delete compensation records that do not need changed
      iv. Under 'archived' column, change "FALSE" to "TRUE"
      v. Save file as CSV (comma delimited)
      vi. In Redesign go to Utilities/Mass Load
         o Click on Choose File and find CSV file from above
         o Importable Entity is 'Compensation'
         o Click Load
   b. You may have added new employees, but to keep them out of the Final Staff and Course Collection (FY20), 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 the Employee Dashboard for Employee, Position, and Compensation
   c. Make sure all FY21 Contract Compensation records are marked as 'Reportable to EMIS'
      i. Go to Core/Compensation
      ii. From the More option, add:
         o 'Compensation Stop Date' under 'Date Range'
         o 'Reportable to EMIS' under the first 'State Reporting'
      iii. Filter 'Compensation Start Date' to a date that will include all of FY21 compensations
         o Example: >=7/01/2020
      iv. Review carefully
      v. Email fiscal.support@noacsc.org to do Mass Change or for Mass Load instructions

5. <u>See pages 7 and 8 for instructions on EMIS reporting of an employee leaving your district.</u>
   a. Consider employees who left during this school year, *and before*

6. Add/Update CC or CJ Records (if applicable to your district)
    a. Add or update the CC or CJ records by going to Core/EMIS Entry
    b. A module has to be turned on for access to the CJ records. Email fiscal.support@noacsc.org to get the EMIS Contractor Module turned on.
    c. Once the records are updated, click the Extract CJ and/or Extract CC button.
    d. **Save the file. It will need to be uploaded into the Data Collector.**

7. Clear out the EMIS Long Term Illness field (CLRATD)
    a. The system does not have the functionality to clear out all Long Term Illness fields at once.
    b. Go to Core/EMIS Entry/Employee Entry
        i. From the More option add Staff Demographics > Long Term Illness
        ii. Filter Long Term Illness with >0 (greater than 0) on the grid
    c. Edit each employee and remove the amount in Long Term Illness
    d. There is a Mass Change option if your district has many employees to change. Contact fiscal.support@noacsc.org for this option.

8. Increment the Experience Fields (MASINC)
    a. Need to increase the number of 'Authorized', 'Principal', and 'Total' Experience on Core/EMIS Entry. These 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. 'Principal' is the EMIS Principal Experience Years element. This includes the total number of years of certificated/licensed educational service as a school leader.
        iv. Go to Core/Employee
            o Add the following from the More option:
                a. Report to EMIS, under General
                b. Hire Date, under Dates
                c. Authorized Experience, under Experience
                d. Principal Experience, under Experience
                e. Total Experience, under Experience
            o Filter grid, Report to EMIS = true
            o Filter grid, Hire Date = <=7/01/20
            o Click Report, choose Excel-FieldNames format, and Generate Report
        v. In the Excel file use formulas to increase the number of years
            o In the empty columns do a formula to add 1 year experience. Example:

	A	B	C	D	E	F	G	H
1	number	reportToEmis	hireD	termina	customFields.authorizedExperience.value	customFields.principalExperience.value	customFields.totalExperience.value	
9	BRIN00003	TRUE	08/01/2017		9	6	9	=E9+1
10	BURG00001	TRUE	04/23/2001		23	0	23	

            o Copy the numbers in the new column and paste as *Values* into the appropriate 'Experience' column
            o Add zeros to blank fields, particularly the Principal Experience fields
            o Save the file as CSV (Comma delimited)
        vi. Go to Utilities/Mass Load

      o Upload the file using **Employees** as the Importable Entity

9. Update EMIS Contract Info (MASEMIS)
 a. EMIS looks first at the Hours In The Day, Contract Amount, Contract Work Days, and FTE fields on Core/Position
 b. If those values are blank, EMIS will use the payroll fields for those values
  i. Hours In Day on Compensation record
  ii. Obligation on Compensation record
  iii. Contract Work Days on Compensation record
  iv. FTE on Position record
 c. If you have any employees who normally need values in the EMIS Contract Info fields, now is the time to enter that data. An example is an employee who 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 is reported to EMIS as one job. In both examples, place the EMIS reportable data in the fields listed above in step b.
 d. Go to Core/Position
  i. From the More option add the following fields to the grid:
   o EMIS Related Information > Reportable to EMIS, Full Time Equivalence, Contract Amount, Contract Work Days, and Hours in The Day
  ii. Filter grid for Report to EMIS = true
  iii. Review data on the grid and make applicable changes to the Compensation or Position records as indicated in step b

10. Notify your EMIS Coordinator that you have staff data ready for Initial Staff and Course Collection (FY21) submission. **Ask your EMIS Coordinator to check <u>both</u> the SIF Zone box <u>and</u> the EMIS Formatted Files box.**
 a. If a CJ or CC Extract was generated in step 6, it will need to be uploaded into the Data Collector at this time.

11. 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. Review reported employee information carefully
 b. Make any contractor-related corrections in Core/EMIS Entry/EMIS Contracted Service tab and then restart the collection

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

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

Table 1 Staff Demographic Record (CI) Data Elements

The table below lists the location of each field within the traditional USPS screens, and the required EMIS reporting period. In **Core/EMIS Entry**, all fields are available under the EMIS Employee Entry and EMIS Position Entry tabs.

Record Field Number	Data Element	USPS Field Name	USPS Screen	Initial L	Final L
CI150	*Absence Days Element*	Calculated	Attendance		√
CI155	*Absence Days/Long-term Illness Element, 15 consecutive days*	Long Term Illness	Employee Entry		√
CI140	*Attendance Days Element*	Calculated	Attendance		√
CI200	*Authorized Teaching Experience Years Element*	Authorized Experience	Employee Entry	√	√
CI070	*Date of Birth Element*	Birth Date	Employee Entry	√	√
CI225	*Early Childhood Education Qualification Element*	ECE Qualification	Employee Entry	√	√
CI100	*Education Level Element*	Degree Type	Employee Entry	√	√
CI050	*Employee ID Element*	EMIS ID	Employee Entry	√	√
CI090	*Gender Element*	Gender	Employee Entry	√	√
CI060	*Name Element*	Employee Name	Employee Entry	√	√
CI080	*Racial/Ethnic Group Element*	Primary Race	Employee Entry	√	√
CI110	*Semester Hours Element*	Semester Hours	Employee Entry	√	√
CI270	*State Staff ID Element*	Credential ID	Employee Entry	√	√
CI210	*Total Experience Years Element*	Total Experience	Employee Entry	√	√
CI330	*Principal Experience Years*	Principal Experience	Employee Entry	√	√

Table 2 Staff Employment Record (CK) Data Elements

The table below lists the location of each field within the traditional USPS screens, and the required EMIS reporting period. In **Core/EMIS Entry**, all fields are available under the EMIS Employee Entry and EMIS Position Entry tabs.

Record Field Number	Data Element	USPS Field Name	USPS Screen	Initial L	Final L
CK220	Assignment Area Element	Assignment Area	Position Entry	√	√
CK090	Building IRN Element	Building IRN	Position Entry	√	√
CK050	Employee ID Element	EMIS ID	Employee Entry	√	√
CK210	Extended Service Element	Extended Service	Position Entry	√	√
CK260	Grade Levels Assigned\ Low Element	Low Grade	Position Entry	√	√
CK270	Grade Levels Assigned\High Element	High Grade	Position Entry	√	√
CK280	High Quality Professional Development Question Element	High Quality Professional Development	Position Entry		√
CK160	Length of Work Day Element	Hours In The Day	Position Entry	√	√
CK250	Local Contract Code Element	Position Number	Position Entry	√	√
CK190	Pay Amount/Rate Element	Contract Amount	Position Entry	√	√
CK180	Pay Type Element	Calculated	Compensation	√	√
CK060	Position Code Element	Position Code	Position Entry	√	√
CK100	Position FTE Element	Full Time Equivalence	Position Entry	√	√
CK130	Position Fund Source Elements	Funding Source Code	Position Entry	√	√
CK120	Position Fund Source Percent Element	Percent	Position Entry	√	√
CK300	Position Separation Date Element	Separation Date	Position Entry	√	√
CK230	Position Separation Reason Element	Separation Reason	Position Entry	√	√
CK080	Position Start Date Element			√	√
CK070	Position Status Element	Position Status	Position Entry	√	√
CK140	Position Type Element	Position Type	Position Entry	√	√
CK290	Qualified Paraprofessional Element	Paraprofessional	Position Entry	√	√
CK170	Scheduled Work Days Element	Contract Work Days	Position Entry	√	√
CK310	Special Education FTE Element	Special Education Full Time Equivalence	Position Entry	√	√
CK150	Type of Appointment Element	State Reporting Appointment Type	Position Entry	√	√

EMIS Reporting of an Employee Leaving your District

*Termination is based upon the last day WORKED, not the last day paid

- **Situation E**: If an employee leaves the district on or after the last day of the 19/20 school year, and works no days in the 20/21 school year, give that employee…
    - INITIAL Staff and Course Collection (FY21)
        - Position Status U
        - Separation Date
        - Separation Reason
    - FINAL Staff and Course Collection (FY21)
        - Same as above
    - INITIAL Staff and Course Collection (FY22)
        - Set the employee's Report to EMIS flags to N on Core/Employee
        - Archive employee on Core/Employee

- **Situation U**: If an employee works some days in the 20/21 school year and then resigns by the end of the INITIAL Staff and Course Collection (FY20), give that employee…
    - INITIAL Staff and Course Collection (FY21)
        - employee's Position Status remains the way it was set on the employee's last day of work
        - Separation Date
        - Separation Reason
    - FINAL Staff and Course Collection (FY21)
        - Same as above
    - INITIAL Staff and Course Collection (FY22)
        - set the employee's Report to EMIS flags to N on Core/Employee
        - Archive employee on Core/Employee

- **Situation C**: If an employee leaves the district after the INITIAL Staff and Course Collection (FY21) closes and before the last day of school (or so close to the end of the INITIAL Staff and Course Collection (FY21) that it is difficult to report in the Initial), give that employee…
    - FINAL Staff and Course Collection (FY21)
        - employee's Position Status remains as it was on the last day of work
        - Separation Date
        - Separation Reason
    - INITIAL Staff and Course Collection (FY22)
        - set the employee's Report to EMIS flags to N on Core/Employee
        - Archive employee on Core/Employee

- **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…
    - Set employee's Report to EMIS flags to N on Core/Position (it's ok that these employees are not reported to ODE with separation date and reason; supplementals are not included in staff missing)
    - Archive employee on Core/Employee

- **Situation T**: If an employee left your district prior to the last day of school year 19/20 and separation date and reason were reported in Final Staff and Course Collection (FY20), you are finished reporting this person and can now…
    - Set the Report to EMIS flags on Core/Employee to N.
    - Archive employee on Core/Employee

Who Should Be Reported (From ODE EMIS Staff Manual):

The following employees are to be reported by EMIS-reporting entities:
*individuals employed by the reporting entity for any portion of the school year.
*individuals or companies contracted by the school district for duties normally performed by school district personnel (e.g., bus drivers, food service staff, and special education therapists).
*individuals who were employed during the current school year but who left prior to the end of the school year.
*individuals who are on leaves of absence.
*substitutes who become the 'teacher of record.'
*individuals employed during the previous year, who are no longer employed, including individuals who resigned over the summer.
*individuals employed through supplemental contracts, including individuals whose only position is a supplemental contract.
*full-time substitute teachers (permanent substitutes) hired as full-time substitutes; should be reported with a position code of "225." [if they have a contract with the district, are on a salary schedule and report to the district for work daily]

DO NOT REPORT the following individuals to EMIS:
*daily (as needed) substitute workers (such as sub bus drivers, cooks, etc.)
*student employees.
*board of education members.
*adult education teachers.
*game officials, ticket takers.
*part-time help.
*volunteers serving in the district.
*daily (as-needed) substitute teachers. [PLEASE NOTE if the substitute becomes a "teacher of record" the reporting requirement will change]