

# **FY21 Staff EMIS Checklist for Initial Staff and Course Collection - Classic**

September 4, 2020

**\*Please initially complete Steps 9, 10 and 11 and then have your EMIS Coordinator Certify & Submit before 10/23/20 to connect to Student Side EMIS\***

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 (for last year's 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 both USPSCN/DEMSCN and USPSCN/POSSCN.

### **4. See Pages 8 & 9 for instructions on EMIS reporting of an employee leaving your district.**

- a. Consider employees who left during this school year and before

### **5. CLRATD (Classic)**

- 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 (Classic)

- 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. **'Principal'** experience is reported as the TOTAL years an individual has served as either a principal or assistant principal (see EMIS manual for more definitions)
  - iv. Type MASCHG at the MENU> prompt and then select the option for MASINC.
    - o Run for the Projection option
    - o Set Appointment Type to 1 for Certified employees. (This is the 'Type of Appt' field on JOBSCN.)
    - o Select only those employees reportable to EMIS.
    - o New employees should not have their years of service incremented, so use the 'Exclude employees based on hire date' prompt to filter them out.
    - o In the 'Fields to increment' section of the screen, enter '1' for Total and Authorized. These are the required fields for EMIS.
    - o Execute and check the report.
  - v. If the report is correct, run MASINC again for the Actual option.
    - o Run date and time: \_\_\_\_\_
  - vi. Be sure to include "Principal Experience Years" (if less than 10 years, report with a leading zero)
  - vii. You have the option of also using MASINC to properly set noncertified staff members' years of experience.

## 7. MASEMIS (Classic)

- 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. \*Please remember this only changes with manual adjustments, so if you have information in someone's JOBSCN now for EMIS Contract Info for last year, it will need to be changed for this year; you do not need to use this field at all if the payroll information on the left side of JOBSCN is correct for what you want to report.
- 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 FY21 amounts. Don't run this program in actual mode. Let us know if you have anyone outside these situations with values on the report.

## 8. **PERDET (Classic)**

This 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 = 2021
- 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.

### **FOR YOUR FIRST RUN, IT IS \*SUGGESTED\* YOU USE THESE SELECTIONS:**

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

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): **Y** [for reportable to EMIS]

### **FOR YOUR SECOND RUN, IT IS \*SUGGESTED\* YOU USE THESE SELECTIONS:**

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

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): **N** [for not reportable to EMIS]

### **FOR YOUR THIRD RUN, IT IS \*SUGGESTED\* YOU USE THESE SELECTIONS:**

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

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)? **Y**

Select employees reportable to EMIS, Not Reportable, or Both? (Y,N,B): **Y** [for reportable to EMIS]

***Running these three options provides you with the following:***

- 1) First run identifies who you have flagged to report to EMIS and you can check it with your staff roster***
- 2) Second run helps you double-check to see if someone is accidentally flagged as an N and should be a Y***
- 3) Third run narrows down your search to only those employees with errors so you know what needs to be fixed.***

***After you fix errors from the third run, you can just repeat the third run until you are error-free. Then you are ready to move on.***

## 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: *
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! - 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 (Classic)

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 2021
- e. Are extended service days included in the work days in contract: *This prompt is no longer relevant so you may bypass this prompt.*
- 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> 2021

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 (Classic)**

**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 (FY21) 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.

**Please note the FINAL staff EMIS reporting in June 2021 must be completed prior to running your first payroll in July 2021**

Table 1 EMIS Attendance/Absence Day Rules (Counts may be in partial days)

Type of Day	Symbol	From	Effect on Attendance	Effect on Absence
Work Day	W	Job Calendar	Add 1	No Adjustment
Holiday	H	Job Calendar	Deduct Length	No Adjustment
Calamity	C	Job Calendar	Deduct Length	No Adjustment
Make-up	M	Job Calendar	Add 1	No Adjustment
Attendance	AT	ATDSCN	Add Length	No Adjustment
Substitute	SB	ATDSCN	Add Length	No Adjustment
Vacation	VA	ATDSCN	No Adjustment	No Adjustment
Sick	SI	ATDSCN	Deduct Length	Add Length
Personal	PL	ATDSCN	Deduct Length	Add Length
Professional Leave	PR	ATDSCN	No Adjustment	No Adjustment
Dock Units	DO	ATDSCN	Deduct Length	Add Length
Jury Duty	JD	ATDSCN	Deduct Length	Add Length
Military	MI	ATDSCN	Deduct Length	Add Length
Calamity	CA	ATDSCN	Deduct Length	No Adjustment
Holiday	HO	ATDSCN	Deduct Length	No Adjustment
Other	OT	ATDSCN	Deduct Length	Add Length

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

<b>Record Field Number</b>	<b>Data Element</b>	<b>USPS Field Name</b>	<b>USPS Screen</b>
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 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 POSSCN and DEMSCN
    - Conceal employee on BIOSCN
  
- **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 (FY21), 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 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 (FY21) and before the last day of school (or so close to the end of the INITIAL Staff and Course Collection (FY20) 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 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...
  - 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; supplemental contracts are not included in staff missing)
  - Conceal employee on BIOSCN

- **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 POSSCN and DEMSCN to N.
  - Conceal employee on BIOSCN

**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]