

# **FY21 Staff EMIS Checklist for FINAL Staff and Course Collection Classic**

February 8, 2021

**Please finish Final Period L \*BEFORE\* you close fiscal year-end payroll!**

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 new employees and those who have had changes in the school year. 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

***Note: The following instructions (3) are required for this collection, but were not required in the Initial Staff and Course Collection FY21.***

### **3. Long-Term Illness**

Start by running ABSRPT/ABS101, run for Detail/Transaction Type AB, Date Selection 07/01/2020 – 06/30/2021, and Category SI (sick leave) to get a general list of all absences for the year for employees. For those employees with fifteen (15) or more total days of absences, look for fifteen (15) or more CONSECUTIVE work days of absence. NOTE: In order to clear out previous long-term illness entries, you can use the program CLRATD to clear that out.

- a. You may include additional categories on the ABS101 report if you permit employees to use sick, personal and dock time to get through a long-term absence such as maternity leave. Do not count vacation days or holidays.

- b. Long-term illness is **fifteen (15) or more consecutive days**.  
*For example, if an employee is out for twenty (20) consecutive days near the beginning of the school year, fifteen (15) consecutive days later in the school year, and five (5) single days of absences throughout the school year, the Long-Term Illness value is thirty-five (35) and the absence days value is forty (40).*
- c. Use USPSCN/BIOSCN to enter this value **OR** use USPSWEB and go to EMIS/EMIS entry screen, Staff Demographics to enter long-term illness values.
- d. Absence & Attendance Days: The Data Collector will calculate these values automatically if you maintain absences in USPS. **HOWEVER**, if you do not use USPS for your absences, you'll need to hand-enter the totals in:
  - i. USPSCN/ATDSCN using AD ET for attendance and AD EB for absences; or
  - ii. USPSWeb using Attendance, New, Transaction Type, Adjustment and Category EMIS Attendance/EMIS Absence.
- e. High Quality Professional Development (HQPD): Enter this value in the HQPD field in USPS/POSSCN **OR** go to USPSWeb using EMIS, EMIS Entry Screen and then Staff Employment.

**4. See Pages 10 & 11 for instructions on EMIS reporting of an employee leaving your district.**

- a. Consider employees who left during this school year and before
- b. Remember that employees who left your school district this school year need to be reported through the end of this Final Staff and Course Collection (FY21)

**5. USPEMS/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.***

See the PERDET example on the next page.

DATE: XX/XX/XX  
TIME: 8:47 am

SAMPLE CITY SCHOOL DISTRICT  
EMIS DATA DETAIL LISTING WITH ERROR CHECKING

PAGE: 1  
(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)
```

## 6. 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. calendar stop date
  - iii. 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

#### 7. **FNLUSPDC**

This program will load USPEMX.SEQ (and USPEMX\_EMISR.SEQ if you have contractor data) into the Data Collector.

- a. **To do this, at the MENU> prompt type FNLUSPDC.**
  - 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.**
8. **Notify your EMIS Coordinator** that you have staff data ready for Final Staff and Course Collection (FY21) submission. For submission of the Final Staff and Course Collection, ask your EMIS Coordinator to check the EMIS Formatted Files box (**the SIF zone box is UNCHECKED when doing the Spring Final Collection**). Treasurers can also submit this if they wish (and payroll specialists may also submit this if they have been given access to do so.)
9. **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 **OR go to the Data Collector and click on the links for Level 1 and Level 2 staff related errors.** Level 1 and Level 2 errors will indicate the codes of CK for Employment records and CI for Demographic errors.
- a. Make any contractor related corrections in USPSWeb and then start again at Step #6.
  - b. If your corrections are not related to contractor records, make them as needed in the payroll screens (USPSCN or USPSweb) and start again at Step #8.
10. **Login to the Secure Data Center** via your OH | ID (formerly SAFE account) and in 'Reports for Analysis' to review the 'Teachers & Staff' reports.
11. **Be sure** to monitor your MOE periodically and especially at the end of the fiscal year.



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

**Please do not conceal any employee until \*after\* you have reported the termination date/reason on the Period L Collection!**

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

| <b>Type of Day</b> | <b>Symbol</b> | <b>From</b>  | <b>Effect on Attendance</b> | <b>Effect on Absence</b> |
|--------------------|---------------|--------------|-----------------------------|--------------------------|
| 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.

| <b>Record Field Number</b> | <b>Data Element</b>  | <b>USPS Field Name</b>   | <b>USPS Screen</b> |
|----------------------------|--|--|--------------------|
| 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<br>If above is blank, use Hours per day                                   | JOBSCN2<br>JOBSCN2           |
| CK250                      | Local Contract Code Element                            | Job  | POSSCN/JOBS<br>CN            |
| CK190                      | Pay Amount/Rate Element                                | EMIS Contract Info – Contract amt<br>If above is blank, the amount is calculated                             | JOBSCN2                      |
| CK180                      | Pay Type Element                                       | calculated   |                              |
| CK060                      | Position Code Element                                  | Position Information Code<br>Position Code   | POSSCN<br>JOBSCN             |
| CK100                      | Position FTE Element                                   | EMIS Contract Info – FTE<br>Same as Position Information - FTE<br>If above not > 0 use Salary Schedule - FTE | JOBSCN2<br>POSSCN<br>JOBSCN2 |
| CK130                      | Position Fund Source Elements                          | Position Funding Code  | POSSCN                       |
| CK120                      | Position Fund Source Percent Element                   | Position Funding Percent   | POSSCN                       |



| Record Field Number | Data Element                       | USPS Field Name  | USPS Screen        |
|---------------------|------------------------------------|--|--------------------|
| 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<br>If above is blank, use Work Days | JOBSCN2<br>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 (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 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]