FY 22 Initial L Reporting USPS-R EMIS Checklist

EMIS Staff and Course Collection – Initial FY22 currently has an open date of 9/23/21 and close date of 1/28/22 <u>Processing-Schedule-FY22-08-12-2021.pdf.aspx (ohio.gov)</u>. Even though this collection doesn't close until January, a collection will need to be run early in the collection period to load Staff Data so that the Student side of EMIS can update their data. You can go back and finalize all of the Staff data in January and Certify and Submit again at that time.

1.____ Update the *EMIS Configuration Fiscal Year* (*Done by ITC this year, but you can review here*) Go to *System>Configuration>EMIS Reporting Configuration*.

2.____ARCHIVE prior year compensations. <u>CAN USE EITHER MASS LOAD or MASS CHANGE</u> (Remember to leave those who will still need to be reported to EMIS with separation date and reason if they weren't reported as leaving yet.)

- A. Mass Load option Go to Core/Compensation/Contract Compensations tab
 - From the More option: add 'Archived' under Date Range and 'Code' under Compensation
 - *Note* After closing the More option, the screen will refresh. You will need to click on the 'Contract Compensations' tab again.
 - Filter Description Column (if filled in with FY21 or something indicating FY21 records)
 - Click Report button (next to More) and choose Excel-FieldNames format
 - The minimum required columns in the CSV file are:
 - o code
 - o position.number
 - o position.employee.number
 - o type
 - whatever field you are changing (in this case, the 'archived' column)
 - In the Excel file, delete any compensation records that do NOT need changed
 - Under 'archived' column, change "FALSE" to "TRUE"
 - Save file as CSV (comma delimited)
 - In Redesign go to Utilities/Mass Load
 - Click on Choose File and find CSV file from above
 - Importable Entity is 'Compensation'
 - Click Load

B. Mass Change option (if your district is using the Mass Change Module) in Contract Compensations or Non Contract Compensations. Filter using Compensation Stop Date or Description to pull in all compensations for prior fiscal year. Using Mass Change select the Archived Employee definition. (This definition can be imported in from the Redesign Shared Reports or Mass Change Definitions- <u>https://wiki.ssdt-</u> <u>ohio.org/pages/viewpage.action?pageId=82151184</u> Select Execution Mode. Click Submit Mass Change.

This will archive the old contracts and prevent them from pulling into the EMIS collection

2. ____ Make sure all FY22 Contract Compensation records are marked as 'Reportable to EMIS'

- Go to Core/Compensation
- From the More option, add:
 - 'Compensation Stop Date' under 'Date Range'
 - o 'Reportable to EMIS' under the first 'State Reporting'
- Filter 'Compensation Start Date' to a date that will include all of FY22 compensations

 Example: >=7/01/2021
- Review carefully

3. ____ Create the <u>EMIS Demographic Data Report</u> from **Reports/Report Manager** or create a report from the **Employee** grid **Report** option to verify **Employee Demographic EMIS** (**CI**) elements will be included from the **Employee** records when the SIF data collection is processed. http://education.ohio.gov/getattachment/Topics/Data/EMIS/EMIS-Documentation/Current-EMIS-Manual/3-3-Staff-Demographic-CI-Record-v7-0.pdf.aspx?lang=en-US

Verify Identification- Number, SSN, Credential ID

Name-Last Name, First Name, Middle Name, Suffix

Dates- Birth Date, Last Paid Date, Termination Date

General- Gender, Report to EMIS

Experience- Authorized Experience, Principal Experience, Total Experience

Race- Primary Race, American Indian Alaska Native, Asian, Black, Hispanic Latino Option, Native Hawaiian Pacific Islander, White

State Reporting- ECE Qualification, Degree Type, Non-Certificate Employer ID, Semester Hours

| Record Field | Data Element | | |
|---------------------|---|--------------|--------------|
| Number | | Initial L | Final L |
| CI150 | Absence Days Element | | \checkmark |
| CI155 | Absence Days/Long-term Illness Element | | \checkmark |
| CI140 | Attendance Days Element | | \checkmark |
| CI200 | Authorized Teaching Experience Years Element | \checkmark | \checkmark |
| CI070 | Date of Birth Element | \checkmark | \checkmark |
| CI225 | Early Childhood Education Qualification Element | 1 | \checkmark |
| CI100 | Education Level Element | 1 | \checkmark |
| CI290 | First Name | 1 | V |
| CI090 | Gender Element | 1 | \checkmark |
| CI310 | Last Name | 1 | \checkmark |
| CI300 | Middle Name | V | V |
| CI280 | Prefix Name | V | V |
| CI330 | Principal Experience Years | V | V |
| CI080 | Racial/Ethnic Group Element | 1 | \checkmark |
| CI110 | Semester Hours Element | V | V |
| CI270 | State Staff ID Element | \checkmark | \checkmark |
| CI320 | Suffix Name | \checkmark | \checkmark |
| CI210 | Total Experience Years Element | 1 | \checkmark |

4. _____ Create the **Position** and **Compensation Reports** from **Reports/Report Manager** or create **Reports** from the **Position** and **Compensation** grid to verify **Staff Employment EMIS** (**CK**) elements will be included from the **Position** or **Compensation** records when the SIF data collection is processed-http://education.ohio.gov/getattachment/Topics/Data/EMIS/EMIS-Documentation/Current-EMIS-Manual/3-4-Staff-Employment-CK-Record-v8-0.pdf.aspx?lang=en-US

EMIS Active Position Report-

Verify **Position #, Position Description, Job Status**

Employee/Identification-Number,

Employee/Name- Last Name, First Name,

Employee-Extended Service, FTE,

EMIS Related Information-**Reportable to EMIS**, **Position Code**, **State Reporting Appointment Type**, **Position Type**, **Position Status**, **Special Education FTE**, Low Grade, Separation Reason, Paraprofessional, High Quality Professional Development, High Grade, Separation Date, Paraprofessional Hire Date, Building IRN

Funding Source-Assignment Area, Funding Source Code 1, Percent 1, Funding Source Code 2, Percent 2, Funding Source 3, Percent 3,

EMIS Inactive Position Report (After creating csv can filter to remove any Termination date before current fiscal year.)

Verify **Position #**, **Position Description**, **Job Status**

Identification-Number

Name- Last Name, First Name

Dates- Termination Date

Employee-Extended Service, FTE

EMIS Related Information-Reportable to EMIS, Position Code, State Reporting Appointment Type, Position Type, Position Status, Special Education FTE, Low Grade, Separation Reason, Paraprofessional, High Quality Professional Development, High Grade, Separation Date, Paraprofessional Hire Date, Building IRN

Funding Source-Assignment Area, Funding Source Code 1, Percent 1, Funding Source Code 2, Percent 2, Funding Source 3, Percent 3,

Position Date- Stop Date

EMIS Active Contract Compensation Report

Compensation- Type, Unit Amount, Contract Work Days, Hours in Day

Date Range- Compensation Start Date, Compensation Stop Date

State Reporting- Reportable to EMIS

Position- Position #, Position Description, Job Status

Identification- Number

Name- Last Name, First Name

Contract- Contact Amount, Pays in Contract

EMIS Active Non Contract Compensation Report

Compensation-Type, Pay Unit, Unit Amount, Hours in Day

Date Range- Compensation Start Date, Compensation Stop Date

State Reporting- Reportable to EMIS

Position- Position #, Position Description, Job Status

Identification-Number

Name- Last Name, First Name

EMIS Inactive Non Contract Compensation Report

Compensation-Type, Pay Unit, Unit Amount, Hours in Day

Date Range- Compensation Start Date, Compensation Stop Date

State Reporting- Reportable to EMIS

Position- Position #, Position Description, Job Status

Identification-Number

Name- Last Name, First Name

The Staff Employment (CK) Record and the relevant elements are to be reported as follows.

| Record Field | Data Element | Initial L | Final L |
|---------------------|--|--------------|--------------|
| Number | | | |
| CK220 | Assignment Area Element | \checkmark | \checkmark |
| CK090 | Building IRN Element | \checkmark | \checkmark |
| CK050 | Employee ID Element | \checkmark | \checkmark |
| CK210 | Extended Service Element | \checkmark | \checkmark |
| CK260 | Grade Levels Assigned\Low Element | \checkmark | \checkmark |
| CK270 | Grade Levels Assigned\High Element | \checkmark | \checkmark |
| CK280 | High Quality Professional Development Question Element | | \checkmark |
| CK160 | Length of Work Day Element | \checkmark | \checkmark |
| CK250 | Local Contract Code Element | \checkmark | \checkmark |
| CK190 | Pay Amount/Rate Element | \checkmark | \checkmark |
| CK180 | Pay Type Element | \checkmark | \checkmark |
| CK060 | Position Code Element | \checkmark | \checkmark |
| CK100 | Position FTE Element | \checkmark | \checkmark |
| CK130 | Position Fund Source Elements | \checkmark | \checkmark |
| CK120 | Position Fund Source Percent Element | \checkmark | \checkmark |
| CK300 | Position Separation Date Element | \checkmark | \checkmark |
| CK230 | Position Separation Reason Element | \checkmark | \checkmark |
| CK080 | Position Start Date Element | \checkmark | \checkmark |
| CK070 | Position Status Element | \checkmark | \checkmark |
| CK140 | Position Type Element | \checkmark | \checkmark |
| CK290 | Qualified Paraprofessional Element | \checkmark | \checkmark |
| CK170 | Scheduled Work Days Element | \checkmark | \checkmark |
| CK310 | Special Education FTE Element | \checkmark | \checkmark |
| CK150 | Type of Appointment Element | \checkmark | V |

5._____ If a district has or needs to have CC or CJ records, go to *Core>EMIS Entry* option and add or update the respective records.

6._____ If CJ records are required, this module will need to be turned on by the ITC through *System>Modules>EMIS Contractor Module*.

7._____ Once all data has been added successfully to the records, click *the Extract CJ or Extract CC* record option within the CC or CJ records.

8_____ Save the **CC** or **CJ** file to your desktop or a folder of your choosing. This file will then need to be either uploaded to the data collector by the payroll employee or sent to their EMIS coordinator for uploading.

9____ Clearing Long Term Illness data from last fiscal year

1. Filter Employee grid and manually go into each employee to delete, if you don't have many.

OR

- 2. Use Mass Change to clear out Long Term Illness
- *Mass Change* feature will need to be turned on.
- Go to *Core>Employee*.
- If you wish to filter for any long term illness employees on the grid, click *More* and under *State Reporting* click **Long Term Illness**. You can then filter the **Long Term Illness** field entering on the grid >0.00.
- You will then click on the *Mass Change*
- Go to the bottom of the screen and chose *Execution mode*.
- Go to *Load Definition* and choose from the drop down *Clear EMIS Long Term Illness*.
- Click Submit Mass Change

10.____ Incrementing the years of experience for employee:

Mass Load

- On your Employee grid from More choose Number, Last Name, First Name, Authorized Experience, Total Experience, and Terminated Date
- Go to the *Advance Query* and choose termination date and *Operation=IS_NULL* and then click *Apply Query*.
- You can then remove the termination Date from the grid or it can be removed from your csv file later.
- Click on *Reports*
- For *Format* choose from the drop down option *Excel-FieldNames*
- Default report name is Employee Report. Can be changed if desired
- Click Generate Report
- Save report to desktop or a folder of your choosing
- Using a formula in excel you can update the years of experience.
- If you did not already do so remove any Termination date records then remove the Termination Date column from the csv file

- Save the file as a CSV
- Using *Utilities/Mass Load* locate your file and then choose *Employees* as the Importable Entity
- Click *Load*

Mass Change The district can import this Mass Change definition-- <u>Increment Experience.mcd-</u> json into Employee/Mass Change.

a. To import the file in Click on the Employee.
 Import Definition

• In Maintenance Mode under Definition Name click the

button

- Find and click on the file to import in and then click
- Go back to the Employee records. Go to *Advance Query* and choose termination date and *Operation=IS_NULL* and then click *Apply Query*. Then filter the data by

🗸 Save

- Last Paid Date > MM/DD/YYYY, Total Experience >0.00 and Authorized Experience >0.00 on the grid to pull all employees you wish to increment Authorized and Total Experience years for.
- Click on the Mass Change button.
- Under Choose Mode select the Execution option
- Create a "Before Mass Change" report.
- Under the Load Definition field from the drop down find the **Increment Experience** definition and click on it.

Submit Mass Change

- Click the
- A message will display telling you how many records were updated.
- Under Employees you can click on the with the years of experience listed.

***NOTE* Principal Years of Experience** should be manually updated for any employee that fall under the Principal category.

11.____ Clear or Replace any previous fiscal year value from the EMIS override fields. Go to Positions under EMIS Related Information - Contract Amount/Contract Work Days/EMIS Override Hours In the Day or you can use Mass Load creating a spreadsheet using the format 'Excel-FieldNames' from the Position grid, including Number, Pos#, Contract Amount, Contract Work Days, Hours In the Day.

Any questions on EMIS related fields, please click go to the EMIS Entry documentation.

12.____ Notify your EMIS Coordinator that you have staff data ready for Initial Staff and Course Collection (FY22) submission. Ask your EMIS Coordinator to check both the SIF Zone box and the EMIS Formatted Files box.

a. If a CJ or CC Extract was generated, it will need to be uploaded into the Data Collector before running collection. These are not pulled in and have to be uploaded.

13._____ Ask your EMIS Coordinator for a copy of any Level 1 or Level 2 staff related errors, along with any Staff Missing in the Preview/Review option.

a. Make employee data changes and they will pull in with the next collection (both SIF and EMIS boxes checked).

b. Make any contractor-related corrections in Core/EMIS Entry/EMIS Contracted Service tabs and re-extract, re-load CC or CJ files before running collection again.

14. ____ Login to the Secure Data Center (via your OH|ID account) and review staff reports.

As always, please contact us at <u>fiscal.support@noacsc.org</u> if any questions.

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 20/21 school year, and works no days in the 21/22 school year, give that employee...
 - INITIAL Staff and Course Collection (FY22)
 - Position Status U
 - Separation Date
 - Separation Reason
 - FINAL Staff and Course Collection (FY22)
 - Same as above
 - INITIAL Staff and Course Collection (FY23)
 - 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 21/22 school year and then resigns by the end of the INITIAL Staff and Course Collection (FY22), give that employee...
 - INITIAL Staff and Course Collection (FY22)
 - 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 (FY22)

- Same as above
- INITIAL Staff and Course Collection (FY23)
 - 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 (FY22) closes and before the last day of school (or so close to the end of the INITIAL Staff and Course Collection (FY22) that it is difficult to report in the Initial), give that employee...
 - FINAL Staff and Course Collection (FY22)
 - employee's Position Status remains as it was on the last day of work
 - Separation Date
 - Separation Reason
 - INITIAL Staff and Course Collection (FY23)
 - 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 20/21 and separation date and reason were reported in Final Staff and Course Collection (FY21), 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.

*<u>full-time</u> 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.]