

FY 23 Initial L Reporting USPS-R EMIS Checklist

EMIS Staff and Course Collection – Initial FY23 currently has an open date of 9/8/2022 and close date of 1/31/23 <https://education.ohio.gov/Topics/Data/EMIS/Reporting-Responsibilities/EMIS-Data-Collection-Calendars> 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 to 2023* - Go to *System>Configuration>EMIS Reporting Configuration*. This is what indicates to the Data Collector which Fiscal Year data to use.

2. ____ **ARCHIVE** prior year compensations. **CAN USE EITHER MASS LOAD or MASS CHANGE**
****Prior year compensations can be archived each year after the Final Period L collection closes in early August.** If an employee left over the summer months or was not reported as separated in the prior fiscal year, enter a **Separation Date** and **Separation Reason** on the **Position** record, for the new fiscal year. This record will need to be reported to EMIS for the entire Fiscal Year and the employee cannot be archived until the Final L reporting has taken place for the fiscal year.

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:
 - code
 - position.number
 - position.employee.number
 - 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 <https://wiki.ssd-ohio.org/pages/viewpage.action?pageId=82151184> Select **Execution Mode**. Click **Submit Mass Change**.

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

- 3.____ Make sure all **FY23 Contract Compensation records are marked as ‘Reportable to EMIS’**
- Go to Core/Compensation
 - From the More option, add:
 - ‘Compensation Stop Date’ under ‘Date Range’
 - ‘Reportable to EMIS’ under the first ‘State Reporting’
 - Filter ‘Compensation Start Date’ to a date that will include all FY23 compensations
 - Example: >=7/01/2022
 - It is also helpful to add FY23 to the Description fields on the Compensations and use for sorting.
 - Review carefully

4.____ Create the [EMIS Demographic Data Report](#) 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 Number	Data Element	Initial L	Final L
CI150	Absence Days Element		√
CI155	Absence Days/Long-term Illness Element		√
CI140	Attendance Days Element		√
CI200	Authorized Teaching Experience Years Element	√	√
CI070	Date of Birth Element	√	√
CI225	Early Childhood Education Qualification Element	√	√
CI100	Education Level Element	√	√
CI290	First Name	√	√
CI090	Gender Element	√	√
CI310	Last Name	√	√
CI300	Middle Name	√	√
CI280	Prefix Name	√	√
CI330	Principal Experience Years	√	√
CI080	Racial/Ethnic Group Element	√	√
CI110	Semester Hours Element	√	√
CI270	State Staff ID Element	√	√
CI320	Suffix Name	√	√
CI210	Total Experience Years Element	√	√

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

6. ____ 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.

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

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

9. ____ 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.

10. ____ **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 if it isn't already.
- Go to *Core>Employee*.

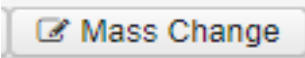
- If you wish to filter for any long term illness employees on the grid, click **More** and under **State Reporting** click **Long Term Illness**. You can then filter the **Long Term Illness** field entering on the grid >0.00.
- You will then click on the **Mass Change**
- Go to the bottom of the screen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


11. **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 **Advanced 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 **Report**
- 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 records with Termination date 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 **Employee** as the Importable Entity
- Click **Load**

Mass Change The district can import this Mass Change definition— [https://wiki.ssd-ohio.org/pages/viewpage.action?pageId=101057422&preview=/101057422/134810177/Increment%20Experience%20v2%20\(1\).mcd-json](https://wiki.ssd-ohio.org/pages/viewpage.action?pageId=101057422&preview=/101057422/134810177/Increment%20Experience%20v2%20(1).mcd-json) into Employee/Mass Change.

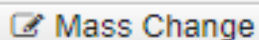
- a. To import the file in Click on the  button in Employee.

- 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. Under the More options, add Termination Date and Last Paid Date to the grid (under Dates). Also add Total Experience and Authorized Experience (under Experience).

- Go to **Advanced Query** and choose termination date and **Operation=IS_NULL** and then click **Apply Query**. Then filter the data by
- 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.

 **Mass Change**

- Click on the **Mass Change** button.
- Under Choose Mode select the Execution option
- Click the Report button to get a PDF report from the grid before doing the Mass Change, so that you can do Before/After comparison
- 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  **Report** button and create a report with the years of experience listed. This is your After report for comparison.

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

12. **Clear or Replace any previous fiscal year value from the EMIS Related Information fields. This information over-rides the information from the Compensation record. The EMIS Related fields are used for Non-Contract record reporting and reporting of split jobs, ex: Art teacher for Elementary and High School. Also used to Report total Contract information when Mid-Year Contract changes have been made.**

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.

13. **Notify your EMIS Coordinator** that you have staff data ready for Initial Staff and Course Collection (FY23) submission. Ask your EMIS Coordinator to **check both the SIF Zone box (the collection is pulling from the fiscal year you have set in EMIS Configuration) 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.

14. 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 formatted files 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.

15. ____ **Notify Treasurer** they can Log into OH | ID Account and review staff reports.

As always, please contact us at fiscal.support@noacsc.org 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 1:** If an employee leaves the district on or after the last day of the 21/22 school year, and works no days in the 22/23 school year, give that employee...
 - INITIAL Staff and Course Collection (FY23)
 - Position Status U
 - Separation Date
 - Separation Reason
 - FINAL Staff and Course Collection (FY23)
 - Same as above
 - INITIAL Staff and Course Collection (FY24)
 - Set the employee's Report to EMIS flags to N on Core/Employee
 - Archive employee on Core/Employee
- **Situation 2:** If an employee works some days in the 22/23 school year and then resigns by the end of the INITIAL Staff and Course Collection (FY23), give that employee...
 - INITIAL Staff and Course Collection (FY23)
 - 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 (FY23)
 - Same as above
 - INITIAL Staff and Course Collection (FY24)
 - set the employee's Report to EMIS flags to N on Core/Employee
 - Archive employee on Core/Employee
- **Situation 3:** If an employee leaves the district after the INITIAL Staff and Course Collection (FY23) closes and before the last day of school (or so close to the end of the INITIAL Staff and Course Collection (FY23) that it is difficult to report in the Initial), give that employee...
 - FINAL Staff and Course Collection (FY23)
 - employee's Position Status remains as it was on the last day of work
 - Separation Date
 - Separation Reason
 - INITIAL Staff and Course Collection (FY24)
 - set the employee's Report to EMIS flags to N on Core/Employee
 - Archive employee on Core/Employee
- **Situation 4:** 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 5:** If an employee left your district prior to the last day of school year 21/22 and separation date and reason were reported in Final Staff and Course Collection (FY22), 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.]