

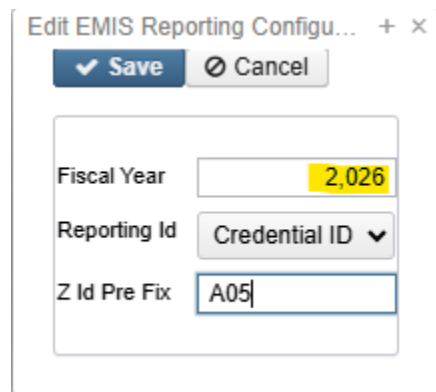
FY 26 Initial Staff and Course Collection (L)

Collection open until 1/28/2026

- There are *three* Report to EMIS flags that determine how information is being reported.
 - **Employee**>General>Report to EMIS.
 - **Position**>EMIS Related Information>Reportable to EMIS.
 - **Compensation**>State Reporting>Reportable to EMIS.
- By default, Archived records are not included in the EMIS collection.
- EMIS Manual click [here](#)

1.____ Update the EMIS Configuration Fiscal Year.

- Go to System>Configuration>EMIS Reporting Configuration.
- Update the Fiscal Year.
- Click Save.



2.____ **Archive** all prior year compensations using Mass Change option in Contract Compensation (or use Mass Load below). This will archive the old contracts and prevent them from being included in the EMIS collection.

NOTE: If a district isn't currently using Mass Change (Mass Change Module is not Enabled and/or Mass Change access not added to a user) but would like to do so, please fill out a new USPS Access Form to Update Existing account and Add Mass Change - [Redesign Access Form \(noacsc.org\)](https://noacsc.org)

- Filter using Compensation Stop Date or Description to pull in all Compensations for prior fiscal year into the grid.
- IT IS GENERALLY RECOMMENDED TO RUN A REPORT FROM THE GRID *BEFORE* ANY MASS CHANGE. Click Report button, Format: PDF, Generate
- Using **Mass Change** select the **Archived Employee** definition.
 - This definition can be imported by clicking [here](#) or from the Redesign Shared Reports or Mass Change Definitions.
 - Save and Name the Definition. It will be added to the dropdown and saved for future use.
- Select Execution Mode.
- Click Submit Mass Change.

Choose mode:
☒ Maintenance Mode
☐ Execution Mode

Load Definition
 Archive Old Compensation Record

Script Parameters

Name	Default Value

Add Parameter row

Script Definition (Normal Mode)

Property	New Value
archived	true

Add property row

Switch to Advanced Mode

Definition Name
 Archive Old Compensation Record

Save Download Definition

Import Definition

Clear Definition

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 Compensation' tab again.
- Filter Description Column for FY
- 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 USPS go to Utilities/Mass Load
- Click on Choose File and find CSV file from above
- Importable Entity is 'Compensation'
- Click Load

3.____ **Clear long term illness** information from the last fiscal year.

- Clear manually.
 - Go to Core>Employee.
 - Click More and under State Reporting add Long-Term Illness column.
 - Filter for any employees that have a value in the Long-Term Illness field,
 - Filter the Long-Term Illness field entering >0.00 in the filter field.
 - Click the Edit icon and clear the value in the Long-Term Illness field
 - Click Save.
 - Move to the next employee in the list and repeat the steps above.
- **OR** Clear using Mass Change – If you have more than you want to do individually.
 - Go to Core>Employee.
 - Click More and under State Reporting click Long Term Illness.
 - Filter for any employees that have a value in the Long-Term Illness field,
 - Filter the Long-Term Illness field entering >0.00 in the filter field.
 - Click Mass Change.
 - Select Execution MDEW.
 - Under Load Definition, select Clear EMIS Long Term Illness.
 - Click Submit Mass Change.

4.____ **Incrementing** the Employee>Total Experience, Authorized Experience, and Principal Experience fields. Keep in mind, employees hired in the new fiscal year should **NOT** receive a year of experience until the next fiscal year, after completing one Full Year of employment.

- Use Mass Change to update both Authorized Experience **and** Total Experience fields.
 - Download the Mass Change definition: [Increment Experience.mcd-json](#).
 - Go to Core>Employee.
 - Filter the grid to include only those records you are wishing to update. If you don't have Experience Years on your Grid, go to the More option and add those columns.
 - Go to Advance Query and choose termination date and Operation=IS_NULL.

Employees

The screenshot shows the 'Employees' grid interface. On the left, the 'Properties' pane lists various fields: Report To Emis, Retire System Experience, Secondary Email Address, Semester Hours, Ssn, Termination Date, Total Experience, Version, Ytd Applicable Gross, Ytd Gross, and Ytd Net. The 'Termination Date' field is highlighted. The main grid area shows a filter for 'Termination Date' with the operation 'Is_Null' selected. Below the grid are buttons for 'Load Saved Query', 'Enter Query Name', and 'Save Query'.

- 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.
- Click Mass Change.
- Select Import Definition. Browse locate the Increment Experience.mcd-json file on your computer (most likely in Downloads folder if you didn't save somewhere specifically) Import, type in a name and Save
- Select Execution MDEW.
- Under Load Definition, select Increment Experience.
- Click Submit Mass Change.
- **OR** Use Mass Change to update **only** the Total Experience field. This is only needed if you update Total years on those who don't also have Experience Years. Some districts keep track of Total for everyone, not just Teachers/Principals. DEW only requires Experience Years for Teachers/Principals. See EMIS Manual for details.
 - Download the Mass Change definition: [Increment Total Experience.mcd-json](#)
 - Go to Core>Employee.
 - Filter the grid to include only those records you are wishing to update.
 - Go to Advance Query and choose termination date and Operation=IS_NULL.
 - Click Apply Query.
 - Then filter the data by Total Experience >0.00 and Last Paid Date > MM/DD/YYYY.
 - Click Mass Change.
 - Select Import Definition. Browse & locate the Increment Total Experience.mcd-json file on your computer. Save
 - Select Execution MDEW.
 - Under Load Definition, select Increment Total Experience.
 - Click Submit Mass Change.

OR Mass Load

Use Utilities>Mass Load to update both Authorized Experience and Total Experience fields.

- Create load file.
 - Go to Core>Employee.
 - From the Employee grid, click More and add the following to the Employee grid:
 - Number
 - Last Name
 - First Name
 - Authorized Experience
 - Total Experience
 - Terminated Date
 - Go to the Advance Query. Choose Termination Date and Operation=IS_NULL. Click Apply Query.
 - Remove the Termination Date from the grid or it can be removed from your file later.
 - Click Reports.
 - Format = Excel-FieldNames (scroll to bottom). Check Mass Load documentation for column names/headers needed.
<https://mcoecn.atlassian.net/wiki/spaces/uspdocs/pages/2491413/Mass+Load#MassLoad-Employee>
 - Report Name = Employee Report. Can be changed if desired.
 - Click Generate Report.
 - Save the report to your computer.
- Open and update the load file.
 - Using a formula in Excel you can update the years of experience by one.
 - If you did not already do so, remove any Termination Date records then remove the Termination Date column from the file.
 - Remove any other unnecessary columns. Keep the required columns listed in the Mass Load documentation.
- **Save the file in CSV format.**
- Load the file using Utilities>Mass Load.
 - USPS Load File = Browse your computer to locate your file.
 - Importable Entities = Employee
 - Click Load.
- Manually update the Principal Experience field. If Principals are not Teaching and Assigning Grades, they will **NOT** accrue Authorized Experience Years.

5.____ **Update** the Employee>State Reporting>Degree Type and Semester Hours for any current employees with changes for this fiscal year.

6.____ **Clear** any prior fiscal year information **or** update the information for the new fiscal year in the Position>EMIS Related Information fields.

- Use the Position grid and filter by the following >0 to clear/update the EMIS related fields manually.
 - Full Time Equivalence
 - Contract Amount
 - Contract Work Days
 - Hours In the Day

OR if you have more than you want to clear/update individually

- Use Utilities>Mass Load to clear/update the EMIS related fields.

- Create load file.
 - Go to Core>Position.
 - From the Position grid, click More and add the following to the Employee grid:
 - Number
 - Pos #
 - Full Time Equivalence (under EMIS Related Info)
 - Contract Amount
 - Contract Workdays
 - Hours In the Day
 - Filter on the columns above for values >0.
 - Click Reports.
 - Format = Excel-FieldNames (scroll to bottom)
 - Report Name = Position Report. Can be changed if desired.
 - Click Generate Report.
 - Save the report to your computer.
- Open and update the load file. Clear out fields or update to new amounts needed for the current FY reporting.
- Save the file in CSV format.
- Load the file using Utilities>Mass Load.
 - USPS Load File = Browse your computer to locate your file.
 - Importable Entities = Position
 - Click Load.

7.____ Any employee who was reported with a Position>Separation Date and Separation Reason in the Final L reporting period can be Archived. **Change position status to Terminated**

8.____ If an employee left over the summer months and was not reported as separated in the prior fiscal year, enter a Position>Separation Date **and** Separation Reason. This record will need to be reported to EMIS for the entire reporting year, and the employee should NOT be archived until the Final L reporting (August) has taken place for the fiscal year.

9. ____ Verify any new employees who need to be reported for the new fiscal year have the following:

- Check the Employee>Report to EMIS checkbox.
- Check the Position>Reportable to EMIS checkbox.
- Check the Compensation>Reportable to EMIS checkbox.
 - For every Position being reported, make sure there is a corresponding Compensation record.
- Verify the Credential ID is entered on the Employee>Credential ID field, if employee has an OH License.
- Enter the Employee>State Reporting>Education Level, Semester Hours, Total Experience, Authorized Experience, Principal Experience (if applicable).
- Verify the following information is entered on the Position record:
 - Position Code
 - Assignment Area
 - Funding Source Code 1 (reminder J and X codes will no longer be used)
 - Percent
 - FTE (or in the EMIS Related Information>Full Time Equivalence)

10.____ Run Employee and Position Reports as many times as needed until they are error free. Notify our ITC fiscal.support@noacsc.org for assistance with Debugging this report.

- Generate the Reports>EMIS Reports>Employee Report.

- Generate the Reports>EMIS Reports>Position Report.

11.____ Run each of the **Reports below** to verify **Position and Compensation Information (CK)** elements will be included in the collection

- **EMIS Active Positions Report**
 - Verify: Position #, Position Description, Job Status, 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 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**
 - Verify: Position #, Position Description, Job Status, 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 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 Active Contract Compensation Report**
 - Verify the following:
 - *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
 - *Contract*- Contact Amount, Pays in Contract
- **EMIS Active Non 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
- **EMIS Inactive Non Contract Compensation Report**
 - *Compensation* - Type, Unit Amount, Hours in Day.
 - *Date Range*- Compensation Start Date, Compensation Stop Date
 - *State Reporting*- Reportable to EMIS
- **EMIS Staff Report**- Use report as a validation of which compensations and positions are flagged as reportable to EMIS
- **EMIS Data Extract Report** – This report pulls data from employee, position, and compensation records and will pull the EMIS data based on user filters OR EMIS reporting year.

12.____ Report any EMIS Contractor (CC) or EMIS Contracted Service (CJ) records if district has CC or CJ records.

- Go to Core>EMIS Entry.
- Click Create or the Edit icon to create and update any records.
- Click Save.

- When ready, select the Extract option found within each tab to download the CC and/or CJ file to your computer.
- Upload the file to the Data Collector or provide the file to the person in your district who uploads.

13.____ Notify your EMIS Coordinator that the data is ready for a Period L collection run.

- Review Level One reports for errors.
 - [EMIS Level 1 Errors Explained](#)
 - [EMIS Field Names and Locations](#)
- Review all staff reports for accuracy.

As always, let us know if you need any assistance fiscal.support@noacsc.org.

EMIS Reporting of an Employee Leaving your District

***Separation date is based upon the last day WORKED, not the last day paid**

- **Situation 1:** *If employee was not reported with separation date and reason on FINAL Staff and Course Collection (FY25).
 - INITIAL Staff and Course Collection (FY26)
 - Position Status U
 - Separation Date
 - Separation Reason
 - FINAL Staff and Course Collection (FY26)
 - Same as above
 - INITIAL Staff and Course Collection (FY27)
 - 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 FY26 school year and then resigns, give that employee...
 - INITIAL Staff and Course Collection (FY26)
 - employee's Position Status remains "C"
 - Separation Date
 - Separation Reason
 - FINAL Staff and Course Collection (FY26)
 - Same as above
 - INITIAL Staff and Course Collection (FY27)
 - set the employee's Report to EMIS flags to N on Employee and Position screens
 - Archive employee compensation
- **Situation 3:** 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 DEW with separation date and reason; supplementals are not included in staff missing)
 - Archive employee on Core/Employee
- **Situation 4:** If an employee left your district in FY25 and separation date and reason were reported in Final Staff and Course Collection (FY25), you are finished reporting this person and can now...
 - Set all Report to EMIS flags to N

- Archive employee compensation

Who Should Be Reported (From DEW 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.]