New Fiscal Year/Initial L Reporting USPS-R EMIS Checklist

1.____ Update the *EMIS Configuration Fiscal Year*

Go to *System>Configuration>EMIS Reporting Configuration .*Enter in the new fiscal year and click ✔ Save

Many ITC's update this for their districts, therefore this step may not be necessary. Check with your ITC to verify.

2.____ Archive all prior year compensations using **Mass Change** option 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.ssdt-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 the EMIS collection

3.____ Import this EMIS Demographic Data Report to **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 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**

D*ates*- **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	√	√

4. ____ Import the following **Position** and **Compensation Reports** to **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**

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	√	√

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 through ***System>Modules>EMIS Contractor Module***.

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

8____ Save the **CC** or **CJ** **f**ile 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. If needing to correct errors, contact your ITC if you can't resolve.

9____ **Clearing long term illness data from last fiscal year**

      a. To clear long term illness data, the ***Mass Change*** feature will need to be turned on. To do this go to ***System>Modules*** and click on the

      [**+**] next the ***Mass Change Service***.

      b. Go to ***Core>Employee***.

      c. 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.

      d. You will then click on the ***Mass Change***

      e. Go to the bottom of the screen and chose ***Execution mode***.

      f. Go to ***Load Definition*** and choose from the drop down ***Clear EMIS Long Term Illness***.

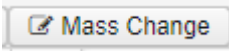   g. Click ***Submit Mass Change***

10.____ **Incrementing the years of experience for employee:** If your district would like to mass load this data now, they can do the following

      Go to ***Core Employee***

        a. On your grid from More choose Number, Last Name, First Name, Authorized Experience, Total Experience, and Terminated Date

b. Go to the *Advance Query* and choose termination date and *Operation=IS_NULL* and then click *Apply Query*.
c. You can then remove the termination Date from the grid or it can be removed from your csv file later.
d. Click on *Reports*
e. For *Format* choose from the drop down option *Excel-FieldNames*
f. Default report name is Employee Report. Can be changed if desired
g. Click *Generate Report*
h. Save report to desktop or a folder of your choosing
i. Using a formula in excel you can update the years of experience.
j. If you did not already do so remove any Termination date records then remove the Termination Date column from the csv file
k. Save the file as a CSV
l. Using *Utilities/Mass Load* locate your file and then choose *Employees* as the Importable Entity
m. Click *Load OR*

11.____ *The district can import this Mass Change definition-- Increment Experience.mcd-json into Employee/Mass Change.*

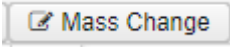a. To import the file in Click on the [Mass Change] button in Employee.

b. In Maintenance Mode under Definition Name click the [Import Definition] button

c. Find and click on the file to import in and then click [Save]

d. 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

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.

e. Click on the [Mass Change] button.

f. Under Choose Mode select the Execution option

g. Under the Load Definition field from the drop down find the **Increment Experience** definition and click on it.

h. Click the [Submit Mass Change]

i. A message will display telling you how many records were updated.

j. Under Employees you can click on the [Report] button and create a report with the years of experience listed.

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

12.____ Archive prior fiscal years contracts so they no longer pull into EMIS.

a. Contact your ITC to assist with running a procedure to set prior fiscal years compensation records to archived.

13.____ **Clear 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.**

a. Contact your ITC for assistance with creating a csv file for making the Mass Load change.

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