

EMIS STAFF CHECKLIST



Completion Date:

_____ 1. Review Board agendas for Staff changes

Position Status:

U - Employee has no Attendance in current FY and was reported last year as active.

C – Employee has attendance records for this year.

_____ 2. Review Employee Separation Clarifications: Position Status Codes “C” & “U”

- Enter Separation Date
- Enter Separation Reason
- Report to EMIS flag should be set to “Y”

- The employee separated/retired prior to the 1st day of school and had no attendance days in the new school year.

The employee was reported as active at the end of last fiscal year.

- Change the Position Status to “U” (No Attendance Days)
- Enter Separation Date after the last day of building close and prior to 1st day
- Enter Separation Reason that will apply on the date above
- Add a calendar stop date on all jobs

_____ 3. *New Certificated* employees who had a ZID in previous reporting period now have an ODE Credential state certificate.

- District will need to update the STATE Assigned ID field
 - Update the DEMSCN or USPSWEB EMIS ENTRY screen with the new ODE Credential ID in the State Assigned Field
 - Update the BIOSCN or USPSWEB EMIS ENTRY screen with the ODE Credential ID in the State Assigned Field
 - District must send an Override request to ODE explaining the ZID to Credential ID change
 - Please make sure this happens, or you will have MISSING STAFF.
 - Check with your EMIS Coordinator to make sure this gets submitted.

Email fiscal-cherwell@ohconnect.org and ask Connect to request an **override**.

As per ODE’s requirement, please attach a spreadsheet with the following column headers:

District IRN; old ZID; new ODE issued credential ID and the staff member’s name.

Example:

| District IRN | Old staff ID | New Staff ID | Name |
|--------------|--------------|--------------|------|
|--------------|--------------|--------------|------|

_____ 4. Review all other staff changes, position changes, etc.

- If employee has a job change... Remember to give them a new job record!!!
- **Recommended: Make the primary job = Job 01**

_____ 5. Run CLRATD (Clear Attendance)

- USPS_ANN/CLRATD – clears out the Long Term illness from last year.

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- _____ 6. Run MASEMIS (Clear EMIS Contract Info fields on JOBSCN2) **IMPORTANT!!**
- Run USPS/USPS_MNT/MASCHG/MASEMIS. Run as a Projection first & review. Then run as an actual.
*These are override fields with old information. They must be cleared or you will be reporting last year's contract information.
- _____ 7. Update Authorize/Total Years for Certificated Staff & Principals
- Run USPS_MNT/MASCHG/MASINC. Run as a Projection first & review. Then run as Actual.
 - I - The employee's accredited length of experience will be incremented by 1
 - N - The employee's accredited length of experience will not be changed
 - R - The employee's accredited length of experience will be reduced by 1
 - Blank fields will be processed as N
 - Update Total Years- **Total** = total number of years of ALL certificated educational service (authorized & non-authorized). Maximum is 40 years. Must be greater than or equal to the authorized years of experience.
 - Update Authorized Years - **Authorized** = total years of authorized teaching experience as a regular or substitute in an elementary or secondary instruction for at least 120 days in a regular school year (ending June 30). Does not include teaching at a college, university, or related institution.
 - Update Principal Years of Experience – will only increment position codes 104 & 108.
- _____ 8. USPS_MNT/USPCHG – Mass set EMIS Flag= “N” on Separated Employees
- The following requirements need to be met before the EMIS Flag can be changed to “N”:
- * The Employee left the district AND
 - * Was reported with a separation date & reason during June Rpt.
- Choose Option 3. Modify EMIS report flag to 'No' for jobs with separation date <= date given (063020**)**
- _____ 9. Optional Reports to Run to Assist with Reporting to EMIS
- **CERLST** – Brief Certificate Employee listing
Displays employee Certificate information and Authorize/Total Years Experience, Position Code and Funding Source
 - **POSSUM** - Position Summary based on FTE Count
This report can be run by building to check if all employees are being report.
 - **EMISRPT** – EMIS Totals Report
Report shows Job Number, TITLE, DOB, RACE, SEX, DEGREE, Experience, Semester HR, IRN building,
Position code, FTE
 - Data is pulled from USPS State Software.
 - This report can be run for certificated and or classified employees.
- _____ 10. Contractor Records will be updated in USPSWEB for district using State Software.
- ✚ CJ – Contract Staff Record Reported only by Contractor
ESC Contracted Services- ESC only enters the CJ record in for all employee hired by the ESC. District contracting with the ESC does not enter any staff information for these employees. ESC will enter:

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- One record for each district the employee is providing services too.
- USPSWEB/Query the Employee/ Select the EMIS Entry screens and ADD Contract CJ Record.

✚ CC - Do you have any *Non-EMIS Contracted Service Entities*: Busing, food service, and custodians/maintenance?

- CC – Contract Record for NON EMIS Reporting Entities
- Enter One for each Contract (Transportation, Food Services)
- Enter these in USPSWEB - Select the Contract Record
- Do you have contracts with non-EMIS reporting Entities?
- Position Status is A-Agency contracted or I-Individual

Table 1. Position Codes and Contract Reporting

| Position Code Series | May be reported with this record | May not be reported with this record; report at individual level using other staff records |
|----------------------|----------------------------------|--|
| 100s | None | 101-199 |
| 200s | None | 201-299 |
| 300s | 301, 307, 319, 329, and 340 | 304, 318, 320, 323, 325-328, 330-334, and 399 |
| 400s | 402-414, and 499 | 415 |
| 500s | 501-508, 599 | 509, 510 |
| 600s | 601-699 | None |
| 700s | 702-799 | None |
| 800s | 801-899 | None |
| 900s | 901-999 | None |

_____ 11. Run USPEMS/PERDET – Employee Reportable to EMIS = Y

- Run the Report For Employee Reportable to EMIS (Y)
Exclude Supplemental (8xx) = YES
- Check and Correct all errors
- Rerun until all errors are clean

_____ 12. Run USPEMS/PERDET – Employee Reportable to EMIS= N

- Run the Report For Employee Reportable to EMIS (N)
Exclude Supplemental (8xx) = YES
- Check Report for anyone who should not be on this list.

_____ 13. Update any changes using USPS Alpha or USPSWEB

- USPSCN/DEMPCN
- USPSCN/POSSCN
- USPSCN/JOBPCN
- USPSWEB/EMIS Entry Screens

If EMIS CONTRACT INFO: Screen 2 of JOBPCN (there are situations where this field will be used)

- Verify that data is for this fiscal year and does not contain outdated information from the previous year.
- Verify Salary, HRS/DAYS FTE are correct and if SPEC ED FTE needs to be updated.

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When Data is Clean, Run USPEMX to create the extract for CC, CJ or CL* records.
Notify EMIS Coordinator the Staff Files are ready.**

_____ 14 When your data is clean and you have CJ (Contractor Staff) and/or (CC Contract Only) records:

- Run USPEMS/USPEMX to create the extraction file (USPEMX_EMISR.SEQ)
- From the Menu> type in USPEMX_FTP to ftp (file transfer) USPEMX_EMISR.SEQ to the EMIS-R server
- Upload the extracted file into the Data Collector from within the data collector when you are ready

**If changes are made to CJ or CC records, a new file will need to be created & placed in the Data Collector.

_____ 15. Check with the EMIS Coordinator to verify that files made it to the data collector.
Work with the EMIS Coordinator to clean up any errors identified during the collection.

Note* PERDET report may be run to check for errors that may appear from last minute changes from ODE.
Run your PERDET report for Reportable to EMIS Y periodically during the reporting period.

Note*** CL – Summer Separation will be created based on the following criteria:

- Building Dates: Building Last Day for Teachers in June _____
- Buildings 1st Day for teachers in August _____
- The employee has no attendance on any JOB in USPS from the last day to present.

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16. ____ Log into the **DATA COLLECTOR** to collect, prepare and preview your staff data <http://ohconnect.org/fiscal/emisr>

Reminder: Only click on SIF Zone if your district source staff data is maintained in USPS/USPSWeb.

If your district is using Tyler Munis, do not check to collect data from the USPS files. The data sources tab needs to be used instead.

| SIF Zone | Zone Status | Collection Status |
|-----------------------------|---|-------------------|
| <input type="checkbox"/> MI | <input checked="" type="checkbox"/> Connected | Not Started |

****Make sure that CHKUPD is not being run in payroll when a Data Collection is run****

17. ____ Review your reports in the Data Collector (validation reports, preview reports, etc)

18. ____ Make any needed changes using USPS or USPSWEB.

- USPSCN/DEMSCN
- USPSCN/POSCN
- USPSCN/JOBSCN
- USPSWEB/EMIS Entry Screens

19. ____ When your data is clean and you have CJ (Contractor Staff) and/or (CC Contract Only) records, you **MAY** need to:

- Run USPEMS/USPEMX to create the extraction file (USPEMX_EMISR.SEQ)
- From the Menu> type in USPEMX_FTP to ftp (file transfer) USPEMX_EMISR.SEQ to the
EMIS-R server
- Upload the extracted file into the Data Collector from within the data collector when you are ready (data sources tab, other data sources, manage link, upload, browse to file, upload).

20. ____ Check your Missing Data Report (this report is part of the preview step). Correct errors as needed, re-collect and resubmit until the Missing Data report shows no missing data for 20L.

21. ____ Coordinate certify-submit to ODE EMIS office with your district EMIS Coordinator.

State ODE Reports:

22. ____ ODE is now publishing reports in the EMISR Data Collector. Work with your EMIS coordinator to access the payroll staff data related reports. Data is also loaded into ODE's data warehouse, the Secure Data Center (SDC).

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23. _____ Treasurers MAY need to provide sign off for Period L reporting
What data fields are reportable when? Look down the listing – is accurate data in each field?



3.3 Staff Demographic (CI) Record

3.3 STAFF DEMOGRAPHIC (CI) RECORD

Required Collection Requests

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

| Record Field Number | Data Element | Initial L | Final L | E-Trans (E) | Student Record Exchange (X) |
|---------------------|---|-----------|---------|-------------|-----------------------------|
| 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 | √ | √ | √ | √ |
| CI080 | Racial/Ethnic Group Element | √ | √ | | |
| CI110 | Semester Hours Element | √ | √ | | |
| CI270 | State Staff ID Element | √ | √ | | |
| CI320 | Suffix Name | √ | √ | √ | √ |
| CI210 | Total Experience Years Element | √ | √ | | |

3.4 STAFF EMPLOYMENT (CK) RECORD

Required Collection Requests

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 | √ | √ |