

## EMIS Staff & Course (L) Collection Checklist

The FY25 Staff/Course EMIS window closes on August 6, 2025 but there's an appeal window that stays open through August 18<sup>th</sup>. If any district files an appeal, it's possible that they might need to submit Staff data beyond August 16<sup>th</sup>. This is important for payroll to know for a couple reasons:

- A. The **EMIS Configuration Fiscal Year** should not be changed to **2026** until after the final submission for **2025**.
- B. Incrementing the years of experience should not be done until after the final submission for 2025.
- C. FY25 Compensations should not be archived until after the final submission for 2025.

### Procedures:

#### 1.\_\_\_\_ Update the **EMIS Configuration Fiscal Year**.

- Go to **System>Configuration>EMIS Reporting Configuration**
- Enter the **fiscal year**
- Click **Save**.

2.\_\_\_\_ **Archive all prior year compensations** using Mass Change option in Contract Compensations or Non Contract Compensations. This will archive the old contracts and prevent them from being included in the EMIS collection. This is also helpful when adding future pay items so that only one compensation is available for selection.

- Go to **Core > Compensations > Contract Compensations**
- Filter using **Compensation Label or Stop Date** to pull in all Compensations for prior fiscal year into the grid.
- Click on **Mass Change** at the top of the grid.
- In the **Load Definition** box, select the "**Compensation Archived**" definition.
  - If you do not see this mass change definition, please contact HCC for help loading it.
- Select **Execution Mode**.
- Click **Submit Mass Change**.

#### 3.\_\_\_\_ **Clear long term illness** information from the last fiscal year.

- Clear using Mass Change. **PREFERRED METHOD**
  - Go to **Core>Employee**.
  - **Filter** for any employees that have a value in the Long Term Illness field,
    - Click More and under State Reporting click Long Term Illness.
    - Filter the Long-Term Illness field entering >0.00 in the filter field.
  - Click **Mass Change**.
  - Select **Execution Mode**.
  - Under **Load Definition**, select **Clear EMIS Long Term Illness**.

- Click **Submit Mass Change**.

**OR**

- Clear **manually**.
  - Go to **Core>Employee**.
  - **Filter** for any employees that have a value in **the Long Term Illness field**,
    - Click More and under State Reporting click Long Term Illness.
    - 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.

**4.\_\_\_\_ Incrementing Years of Experience** (Total Experience, Authorized Experience, Principal Experience, and District Experience (if desired) fields). Keep in mind, employees hired in the new fiscal year should not receive a year of experience until the next fiscal year.

This can be done using **mass change** (instructions below) or a **mass load (preferred method)**. Using the mass load option allows you to increment all four experience fields at one time. It also allows you to remove anyone who should not be incremented.

**Notes about Years of Experience fields: *One year must consist of at least 120 days within a regular school year.***

- **Authorized Years of Experience**-is reported only for certified/licensed employees with a Position Code of 212 or 230. It is extremely important to update this element each year. Non-authorized experience (i.e., teaching service in a college, a university, or a related institution, including the Peace Corps) is not to be included. However, it can be reported in the Total Experience Years Element.
  - **Important Note:** For Authorized years of experience, only TEACHERS (position code 212 or 230) would have a year added to this field.
  - A new teacher would have "0" authorized teaching experience years in both the Initial and Final Staff/Course (L) Collections of the current school year (25-26). This number would then be updated to "1" during the following year's reporting (26-27)
  - Authorized teaching years include teaching service in the following Ohio entities: Public schools, nonpublic schools, Educational Service Centers (ESCs), Community schools, and Special education programs)
- **Total Years of Experience**-Indicates the total number of years of all certificated/licensed educational service (authorized and non-authorized) in elementary schools, secondary schools, colleges, universities, and any other public or nonpublic educational institutions (including the Peace Corps). This element is reported only for certified/licensed employees. Include active military service years up to the maximum allowable five years.

- **Principal Years of Experience**—Indicates the total number of years of certificated/licensed educational service as a school leader, serving as a principal or assistant principal, or with the duties and responsibilities typical of those two positions, in Ohio or in other states, in the following types of organizations: public schools, including vocational schools, state supported schools, STEM schools, community schools, and ODE-licensed preschools, and in chartered, nonpublic schools, such as independent private schools, or parochial schools.
- **Mass Load (Preferred Method)** – Please see the “USPS Incrementing Years of Experience Mass Load” guide. Please contact HCC if you need any assistance.

**OR**

***Please contact HCC for any mass change definitions.***

- **Mass Change Steps** - Use Mass Change to update both Authorized Experience and Total Experience fields.
  - 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 Last Paid Date > MM/DD/YYYY
  - Click **Mass Change**.
  - Under Load Definition, select the Increment Experience.
  - Select Execution Mode.
  - Click Submit Mass Change.
- Use **Mass Change** to update **only** the **Total Experience field**.
  - 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 Last Paid Date > MM/DD/YYY.
  - Click **Mass Change**.
  - Under Load Definition, select Increment Total Experience.
  - Select Execution Mode.
  - Click Submit Mass Change.
- You will need to manually increment the Principal Years of Experience.

**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** (if applicable).

- Use **Mass Change** from the **Position** grid and **filter** by the following >0 to clear the EMIS related fields. Mass Change will clear the following fields. **PREFERRED METHOD FOR CLEARING THE FIELDS.**
  - Full Time Equivalence
  - Contract Amount
  - Contract Work Days
  - Hours In the Day
- Click on **Mass Change** at the top of the grid
- **Load Definition** "Clear EMIS Contract Fields (SSDT)"
- Select **Execution Mode**
- Submit **Mass Change**

**OR**

- Use **Utilities>Mass Load** to clear 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
      - Contract Amount
      - Contract Work Days
      - Hours In the Day
    - Filter on the columns above for values >0.
    - Click Reports.
      - Format = Excel-FieldNames
      - Report Name = Position Report. Can be changed if desired.
    - Click Generate Report.
    - Save the report to your computer.
  - Open and update the load file to new amounts or zeros.
  - 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.

**\*For steps 7-9, please reference the EMIS Reporting Scenarios document\***

**7.\_\_\_\_** Any employee that was reported with a Position>Separation Date and Separation Reason in the Final L reporting period can be Archived or uncheck the Reportable to EMIS boxes.

8.\_\_\_\_ If an employee left over the summer months or 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 Fiscal Year and the employee should not be archived until the Final L reporting has taken place for the fiscal year.

9.\_\_\_\_ Update employees that are no longer employed in the district or in specific positions.

- Change Position>Separation Reason and Separation Date fields.
  - The Position Status should remain C - Continuing if the employee had attendance days in the fiscal year.
  - The Position Status should be changed to U- No longer employed by district in this position if they did not have attendance during the fiscal year.
- Employees reported with a Separation Reason and Separation Date will need to be reported to EMIS for the entire Fiscal Year and the employee should not be archived until the Final L reporting has taken place for the fiscal year.

10. \_\_\_\_ Verify any new employees that 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.**
- 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
  - Percent
  - FTE (or in the EMIS Related Information>Full Time Equivalence)

#### **OPTIONAL REPORTS (11-13)**

**\*Most of the reports mentioned in steps 11-13 have already been loaded into your Report Manager, if you do not see them, please contact HCC to have them added\***

11.\_\_\_\_ Import the EMIS Demographic Data Report to the Reports>Report Manager or create a report from the Employee grid to verify Employee Demographic (CI) elements that will be included from the Employee records when the SIF data collection is processed. To find all the ODE EMIS reportable Staff Demographic elements please refer to the ODE EMIS Manual>Staff Demographic Record Chapter.

- 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

**12. \_\_\_\_** Import the following Position Reports to the Reports>Report Manager or create a report from the Position grid to verify Staff Employment (CK) elements that will be included from the Position records when the SIF data collection is processed. To find all the ODE EMIS reportable Staff Employment elements please refer to the ODE EMIS Manual>[Staff Employment Record Chapter](#).

- EMIS Active 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 Inactive Position Report - After creating the report, any records with a Termination date before current fiscal year can be removed.
  - Verify:
    - Position #, Position Description, Job Status, Termination Date, Stop Date.
    - *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

**13. \_\_\_\_** Import the following Compensation Reports to the Reports>Report Manager or create a report from the Compensation grid to verify Staff Employment (CK) elements that will be included from the Compensation records when the SIF data collection is processed. To find all the ODE EMIS reportable Staff Employment elements please refer to the ODE EMIS Manual>[Staff Employment Record Chapter](#).

- EMIS Active Contract Compensation Report -
  - Verify:
    - *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*- Contract Amount, Pays in Contract
- EMIS Active Non Contract Compensation Report
  - Verify:
    - *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, Pay Unit, Unit Amount, Hours in Day
  - *Date Range* - Compensation Start Date, Compensation Stop Date
  - *State Reporting* - Reportable to EMIS

**14.\_\_\_\_** Run Employee and Position Reports as many times as needed until they are error free. HCC can use the Debugging EMIS Report Errors to assist with any errors. Please submit a HelpDesk ticket.

- Generate the Reports>EMIS Reports>Employee Report.
- Generate the Reports>EMIS Reports>Position Report.

**15.\_\_\_\_** Run the EMIS Staff Report to check the information that will be submitted in the Data Collector. Please contact HCC if you need any assistance.

- To download the report definition and add it to your Report Manager follow the steps below:
  - Click [here](#) or from Public Shared USPS Reports Library, download the EMIS Staff Report report definition.
  - Go to Reports>Report Manager, select Import Report.
    - Locate the EMIS Staff Report report definition.
    - Enter a report name, description, and tag (if desired).
    - Click Save.
  - Generate the report in multiple ways until all information that will be reported is accurate.

**16.\_\_\_\_** Report any EMIS Contractor(CC) or EMIS Contracted Service (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(s) to the Data Collector.

**17.\_\_\_\_** Run the Initial Staff and Course Collection in Data Collector. This is done by the EMIS Coordinator. They will alert you to any warnings or errors.

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