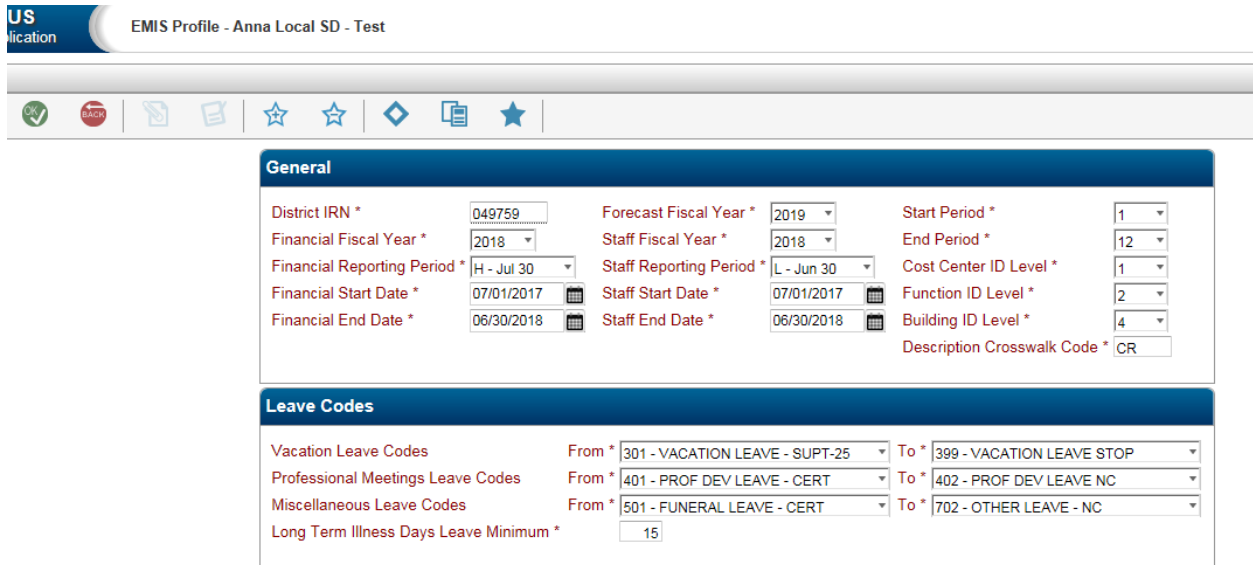


STAFF EMIS REPORTING

1. _____ Update EMIS Profile if necessary – EMIS/EMIS Profile

Check the fiscal year for the EMIS load you are completing, and the start date and stop date.



General

District IRN *	049759	Forecast Fiscal Year *	2019	Start Period *	1
Financial Fiscal Year *	2018	Staff Fiscal Year *	2018	End Period *	12
Financial Reporting Period *	H - Jul 30	Staff Reporting Period *	L - Jun 30	Cost Center ID Level *	1
Financial Start Date *	07/01/2017	Staff Start Date *	07/01/2017	Function ID Level *	2
Financial End Date *	06/30/2018	Staff End Date *	06/30/2018	Building ID Level *	4
				Description Crosswalk Code *	CR

Leave Codes

Vacation Leave Codes	From *	301 - VACATION LEAVE - SUPT-25	To *	399 - VACATION LEAVE STOP
Professional Meetings Leave Codes	From *	401 - PROF DEV LEAVE - CERT	To *	402 - PROF DEV LEAVE NC
Miscellaneous Leave Codes	From *	501 - FUNERAL LEAVE - CERT	To *	702 - OTHER LEAVE - NC
Long Term Illness Days Leave Minimum *		15		

Leave Codes section should be leave ranges that don't count as an absence for EMIS purposes. Days worked will be calculated by taking the Work Days in Pay Rate screen less the absences marked as sick, personal, or dock. (Unless the override boxes are completed in the EMIS Position Information screen.)

2. _____ Staff EMIS Positions

HR > Employee Information > Select Employee > select Actions, select EMIS Position Information

This controls whether or not the position is reported. Do not complete if you don't need to report. This screen comes up when entering a new employee. If the employee does not need reported (substitutes, etc.,) click on the back button to continue without entering.

If this screen is already completed and this position no longer needs reported to EMIS, edit the entry by clicking on the OK key, then check the box: Do Not Report to EMIS – toward the bottom right

Search Criteria

Employee Number

Social Security Number

Last Name

First Name

Department

Base Location

Only List Pending
 Include Terminated
 Exclude Pending Employees

Paycheck Worksheet

IRS Tax Levy

Payouts

Terminate

Attendance

Clear Payout Dates

EMIS Position Information

EMIS Staff Report

Click to open OH EMIS Position Information page for this employee.

Employee	Last Name	First Name	Department	Location	Hire Date	Last Date to Pay
1035	ADKINS JR	JOHN S	TEACHERS	ANNA HIGH SCHOOL	08/25/1997	*
1260	ALBERS	JACK	SUBSTITUTE EMPLOYEE	DISTRICT	10/31/2016	
1236	ALBERS	SARAH ELIZABETH	SUPPLEMENTAL	ANNA HIGH SCHOOL	07/01/2016	
1040	ALTHAUER	HEATHER R	TEACHERS	ANNA ELEMENTARY SCHOOL	09/02/1997	
1044	ALTHAUER	KRISTIAN K	TEACHERS	ANNA MIDDLE SCHOOL	08/21/1998	
1030	ALTHAUER	MICHAEL	SUBSTITUTE EMPLOYEE	DISTRICT	01/12/1995	
1030	ALTHAUER	MICHAEL	SUBSTITUTE EMPLOYEE	DISTRICT	01/12/1995	

Complete fields

1 match(es) found

Position Information	Funding Information
<p>EMIS Employee ID * <input type="text" value="KU1012132"/></p> <p>Job Class <input type="text" value="230A - TEACHER - 184 - MC"/></p> <p>EMIS Position * <input type="text" value="230 TEACHER - 184 - MC"/></p> <p>Position Status * <input type="text" value="C - Current Position in District"/></p> <p>Position Location <input type="text" value="2 - ANNA HIGH SCHOOL"/></p> <p>Building IRN * <input type="text" value="049759 DISTRICT WIDE"/></p> <p>Position FTE * <input type="text" value="1.00"/></p> <p>Special Education FTE * <input type="text" value="0.00"/></p>	<p>Percent * EMIS Fund *</p> <p><input type="text" value="100"/> <input type="text" value="L - Local Funds and/or State Foundation Funds"/> <input type="checkbox"/> Continuous</p> <p><input type="text" value="0"/> <input type="text" value=""/></p> <p><input type="text" value="0"/> <input type="text" value=""/></p>
<p>Attendance Overrides and Longterm Days</p> <p>Primary EMIS position * <input checked="" type="checkbox"/></p> <p>Demo (CI) Attendance Days Override <input type="text"/> <input type="checkbox"/> Check to use this override value</p> <p>Demo (CI) Absence Days Override <input type="text"/> <input type="checkbox"/> Check to use this override value</p> <p>Demo (CI) Longterm Days <input type="text"/></p> <p>Demo (CI) Early Childhood <input type="text"/></p>	

Contract Data and Miscellaneous

Position Type * <input type="text" value="R - Regular"/>	Start Date * <input type="text" value="08/22/2016"/>	<input type="checkbox"/> Do not report to EMIS
Type of Appointment * <input type="text" value="1 - Certificated"/>	Separation Reason <input type="text"/>	
Length of Work Day (Hours) * <input type="text" value="7.50"/>	Separation Date <input type="text"/>	
Scheduled Work Days * <input type="text" value="184"/>	Contract Code * <input type="text" value="100"/>	
Contracted Pay Type * <input type="text" value="A - Annual salary"/>	Grade Level Assigned: Low * <input type="text" value="09 - Ninth grade"/>	
Contracted Pay Amount/Rate * <input type="text" value="66,227.00"/>	Grade Level Assigned: High * <input type="text" value="12 - Twelfth grade"/>	
Extended Service <input type="text" value="0"/>	HQPD Activity * <input type="text" value="Y - Participant"/>	
Assignment Area * <input type="text" value="999370 - GENERAL EDUCATION"/>	Qualified Paraprofessional * <input type="text" value="- Not Applicable"/>	

Record added

3. _____ Update State Required screen for Y/N Reportable to EMIS

HR > Employee Information > Select Employee > Payroll Information > State Required –

Mark the Report to EMIS field Y/N

This controls the individual for reporting

Employee Information - Anna Local SD - Test

Search Criteria

Employee Number:

Social Security Number:

Last Name:

First Name:

Department:

Base Location:

Find Advanced

Dropdown Menu:

- Deductions
- Earnings By Pay
- Group Life
- Leave Requests
- Pay Rates
- Prior Earnings/Taxes
- State Required**
- Taxes
- Time Entry

Employee	Last Name	First Name	Department	Location	Hire Date	Last Date to Pay
1035	ADKINS JR	JOHN S	TEACHERS	ANNA HIGH SCHOOL	08/25/1997	
1260	ALBERS	JACK	SUBSTITUTE EMPLOYEE	DISTRICT	10/31/2016	
1236	ALBERS	SARAH ELIZABETH	SUPPLEMENTAL	ANNA HIGH SCHOOL	07/01/2016	
1040	ALTHAUSER	HEATHER R	TEACHERS	ANNA ELEMENTARY SCHO	09/02/1997	
1044	ALTHAUSER	KRISTIAN K	TEACHERS	ANNA MIDDLE SCHOOL	08/21/1998	
1030	ALTHAUSER	MICHAEL	SUBSTITUTE EMPLOYEE	DISTRICT	01/12/1995	
1020	ALTHAUSER	SUSAN KAY	SUBSTITUTE EMPLOYEE	DISTRICT	07/01/1993	
1199	ALTMAN	TRICIA C	SUBSTITUTE EMPLOYEE	DISTRICT	08/31/2015	
1229	AMBOS	ASHLEY ANN	SUBSTITUTE EMPLOYEE	DISTRICT	04/25/2016	
1001	ANSLEY	JOANNE	SUBSTITUTE EMPLOYEE	DISTRICT	09/01/1977	
1140	ARNOLD	ELIZABETH ROSE	INSTRUCTIONAL SPECIALIS	ANNA ELEMENTARY SCHO	10/29/2012	
1201	AUFDERHAAR	EMILY NICHOLE	STUDENT WORKER	DISTRICT	09/01/2015	

278 match(es) found

Version 5.1 Test

Ohio State Reports - JOHN S ADKINS JR (1035) - Anna Local SD - Test

Ohio State Reports

SERS Days MTD STRS Days Curr

SERS Days Curr STRS Days FTD

Weeks Paid Tot SERS Hours/Day

Weeks Paid Cur Qtrwage Rpt

Member Type SERS Xtra Hrs

SERS Emp Stat

Default Weeks SERS Emp Date

Worksite Code EMIS Term Code

Mult Worksite EMIS Term Date

New Hire Rpt Rpt to EMIS

Y = included in EMIS Rpt/ N = not included

4. ____ If this is the first time for reporting during a fiscal year, Update EMIS Position Salaries and Years of Experience

a. ____ EMIS > Update EMIS Position Salaries- OK to update all records

The screenshot shows a web browser window with a toolbar at the top. Below the toolbar is a blue header bar with the text "Report Information". Underneath, there is an information icon and a text box that reads: "This option updates the employee EMIS Position record Amount/Rate field from matching active pay rates for unterminated EMIS Positions." Below this is another blue header bar labeled "Report Criteria". Underneath, there are four input fields: "Employee Number" with a search icon, "EMIS Position" with a search icon, "Position Type" with a dropdown arrow, and "Bargaining Unit" with a dropdown arrow.

A report will be created showing the update of the salary or hourly wage and updated days based on the current Pay Rate per employee per position

b. ____ HR > State > OH Update Service Years – this updates service years only on the Employee Information Screen – it does not affect the salary step on the Pay Rate screen

The screenshot shows a web browser window with a blue header bar labeled "Update Information". Below the header, there is an information icon and a text box that reads: "Use the option to update the years of service information for all employees. The process will update all employees whose hire date falls on or before the entered hire. The process will not update terminated employees unless they are terminated within the current fiscal year and worked at least 120 days or they are retirees who return to work as subs. Select a department to exclude from the update." Below this is another blue header bar labeled "Update Criteria". Underneath, there is a "Hire Date" field with a calendar icon and the date "10/24/2017". Below that is an "Exclude Departments" field with a list box and a "Select Codes" button.

5. ____ Loading Employees to the EMIS screens

a. ____ To Load all employees, go to EMIS > EMIS Staff Report >click LOAD

eFinancePLUS
 a PLUS 360 Application

EMIS Staff Report - Anna Local SD - Test CATH

[Print Staff Employment Listing](#) |
 [Print Staff Demographic Listing](#) |
 [Employment](#) |
 [Contractor](#) |
 [Summer Separation](#) |
 [Load](#)

Search Criteria

Employee Number
 Last Name
 First Name
 Social Security Number

Record Type	Employee Number	Social Security Number	Last Name	First Name

[General Demographic Information](#) |
 [Education Information](#) |
 [Service Information](#)

General Information	Personal Information
Record Number <input type="text"/> Record Status <input type="text"/> Sort Type <input type="text"/> Fiscal Year <input type="text"/> Reporting Period <input type="text"/> District IRN <input type="text"/>	Employee Number * <input type="text"/> <input type="checkbox"/> Continuous Social Security Number * <input type="text"/> OH State Staff ID * <input type="text"/> EMIS Employee ID * <input type="text"/> Last Name * <input type="text"/> First Name * <input type="text"/> Middle Name <input type="text"/> Name Suffix <input type="text"/> Date of Birth * <input type="text"/> Racial/Ethnic Category * <input type="text"/> Gender * <input type="text"/>

Load Information

This option will load demographic and/or employment data into the EMIS staff tables.

Report Header Information

Reporting Period	L
Start Date	07/01/2017
End Date	06/30/2018
Fiscal Year	2018

Clear Options

Clear all records for fiscal year and report period
 Clear records according to load criteria

Load Options

Staff demographic data only
 Staff employment data only
 Both demographic and employment data

Other Options

Calculate Attendance

Header information should match what is entered in EMIS Profile

****Select Clear all records for fiscal year and report period**

****Select Both demographic and employment data**

*Could select other options to just clear demographic or employment data or could use criteria to narrow down to specific people to be cleared, but recommend to clear all and start fresh with new load each time.

****Check Calculate Attendance**

When done running, it will tell you how many records were loaded, and you will get a report. There should be two records per employee – staff & demographic. (So the number of records loaded should be twice as many as the people you are loading.)

The screenshot shows a software interface with several sections:

- Load Information:** Contains an information icon and text: "This option will load demographic and/or employment data into the EMIS staff tables."
- Report Header Information:** A table with the following data:

Reporting Period	L
Start Date	07/01/2017
End Date	06/30/2018
Fiscal Year	2018
- Clear Options:** Two radio button options:
 - Clear all records for fiscal year and report period
 - Clear records according to load criteriaA red callout box points to the first option with the text "2 staff records loaded".
- Load Options:** Three radio button options and a "Criteria" button:
 - Staff demographic data only
 - Staff employment data only
 - Both demographic and employment data
- Other Options:** A checkbox for "Calculate Attendance" which is checked.

At the bottom, a yellow-bordered dialog box asks: "Do you want to open or save r_staffld_8551.pdf from efinance.mcoecn.org?". It has "Open", "Save", "Cancel", and "x" buttons.

EMIS STAFF LOAD (staffld)

Started : 06/16/2017 09:34:39
User Name : doseckc

Reporting Period : L
Start Date : 07/01/2017
End Date : 06/30/2018
Fiscal Year : 2018
Clear Existing Tables : A
File to Load : B
Status Report File : r_staffld.rpt
Select Criteria :

2 staff records loaded

6. _____ Go back to the EMIS > EMIS Staff Report and run reports to verify data

The screenshot displays the eFinancePLUS application interface. At the top, it shows the application name and user information. Below this is a navigation bar with tabs for 'Print Staff Employment Listing', 'Print Staff Demographic Listing', 'Employment', 'Contractor', 'Summer Separation', and 'Load'. The 'Print Staff Demographic Listing' tab is active. Below the navigation bar is a 'Search Criteria' section with input fields for Employee Number, Last Name, First Name, and Social Security Number, along with 'Find' and 'Advanced' buttons. Below the search criteria is a table with columns for Record Type, Employee Number, Social Security Number, Last Name, and First Name. Below the table are tabs for 'General Demographic Information', 'Education Information', and 'Service Information'. The 'General Demographic Information' tab is active, showing a form with 'General Information' and 'Personal Information' sections. The 'Personal Information' section includes fields for Employee Number, Social Security Number, OH State Staff ID, EMIS Employee ID, Last Name, First Name, Middle Name, Name Suffix, Date of Birth, Racial/Ethnic Category, and Gender.

There are multiple Report options in the tabs at the top – that can be run for all employees. These can be opened as excel files for easier viewing.

- a. _____ The Staff Employment Listing is a list of all individual jobs that will be reported to EMIS
- b. _____ The Staff Demographic Listing is a list of all individuals that will be reported to EMIS and their demographic data.

Click on Find to see all the employees that were loaded and their data. If you highlight one employee, you can look at their position data by clicking on Employment on the action bar in the upper left on the screen.

Click on the different tabs at the top left to see different type of employee records for the highlighted staff member, click through the tab at the bottom to see additional info.

The screenshot shows the eFinancePLUS application interface. At the top, there are tabs for 'Employment', 'Contractor', and 'Summer Separation'. Below this is a search criteria section with fields for Employee Number, Last Name, First Name, and Social Security Number. A table below the search criteria shows one record with the following details:

Record Type	Employee Number	Social Security Number	Last Name	First Name
BOTH	1035	[REDACTED]	ADKINS	JOHN

Below the table, there are tabs for 'General Demographic Information', 'Education Information', and 'Service Information'. The 'General Information' tab is active, showing details for Record Number 1, Record Status A, Sort Type CI, Fiscal Year 2018, Reporting Period L, and District IRN 049759. The 'Personal Information' tab is also active, showing fields for Employee Number (1035), Social Security Number ([REDACTED]), OH State Staff ID (KU1012132), EMIS Employee ID (KU1012132), Last Name (ADKINS), First Name (JOHN), Middle Name (S), Name Suffix (JR), Date of Birth (09/14/1970), Racial/Ethnic Category (W - WHITE), and Gender (M - MALE).

7. _____ There is a PERDET report in Cognos – Reports for Testing Folder / select PERDET (Optional) – I’m not so sure this works well

8. _____ Extract Data – go to EMIS/ EMIS Data Export, select Staff Information tab

The screenshot shows the eFinancePLUS application interface. The left sidebar contains a navigation menu with the 'EMIS' tab selected. The main content area displays the 'EMIS Data Export' menu, which is organized into three sections:

- EMIS**
 - EMIS Data Export
 - EMIS Employee Positions Report
 - EMIS Financial Load
 - EMIS Staff Report
 - Update EMIS Position Salaries
- EMIS Reference Tables**
 - EMIS Assignment Codes
 - EMIS Building IRN Codes
 - EMIS Class Codes
 - EMIS Fund Class Codes
 - EMIS Profile
- EMIS Financial Tables**
 - 5 Year Forecast
 - 5 Year Forecast Notes
 - Capital Assets
 - Cash Table
 - Exhibit 1
 - Expenditure Table
 - Federal Assistance Detail
 - Federal Assistance Summary
 - Operational Unit
 - Organization General Information
 - Receipt Table
 - Statement R Descriptions
 - Statement R Detail

Report Information



This option will create the OH EMIS data export for the selected items.

Report Header Information

Report Date * 06/22/2017

Report Time * 13:53:51

	Staff	Financial	Forecast
Reporting Period L		H	P
Start Period		1	
End Period		12	
Fiscal Year	2017	2017	2018
Reporting District	045963		

Staff Information

Financial Information

Miscellaneous Information

Staff Demographic Information

Export Staff Demographic Data

Criteria

Staff Employment Information

Export Staff Employment Data

Criteria

Contract Staff Information

Export Contractor Staff Employment Data

Export Contract Only Staff Data

Staff Summer Employment Separation Information

Export Date and Time defaults to today's date/time.

The next five lines comes for the EMIS Profile, so if these need changed, go back to the Profile to make those changes.

Report screen

Print - New Knoxville Local SD - Live

EMIS DATA EXPORT STATUS LOG

Destination	File Options
<input type="radio"/> File <input checked="" type="radio"/> Screen	File Name H:/rpt/exportems.log

OK Back

SEQ file name window:

Print - Anna Local SD - Test

EMIS DATA EXPORT FILE

Destination	Printer Options
<input checked="" type="radio"/> File <input type="radio"/> Screen	Printer Name Default Number of Copies 1

File Options
File Name H:/rpt/emisdata.seq

OK Back

Print - New Knoxville Local SD - Live

STAFF EXPORT VALIDATION REPORT

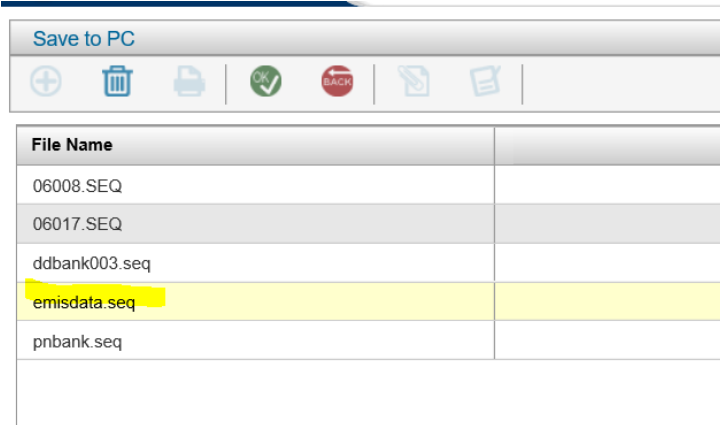
Destination	File Options
<input type="radio"/> File <input checked="" type="radio"/> Screen <input type="radio"/> Excel	File Name H:/rpt/stf_exp.rpt

Excel Options
Data Option No Totals <input type="checkbox"/> Run in the Background

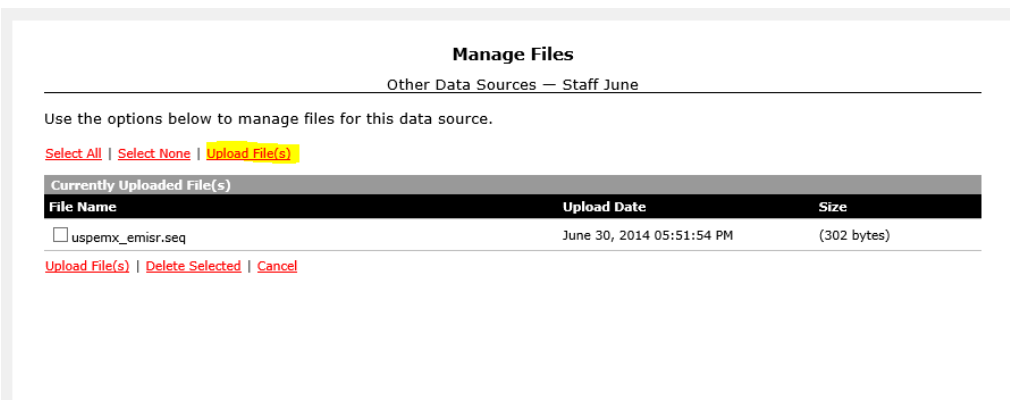
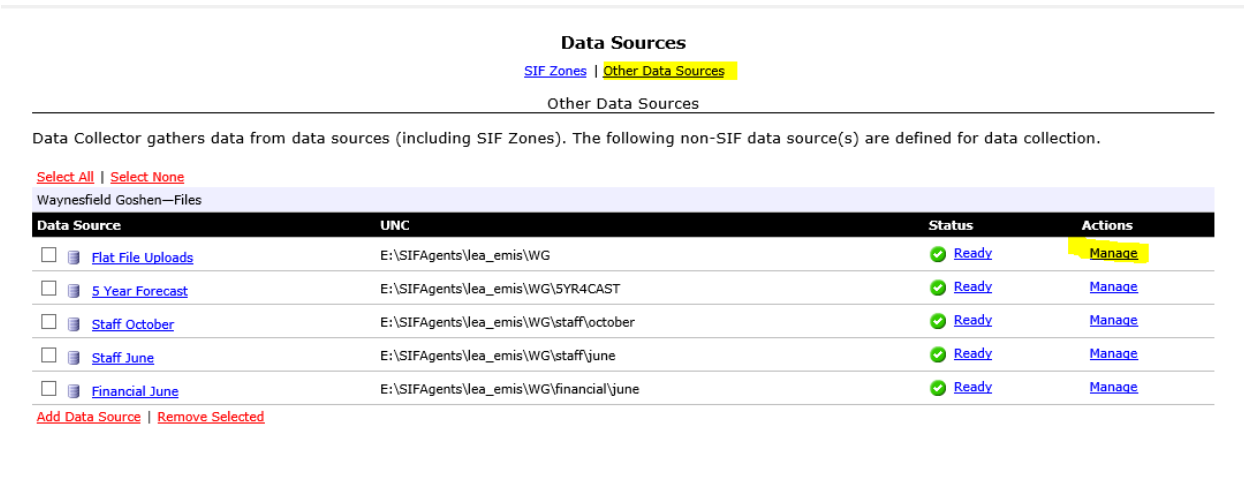
OK Back

9. _____ Saving the file and uploading to EMIS-R:

a. _____ Find .seq in the eForms &Tools / View Files – enter *.seq in the file mask & hit your Enter key



b. _____ Save to PC, go to SIF, click Data Sources, click Other Data Sources, click Manage next to Flat File Uploads, choose Upload File, choose File, browse & select file, Open, then click Upload



10. _____ Complete the Collection Request as normal:

Collection Requests | Collection Status | Submissions | Progress | Reports | Archives | Preferences

Collection Requests Summary

Collection Requests Summary

Ohio Department of Education

[Refresh](#) | [Restore Defaults](#)


Use the choices below to filter the list of collection requests shown


Collection Request: **Data Set:** **School Year:** **Last Activity Within:**

Show closed collections

Sort Order

Order Collections By: Submission Close Date A-Z Z-A A-Z on Short Name Z-A on Short Name Most recently active

 **Initial Staff and Course Collection (FY18)**

FY18-L-Stf Crs Init: Collection required for all EMIS reporting entities. The beginning of year staff collection includes staff employed any time in F... 

Submissions: tomorrow - January 31, 2018
Version: 1
Status: Data Collection has been prepared on September 28, 2017 at 07:38:20 PM and is available for preview. You need to re-prepare to make it available for certification.
Submission Number: 1 (attempt 1)

Actions: [Start/Stop Collection](#)
[Prepare](#)
[Cancel](#)
[Add New Scheduled Collection](#)
[Set Default Collection properties](#)

Prepare Errors: [None \(has other errors or warnings\)](#)
Prepare Outputs: [Level 1 Validations](#)
[Preview Prepared Data](#)

[Refresh](#) | [Restore Defaults](#)