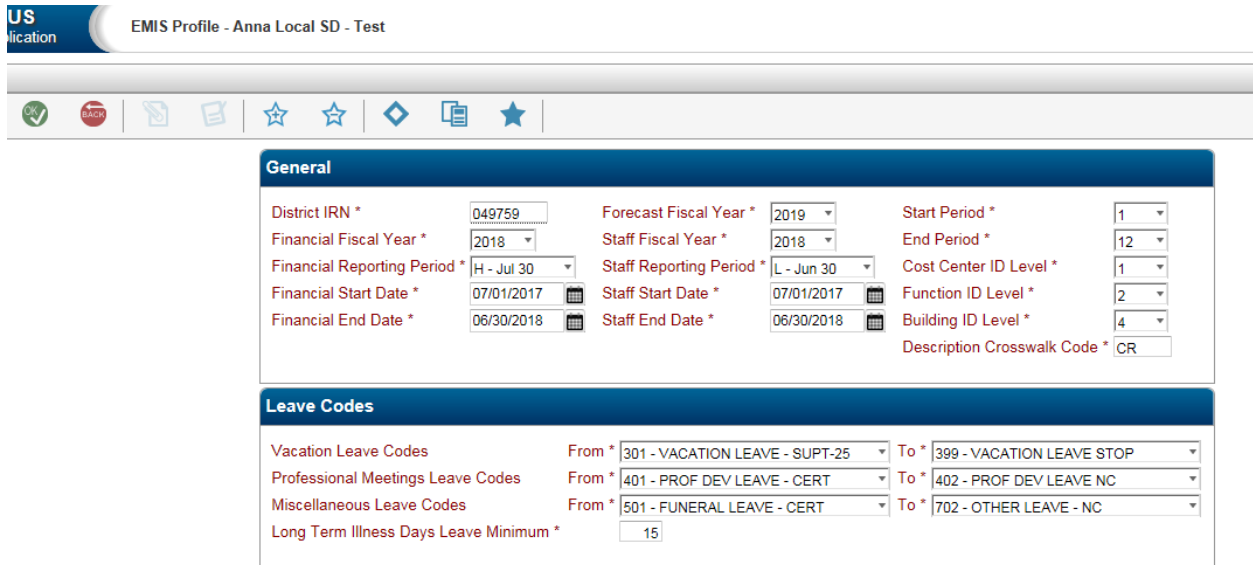# STAFF EMIS REPORTING

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.



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

Complete fields

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

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



    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



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                                    CATHY

Print Staff Employment Listing    Print Staff Demographic Listing    Employment    Contractor    Summer Separation    Load

## Search Criteria

Employee Number
Last Name
First Name
Social Security Number

[Find]    [Advanced]

| Record Type | Employee Number | Social Security Number | Last Name | First Name | |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |

General Demographic Information    Education Information    Service Information

| General Information | Personal Information |
|---|---|

Record Number            Employee Number *                    Last Name *                          ☑ Continuous
Record Status            Social Security Number *              First Name *
Sort Type               OH State Staff ID *                   Middle Name
Fiscal Year             EMIS Employee ID *                    Name Suffix
Reporting Period                                              Date of Birth *
District IRN                                                  Racial/Ethnic Category *
                                                             Gender *

## 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        [Criteria]
○ 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.)

```
                  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



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.



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

## 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



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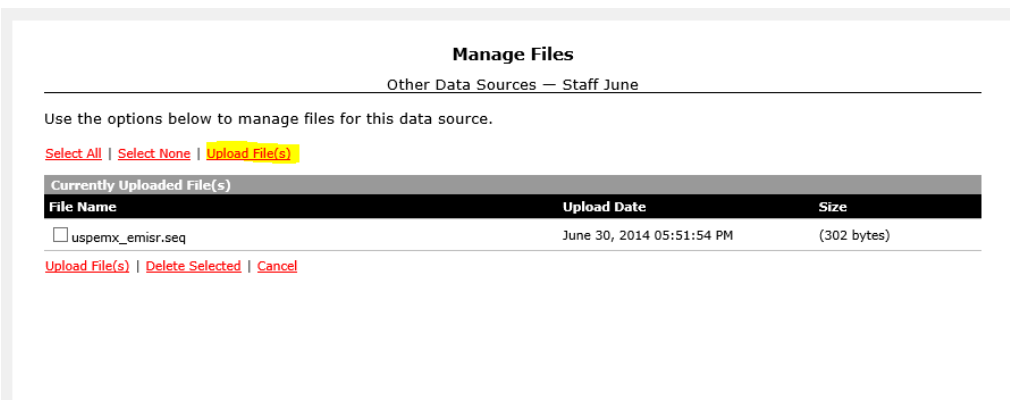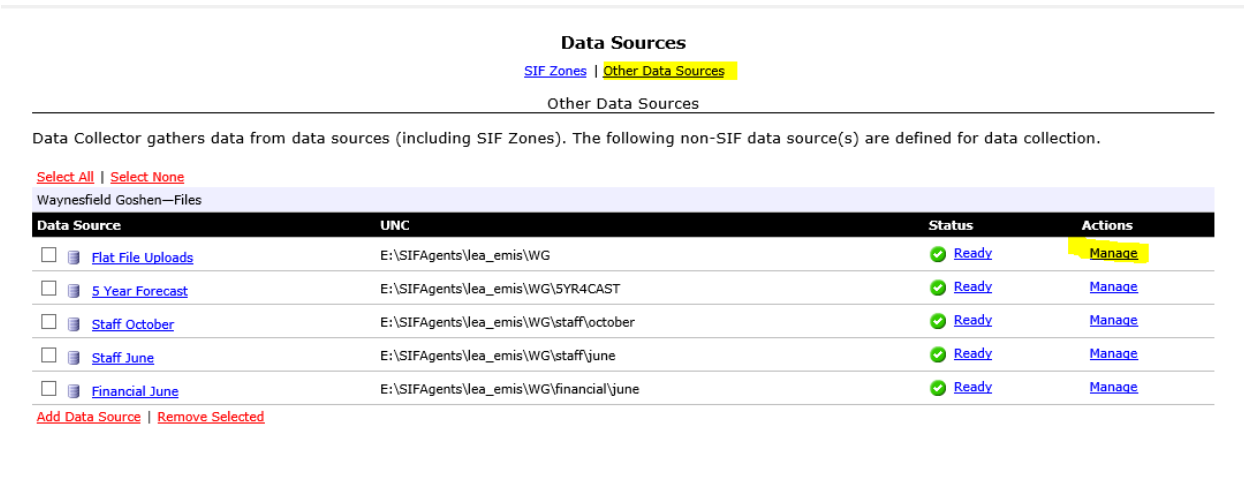
9. _____ Saving the file and uploading to EMIS-R:

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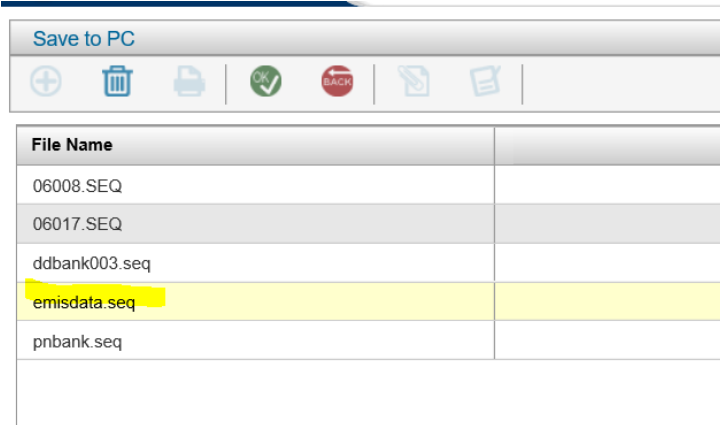


    b. _____Save to PC, go to SIF, click Data Sources, click Other Data Sources, click Manage next to Flat File Uploads, choose Upload File, choose File, browse & select file, Open, then click Upload

10. _____ Complete the Collection Request as normal: