

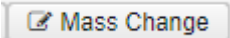
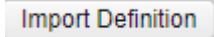

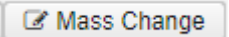





# New Fiscal Year USPS-R Staff EMIS Checklist

1. \_\_\_ Update the *EMIS Configuration Fiscal Year*
  - a. Go to **System>Configuration>EMIS Reporting Configuration**. Enter in the new fiscal year and click 
2. \_\_\_ 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.
  - a. **If CJ records are required, this module will need to be turned on through System>Modules>EMIS Contractor Module.**
3. \_\_\_ 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.
4. \_\_\_ Save the CC or CJ file 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.
5. \_\_\_ 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**.
    - i. Go to **Core>Employee**.
    - ii. If you wish to filter for any long term illness employees on the grid, click **More** and under **Staff Demographics** click **Long Term Illness**. You can then filter the Long Term Illness field entering on the grid >0.00.
  - b. You will then click on the **Mass Change** button.
  - c. Go to the bottom of the screen and chose **Execution mode**.
  - d. Go to **Load Definition** and choose from the drop down **Clear EMIS Long Term Illness**.
  - e. Click **Submit Mass Change**.
6. \_\_\_ **Incrementing the years of experience for employee:** If your district would like to mass load this data now, they can do the following
  - a. Go to **Core Employee**
  - b. On your grid from More choose Number, Last Name, First Name, Authorized Experience, Total Experience, Principal Experience and Terminated Date
  - c. Go to the **Advance Query** and choose termination date and **Operation=IS\_NULL** and then click **Apply Query**.
  - d. You can then remove the termination Date from the grid or it can be removed from your csv file later.
  - e. Click on **Reports**
  - f. For **Format** choose from the drop down option **Excel-FieldNames**
  - g. Default report name is Employee Report. Can be changed if desired
  - h. Click **Generate Report**
  - i. Save report to desktop or a folder of your choosing
  - j. Using a formula in excel you can update the years of experience.
  - k. If you did not already do so remove the Termination date from the csv file
  - l. Save the file as a CSV
  - m. Using **Utilities/Mass Load** locate your file and then choose **Employees** as the Importable Entity
  - n. Click **LoadOR**
7. **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  button in Employees
  - b. In Maintenance Mode under Definition Name click the  button  

  - c. Find and click on the file to import in and then click
  - d. Go back to the Employee records and filter the data on the grid to pull all employees you wish to increment Authorized and Total Experience years for.
  - e. Click on the  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  button.
  - i. A message will display telling you how many records were updated.
  - j. Under Employees you can click on  button and create a report with the years of experience listed.
8. \_\_\_ **Set prior fiscal years contracts 'Report to EMIS' to not reportable.**
  - a. Once Final EMIS submission is closed, please contact your ITC to run a procedure to set prior fiscal years compensation records to false.
9. \_\_\_ **Clear any value in 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. Once final EMIS submission is closed, please contact your ITC to run a procedure to clear.

Any questions on EMIS related fields, please click go to the [EMIS Entry](#) documentation.