Helpful Hints Guide:
October EPIMS Report - 2019

The Support Team has prepared a list of helpful tips and recommendations to prepare and report your data for the October EPIMS Report.

Before you run your first EPIMS Export you will need to do the following:

- **The October EPIMS data collection is run as of 10/01/2019.** Go to iStaff Biographical > iStaff Procedures – iStaff Bio > iStaff Configuration screen. Set the EPIMS Export As-of Date 10/01/2097. This will make sure the Staff Roster and Work Assignment files reflect staff status and Work Assignments for October 2.

- **Make sure that your school calendars and Academic Year Settings have the correct Start/End Dates for the School Year & Terms.** Check each school calendar to confirm the school year Start/End Dates are accurate and that all holidays, vacation days, and non-school days (ie. full curriculum days) have been entered as a Holiday.

  The Academic Year Settings Start/End Dates for each school must also be accurate for each Term. The Start Date for Term 1/Quarter 1 must match the start date of your school calendar.

- **Make sure that the Additional ("fake") SIF Terms are selected on the Academic Year Settings screen** – SIF Districts need to have Term Codes set up for all of the course term combinations used in their course catalog during the school year. These additional SIF terms are used for both SIF SCS and EPIMS reporting. NOTE: The Order of the Terms should match the previous year so that the PCL Progress Report and Report Card form term instances will match up.

  Helpful Hint! For detailed instructions for setting up and mapping these Additional SIF Terms, please refer to Page 6 of the Helpful Hints Guide – October SCS 2019.

- **Make sure all new (reportable) Staff members that joined the school district this year are set to Report to DOE = Yes, have a MEPID Number, and have a Career Record.**

  NOTE: The DESE requires you report all Long Term Substitutes that work 6 weeks or more during the school year.

  NOTE: Staff cannot be updated to Report to DOE = Yes until the MEPID is entered.

  Helpful Hint! The Export for MEPIDs report can be used to find all working staff with no MEPID. Go to iStaff Biographical > iStaff Procedures > Export for MEPIDS; set Date = 10/01/2019; Set Type = Assign; Set Status = Employed/Working. The export will give you a report of all working staff (Report to DOE NO or Yes) that have no MEPID number. By setting the Type = Assign the file will contain all the fields required to upload to the DOE to assign the MEPIDs. The file that comes back form the DOE can then be imported into iPass using iStaff Procedures > Import DOE MEPID Data.

- **Check Career Records to make sure:**

  o There is a Career record for each Job Type reported for the staff member (ie. Teacher, Co-Techer, Support Content Teacher). This is required for SIF EPIMS. There must be at least one work assignment for each Career record Job Type or there will be a validation error.

- o Only one active Career record should be checked off as "Is Main Job." Staff that splits their time 50/50 must have one Career record designated at Is Main Job. This is required for SIF EPIMS.

- o The staff member's total FTE should be split across the active Career records. Full time staff will typically total 1.0. This is required for SIF EPIMS. SIF EPIMS calculates FTE for Work Assignments by using the FTE for each Career Job Type and then divides it by the number of Work Assignments with that Job Type. With SIF, the FTE values for Work Assignments is no longer pulled from the individual Work Assignments.

- o Career records for Active Job Types must have an FTE value greater than 0 to send the Work Assignments in the SIF Transmission.

- o Career records needs correct SIF Job Types. Refer to iPass Help > SIF > Help > SIF Job Types for recommendations.

- o Exited staff have to be exited on or after 07/01/2019. Summer exits have to be set to 07/01/2019 for the Days Attending and Expected to be set to zero.

- o **TIP:** If SIF code values for Exited staff are not updating at DESE, remove the Career End Date and clear/send objects for MEPID to update. After confirming values have updated you can then add the Career End Date back.

- **Check all staff set to Report to DOE = No to make sure no staff that is required to be reported is marked incorrectly.** The default is Report to DOE = No for Staff. The DOE does not require you to report Cafeteria, Maintenance, or Custodial staff.

  Helpful Hint! To find staff members marked Report to DOE = No, go to iStaff Procedures and run the Staff Data Export with Report to DOE field selected and Selection Criteria set to Employee Status = Employed/Working.

- **Update the Career Records of all staff that have changed status since previous year EOY EPIMS Report.**
  - o Staff that "Exited" after the last day of the previous school year must have their Status updated on the Staff Profile screen <u>and</u> their Career Record must be updated with an End Reason and End Date between July 1 and the day before the first day of the new school year.
  - o *NOTE:* Teachers should be removed from course schedules and have the Room removed in their iStaff Profile **PRIOR to being exited**. If the schedule is not adjusted, Work Assignments will be generated.
  - o Staff that is out on "Leave" must have their Status updated on the Staff Profile screen.
  - o Staff that changed Job Types must have their Career Record adjusted to "End" their first Job Type and a new Career Record added for their new Job Type.
  - o Staff that moved buildings must have an End Reason and End Date added to end their career at the original and a new Career Record created for the new building.
  - o Staff that added or lost job responsibilities at another building must have a Career Record added for the new building or their Career ended for the old building. Be sure to adjust the FTE to reflect the proper breakdown at each building.

- o Staff that changed their FTE value must have their Career Record FTE value updated.

- **All Licensed staff should have "Licensed for Job?" checked off in their Career Record.**

- **Review the list of Staff that receives a Federal Salary Source and make selections as of October 2 on the MA DOE EPIMS Data screen.**

- **Review the schedule for your ELL, Title I, and other support services teachers to confirm they are linked to courses and/or students to generate Work Assignments.** The DESE does not require Work Assignments for OT, PT and SP&L Specialists.

- **VHS and Dual Enrollment courses should NOT report Teacher Work Assignments** – If you assign VHS and/or Dual Enrollment courses to a staff member to monitor, we recommend creating a fictitious teacher to schedule the students with (ie. VHS-[Teacher Name]). This teacher can be set to Report to DOE = NO since this type of monitoring teacher does not need to be reported in EPIMS. The monitoring teacher can be given access to that teacher using Assign Teacher Access.

  NOTE for SIF EPIMS: Work Assignment set to FTE = 0 are **NOT** excluded from the SIF EPIMS transmission. They will be reported. If the course must be reported in SCS (DOE Reportable Course Type) but not in EPIMS, create a non-reportable fictitious "Teacher" should be created and scheduled to teach the course. See recommendation given above.

- **Review the SR28 District Level Educator's Professional Teacher Status.** Review and update, if needed, the educator's current professional teacher status.

- **Update the SR38 Beginner Educator Identifier code for the start of the new school year.** This field is used to identify a staff member that is in their first year of experience in their primary job classification. All staff must be set to either No (00) or Yes (01).

- **Subject Area Course Codes in Work Assignments must match Course Catalog.** If a Subject Area Course Code has been adjusted in the Course Catalog after the Work Assignments have been generated, then the Subject Area Course Code in the teacher's Work Assignment must be updated on the staff member's MA DOE EPIMS screen. It this is not done you will get a cross validation error between SCS and EPIMS.

- **Check to make sure Central Office staff is being reported.** SIF transmission of non-school based staff requires the School Profile for Central Office be set to District = [District Name] and "State Reportable" is checked off. Go to Administration > School Resources > School Profile > Central Office.

New for 2019-2020:

- **DESE has added a new WA07 Job Type for Pathways Coordinator (Code 3333).** It is the responsibility of each iPass site to add this new Job Type. Go to iStaff Maintenance > HRS Job Types > Add in Job Type, State Code and place in Job Group = Administrator.

NEW for 2017-2018:

- **Starting with this End of Year transmission, a new validation will be added to check expected days of attendance (SR37) for staff who exited or started midyear.** The SR37 value should reflect a number consistent with the time the staff member was actually employed by the district. For example, if a staff member who exited midyear is reported with days expected for the full year, an error will occur.

- **WA13 – NCLB Instructional Paraprofessional Requirements:** This element has been discontinued. A value of 99 will be sent.

- **WA14 – Highly Qualified Teacher Status:** This element has been discontinued. A value of 99 will be sent.

- **WA15 – Subject Matter Competency:** This element has been discontinued. A value of 99 will be sent.

** Creating Work Assignments**

All SIF districts must run Export DOE EPIMS Data for the <u>first time</u> with Recalculate FTE and Reset Term Codes both set to YES to create Work Assignments for the current career assignments and Active Term 1 courses.

NOTE for SIF EPIMS: SIF EPIMS calculates FTE for Work Assignments by using the FTE for each Career record Job Type and then divides it by the number of Work Assignments with that Job Type. With SIF, the FTE values for Work Assignments is no longer pulled from the individual Work Assignments. The FTE values in the Work Assignment are only used for EPIMS submission via Legacy flat file upload.

After you run your EPIMS Export you will review and edit the EPIMS Staff Roster data and Work Assignments and update as needed.

- **Staff Roster and Work Assignments can be reviewed and edited in several different ways:**
  - **MA DOE EPIMS Data screen** – Edit Staff Roster and Work Assignment data for individual staff member.
  - **EDIT EPIMS Work Assignments screen** – Edit individual or multiple staff members.
  - **Staff Batch Data Entry screen** – Use this screen to update Staff Attendance and Evaluation fields for individual or multiple staff members.
  - **Career Batch Entry screen** – Use this screen can be used to review and update the Is Main Job, Licensed for Job and Highly Qualified fields.

- **Review your co-taught courses to confirm Job Classification (WA07) is correctly set to Co-Teacher.** If there is no selection for Co-Teacher you will need to add a Career record with the Job Type to the staff member's iStaff record. The DOE will only allow two Co-Teachers to be reported for a course.

  The DOE will allow the following combinations per class:

  - 1 Teacher (2305).

- o 2 Co-Teachers (2306).
- o 1 Teacher and Support Content Teachers (2310).
- o No more than two Support Content Teachers (2310) can be reported for a class.
- o Paraprofessionals can be assigned to a school and not to a particular course. If they are scheduled to a course, they are not included in the count of Teachers, Co-Teachers, or Support Content Teachers.

- **For schools that offer courses for a range of grade levels (ie. Grade 9-12), review the Grade by Course Section (WA09) and adjust to reflect the majority grade level enrolled in the course.**

  *SIF EPIMS Sites***:** The DOE sent the following update for 2017-2018: In SIF, the way grade level for a work assignment (WA09) is determined is that we reference the SCS and SIMS data, and get the grade level of the group of students in the section. If there are students from multiple grade levels in the section, we apply a WA09 value of "88" (multiple grades). This has caused issues for some districts that have many course/sections with students from more than one grade level, resulting in too many courses with a WA09 value of "88". So we have changed the logic to take the majority grade level of the students in the section and apply that to WA09, instead of applying the "88".

- **No Work Assignments should be reported for staff that oversees Virtual and Dual Enrollment Classes.**

  *SIF EPIMS Sites***:** Work Assignment set to FTE = 0 are **NOT** excluded from the SIF EPIMS transmission. They will be reported. If the course must be reported in SCS (DOE Reportable Course Type) but not in EPIMS, a non-reportable fictitious "Teacher" should be created and scheduled to teach the course. See recommendation given above.

- **Use the Batch Data Entry screen to review and update your Staff data fields.** This is an easy way to set a large group of staff to default values. Go to iStaff Procedures > Batch Data Entry > Select Fields to Update.

- **If you use iStaff Attendance you will need to reset your Attendance values for the October EPIMS Report.** The values submitted for staff reported in the previous EOY EPIMS are there until you clear them out.

  Step 1: For the October 1 report you need to adjust the number of Expected Days for your contract groups.

  Go to DOE ID Manager > Maintenance – DOE > DOE Fields > Fields and scroll down to Staff Employee Contracted Months. Click on the field name to open up the DOE field. Under Default Values you will see Codes that relate to total number of days for each contact group. Click on the Description to open up the DOE Value screen. Change the Code to equal the total Expected Days as of October 1. Click Submit to update. Repeat for each contact group.

Step 2: Refresh the attendance values based on the current year's iStaff Attendance.

Go to iStaff Procedures > Batch Data Entry > Select Field to Update = Days Worked (SR36) and Days Expected (SR37). Enter a zero (0) in the default value box at the top of the Days Worked and Days Expected column and click on the copy down icon (blue overlapping pages) to fill all the boxes with a 0. Submit the screen. Districts that use iStaff for attendance will have the new values auto-populate the boxes. Submit the screen to save the new values. Click Next at the bottom of the screen to load the next list of staff

- **If you do NOT use iStaff Attendance you will need to import the October values for the Staff Days in Attendance (SR36) and Days Expected (SR37).** Import your Staff Attendance Data using iStaff Procedures > Import Staff Data. When you import you must select Staff Data Record format = MA EPIMS Staff Roster. You may also use Staff Data Batch Entry screen to review and update.

  NOTE: All 6 Identifying fields must match 100% to the data in the iStaff Database. Meaning in order to import any data into iStaff the Employee ID, First Name, Middle Name, Last Name, DOB and Gender must be the same in both iStaff and the file you want to import. All 6 fields must match 100% to insure that the teacher, person and user records are linked together and updated properly. For more information please refer to the *iStaff DOE EPIMS Help Document* found in iPASS Help > DOE ID Manager > Help > EPIMS Sub Categories Folder.

- **Set the Staff Evaluation fields (SR29-SR33) to the correct values for October reporting.** Check the EPIMS Handbook or with your DESE Rep to confirm the values that should be submitted. The SR29-SR33 fields should be set to "99 – Not Applicable" unless you are submitting evaluation data missed in the previous EOY EPIMS report.

- *SIF EPIMS Sites:* **Select the new SIF "Teaching Assignment Code."** In addition to the original WA08 Other Teaching Assignment Code, be sure to select the appropriate SIF Teaching Assignment Code for the Work Assignment. This is specific to the course and is related to the subject of the course being taught.

Helpful Hint! The Edit EPIMS Work Assignment screen, filtered by Department, can be used to update multiple course section Work Assignments.

Common SIF EPIMS Errors:

- **EPIMS4001 – Record reported more than once in SR file**. Check to make sure there is only one active Career record set to Is Main Job = Yes. Correct this and send StaffAssignment object again. If this does not clear the error, it is likely that multiple Career records were sent over with Is Main Job = Yes and are now "stuck" and you will need to ask the SIF Help Desk at the DOE to delete your EPIMS data so that you can resend all of the objects again.

- **EPIMS6206 – MEPID needs to be reported once in SR file.** This is related to the error above. Check to make sure that only on active Career record is set to Is Main Job = Yes.

- **EPIMS6128 – Not Applicable work assignment (WA08) not applied as required.** Check the code combination for WA08 and WA07 in the Work Assignment. If WA07 = 2305, 2306, 2307, 2308, 2310, 2325, or 4100, then WA08 cannot be 000 (not applicable), and if WA08 = 000, then WA07 cannot be 2305, 2306, 2307, 2308, 2310, 2325, or 4100.

- **EPIMS6150 – Subject Area-Course (WA10) not valid for Work Assignment (WA08) and Job Classification (WA07).** Check to make sure the Subject Area Course code in the Work Assignment matches the one in the Course Catalog. If the code is correct in the Course Catalog you will need to update the Work Assignment. This can be done on the DOE EPIMS Data screen by checking the Reset all Subject Area/Course Codes. If the code is correct in the Work Assignment is correct, the Course Catalog will need to be updated. Note that changes to the Course Catalog will affect your SCS data records.

- **EPIMS6215 – All individuals reported as active in the previous collection must have a staff roster record in current collection.** Staff that exits after the end of the school year must have a Career End Date between 07/01/2019 and the day before the first day of the next school year. End Dates entered in June will not be included.

- **EPIMS6225 – Only one working Teaching assignment (WA07=2305 or 2307) may be reported for a class.** Check the course to see how many teachers are scheduled to teach the course. If two teacher are scheduled, the Work Assignments for both teachers must have WA07 Job Classification set to Co-Teacher.

- **EPIMS6229 – The number of Co-Teaching assignment records (WA07=2306 or 2308) reported for a class must not equal 1.** Check to see if there is another teacher for the course. If yes, the other teacher must be set to Co-Teacher. If no, then set the sole teacher to Teacher (2305).

  NOTE: The DOE will allow the following combinations per class: 1 Teacher (2305); 2 Co-Teachers (2306); 1 Teacher and Support Content Teachers (2310); No more than two Support Content Teachers (2310) can be reported for a class. If your school has

more than 2 Co-Teachers required for a course (ie. Vocational School Shop classes), you will need to contact your DOE Rep for an exception.

- **SIF1166 – Teaching StaffAssignment missing StaffSectionAssigment with matching role.** Each active Career record Job Type must have a Work Assignment reported. Check to see if the staff member has a Career Job Type that is not being used this school year, such as Co-Teacher, and End the Career.

Helpful Hint! Use the DOE's EPIMS Error List to get more detail on the error reported on the SIF Validation report. The Error List will provide code validations that can help you identify the issue and make changes that will clear the error. The EPIMS Error List can be found on the DOE website at: http://www.doe.mass.edu/infoservices/data/epims/

EPIMS SIF Objects

- EmploymentRecord
- StaffAssignment
- StaffEvaluation
- StaffPersonal
- StaffSectionAssignment

Helpful Reports:

- **MA DOE EPIMS Export** – Run this report and view it in the **Import/Export Viewer** to look for missing data. Missing fields will be highlighted in red.

  Go to DOE ID Manager > DOE Import/Export > Import/Export Viewer. Select EPIMS Export file.

- **Staff Data Export** – To find staff members marked Report to DOE = No, go to iStaff Procedures and run the Staff Data Export with Report to DOE field selected and Selection Criteria set to Employee Status = Employed/Working. Review all the Report to DOE = NO to determine if they need to be updated. The DOE does not require you to report Cafeteria, Maintenance, or Custodial staff.

EPIMS Fields Reference Table with SIF Objects:

Staff Roster (Legacy)		SIF Object
SR01	Massachusetts Education Personnel Identifier (MEPID)	StaffPersonal
SR02	Local Employee Number	StaffPersonal
SR03	License / Certification Number	StaffPersonal
SR04	First Name	StaffPersonal
SR05	Middle Name / Middle Initial	StaffPersonal
SR06	Last Name	StaffPersonal

SR07	Date of Birth	StaffPersonal
SR08	Race-Ethnicity	StaffPersonal
SR09	Employment Status at Time of Data Collection	EmploymentRecord
SR10	Reason for Exit	EmploymentRecord
SR11	Date of Hire	EmploymentRecord
SR12	Federal Salary Source 1	EmploymentRecord
SR13	Percent of Federal Salary Source 1	EmploymentRecord
SR14	Federal Salary Source 2	EmploymentRecord
SR15	Percent of Federal Salary Source 2	EmploymentRecord
SR16	Federal Salary Source 3	EmploymentRecord
SR17	Percent of Federal Salary Source 3	EmploymentRecord
SR18	Degree Type 1	StaffPersonal
SR19	Degree Institution 1	StaffPersonal
SR20	Degree Subject 1	StaffPersonal
SR21	Degree Type 2	StaffPersonal
SR22	Degree Institution 2	StaffPersonal
SR23	Degree Subject 2	StaffPersonal
SR24	Degree Type 3	StaffPersonal
SR25	Degree Institution 3	StaffPersonal
SR26	Degree Subject 3	StaffPersonal
SR27	Exit Date	EmploymentRecord
SR28	District Level Educator's Professional Teacher Status	EmploymentRecord
SR29	Overall Annual Summative Evaluation or Formative Evaluation Rating	StaffEvaluation
SR30	Standard (1) Evaluation Rating	StaffEvaluation
SR31	Standard (2) Evaluation Rating	StaffEvaluation
SR32	Standard (3) Evaluation Rating	StaffEvaluation
SR33	Standard (4) Evaluation Rating	StaffEvaluation
SR34	DISCONTINUED	
SR35	DISCONTINUED	
SR36	Staff Days of Attendance	StaffAssignment
SR37	Staff Expected Days of Attendance	StaffAssignment
SR38	Beginner Educator Identifier	StaffAssignment
Work Assignment (Legacy)		
WA01	Massachusetts Education Personnel Identifier (MEPID)	StaffPersonal
WA02	Local Employee Number	StaffPersonal

WA03	First Name	StaffPersonal
WA04	Middle Name / Middle Initial	StaffPersonal
WA05	Last Name	StaffPersonal
WA06	Assignment Location Code	SchoolCourseInfo
WA07	Job Classification	StaffAssignment, StaffSectionAssignment
WA08	Teacher / Paraprofessional Assignment	StaffAssignment, StaffSectionAssignment
WA09	Grade	SectionInfo
WA10	Subject Area-Course Code	SchoolCourseInfo
WA11	Class Section	SectionInfo
WA12	Full Time Equivalent (FTE)	StaffAssignment
WA13	DISCONTINUED	
WA14	DISCONTINUED	
WA15	DISCONTINUED	
WA16	Course Term	SectionInfo
WA17	Term Status at Time of Collection	TermInfo