

## Helpful Hints for EOY EPIMS Report 2015

The Support Team has prepared a list of helpful tips and recommendations to prepare and report your data for the End-of-Year EPIMS Report. Both SIF and Non-SIF Districts are submitting EPIMS via Legacy flat-file submission.

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

- 1. The EOY EPIMS data collection is run using the day BEFORE the last day of school.** Go to iStaff Biographical > iStaff Procedures – iStaff Bio > iStaff Configuration screen. Set the EPIMS Export As-of Date to the day BEFORE the last day of school for the first school finishing in your district. This will make sure the Staff Roster and Work Assignment files reflect all staff changes since October 1 and contain the correct data for the End-of-Year reporting period.
- 2. Make sure that your school calendars and Academic Year Settings have the correct Start/End Dates for the School Year & Terms and that your day count as of the last day of school is correct.** Check each school calendar to confirm the school year Start/End Dates are accurate and that all holidays, vacation days, and snow/weather 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. The End Date for Term3/Quarter 4 must match the last day of school.

- 3. Make sure all new (reportable) Staff members that joined the school district since October 1 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.
- 4. Check all staff set to Report to DOE = No to make sure no reportable staff is marked incorrectly.** The default is Report to DOE = No for 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.

- 5. Update the Career Records of all staff that have changed status since October 1st EPIMS Report.**
  - Staff that “Exited” after October 1 must have their Status updated on the Staff Profile screen and their Career Record must be updated with an End Reason and End Date.  
**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.
  - Staff that went out on “Leave” after October 1 must have their Status updated on the Staff Profile screen.
  - Staff that changed Job Types after October 1 must have their Career Record adjusted to “End” their first Job Type and a new Career Record added for their new Job Type.
  - Staff that moved buildings after October 1 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.
  - Staff that added or lost job responsibilities at another building after October 1 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.
  - Staff that changed their FTE value after October 1 must have their Career Record FTE value updated.

4. For staff with multiple active Career Records, make sure “Is Main Job?” is checked off for the correct Career Record.
5. All Licensed staff should have “Licensed for Job?” checked off in their Career Record.
6. All Highly Qualified staff should have “Highly Qualified?” checked off in their Career Record.
7. Review the list of Staff that receives a Federal Salary Source and adjust the selections on the MA DOE EPIMS Data screen if needed.
8. 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.
9. VHS and Dual Enrollment courses – 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.

Run Export DOE EPIMS Data for the **first time** with Recalculate FTE and Reset Term Codes both set to YES to set all the Active/Inactive fields and to freeze the FTEs for the Inactive courses and adjust the FTEs for the active courses.

**NOTE:** Recalculate FTE will adjust the FTE for all staff scheduled to teacher courses. All non-course staff that have had an FTE change since October must have the FTE adjusted in the individual staff member’s MA DOE EPIMS screen. This can either be done by manually updating the FTE field value to the new value or you can check off “Delete this Work Assignment” and Submit to pull new FTE value from Career Record. Submit again to save the new FTE value.

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

10. 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.
11. Review your co-taught courses to confirm Job Classification (WA07) is correctly set to Co-Teacher.
12. 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.
13. If you have staff scheduled for courses that do not have to be reported (ie. Virtual or Dual Enrollment), you can set the FTE for the Work Assignment to 0 (zero). You can then set your EPIMS Export to run with “Exclude Zero FTE Assignments” to YES to exclude these staff Work Assignments. (Please see #9 above with recommendation for setting up VHS and Dual Enrollment teacher.)
14. Import your Staff Evaluation Data using iStaff Procedures > Import Staff Data. When you import you must select Staff Data Record format = MA EPIMS Staff Roster.

**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.

**15. Use the Batch Data Entry screen to review and update your Staff Evaluation data fields (SR28-SR35).** This is an easy way to set a large group of staff to default values (ie. 99 – Not Applicable).

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

Go to iStaff Procedures > Batch Data Entry > Select Field to Update of Days Worked (SR36) and Days Expected (SR37). Enter a 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.

**17. If you do NOT use iStaff Attendance you will need to import the EOY 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.

**Re-run MA DOE EPIMS Export with Recalculate FTE and Reset Term Codes set to No to create your Staff Roster and Work Assignment files for upload to the DOE.**

**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:**

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

SR06	Last Name
SR07	Date of Birth
SR08	Race-Ethnicity
SR09	Employment Status at Time of Data Collection
SR10	Reason for Exit
SR11	Date of Hire
SR12	Federal Salary Source 1
SR13	Percent of Federal Salary Source 1
SR14	Federal Salary Source 2
SR15	Percent of Federal Salary Source 2
SR16	Federal Salary Source 3
SR17	Percent of Federal Salary Source 3
SR18	Degree Type 1
SR19	Degree Institution 1
SR20	Degree Subject 1
SR21	Degree Type 2
SR22	Degree Institution 2
SR23	Degree Subject 2
SR24	Degree Type 3
SR25	Degree Institution 3
SR26	Degree Subject 3
SR27	Exit Date
SR28	District Level Educator's Professional Teacher Status
SR29	Overall Annual Summative Evaluation or Formative Evaluation Rating
SR30	Standard (1) Evaluation Rating
SR31	Standard (2) Evaluation Rating
SR32	Standard (3) Evaluation Rating
SR33	Standard (4) Evaluation Rating
SR34	Impact on Student Learning Growth and Achievement Rating
SR35	Educator Evaluation Plan
SR36	Staff Days of Attendance
SR37	Staff Expected Days of Attendance

<b>Work Assignment</b>	
WA01	Massachusetts Education Personnel Identifier (MEPID)
WA02	Local Employee Number
WA03	First Name
WA04	Middle Name / Middle Initial
WA05	Last Name
WA06	Assignment Location Code
WA07	Job Classification
WA08	Teacher / Paraprofessional Assignment
WA09	Grade
WA10	Subject Area-Course Code
WA11	Class Section
WA12	Full Time Equivalent (FTE)
WA13	NCLB Instructional Paraprofessional Requirements
WA14	Highly Qualified Teacher Status
WA15	Subject Matter Competency
WA16	Course Term
WA17	Term Status at Time of Collection