


# Five Year Forecast Submission Checklist

## NWOCA-Five Year Forecast Submission Procedure

 The district is responsible for the entire five year forecast submission process to ODE. There is no need to notify NWOCA unless assistance is needed.

### Forecast Line Numbers:


- Level 1 warning errors regarding rounding have been removed and replaced with fatal errors for differences outside an acceptable threshold. These exceptions, along with any missing rows, will cause the collection to not be submittable to ODE. Please refer the EMIS Manual [Section 7.2](#) for a listing of the line numbers permitted in the forecast.

### Forecast Assumptions

- Forecast assumptions (a.k.a notes) must be uploaded and included at the time you 'CERTIFY & SUBMIT' the forecast via the data collector. (Forecast assumptions must be in TXT or PDF format).

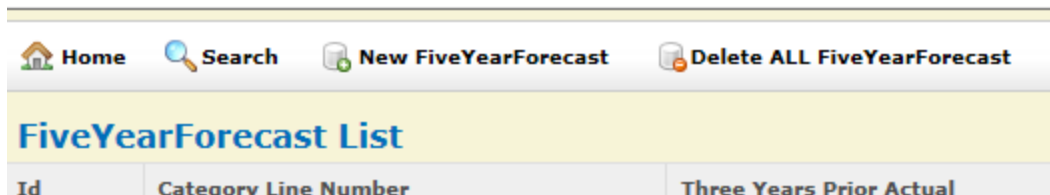
The following procedure outlines the steps to be taken to submit your Five Year Forecast and Assumptions to ODE via the EMIS-R Data Collector.

### 1) Log into [EMISFFE Version 2.3-12](#) to convert your five year forecast spreadsheet to an EMIS-R supported file layout.


 If your password has expired or you have forgotten your password, you can change and/or reset your password via the the "Forgot Password" link on the EMISFFE Log In box. If you do not have an EMISFFE account or you cannot recall your username, please contact our EMIS department [MAIL\\_STAFF\\_EMIS@NWOCA.ORG](mailto:MAIL_STAFF_EMIS@NWOCA.ORG) for further assistance. If your email address has changed, please contact our EMIS department so they can update your account.

### 2) Delete any records currently in the Five Year Forecast (QF).

- Do so by clicking on the Five Year Forecast (QF) at the bottom of the list
- At the top click on 'Delete ALL FiveYearForecast'



### 3) Import Five Year Forecast Spreadsheet

 Spreadsheet must be saved as .CSV file

- Click on 'Five Year Forecast Spreadsheet Import'



- Line up the column content to the appropriate column letter on your spreadsheet. The number of rows at the top means the number of rows listed before the first forecast line number. For example if forecast line 1.01 is in row 12, then your number of rows at the top is 11.

### Import Five Year Forecast CSV File

Number of Header rows at top	11
Column Contents	Column
Line Number	A
3 Years Prior Actual	C
2 Years Prior Actual	D
1 Year Prior Actual	E
Average Change	F
Forecast Year 1	G
Forecast Year 2	H
Forecast Year 3	I
Forecast Year 4	J
Forecast Year 5	K

Browse...

- Browse to find your forecast .CSV file
- Click on 'Import CSV file'
- If you want to check to make sure your numbers are in the 'Five-Year Forecast (QF)'. Click on 'home' then 'Five-Year Forecast (QF)'.

#### 4) Export Forecast

- Click on 'Export Data' at the top of the listing on the main EMISFFE menu
- Select the appropriate Fiscal Year and the P - Five Year Forecast reporting period. It automatically selects the 'QF' record. (Reminder: Forecast notes must be entered in the data collector.)

### Export Options


**Fiscal Year:** 2020

**Data Set:** P - Five Year Forecast

**Records to Export:**


- GI - Student Demographic
- GJ - Student Demographic Race Detail
- FD - Student Attributes - Effective Date
- FN - Student Attributes - No Date

- Click Export file
- Click 'Save' to save this DISTRICTIRN\_FFE.SEQ file to a folder that you can find easily to upload the file into EMIS-R (data collector) later

 An authorized person in the district (EMIS Coordinator, Treasurer, etc) will be running the data collection process and submitting the data to ODE via EMIS-R. The EMIS-R roles include the "collector", "reviewer" and "submitter". As Treasurer, you need to communicate with your EMIS Coordinator as to what role(s) you need in the process.

Below are the remaining steps if you are responsible for uploading and collecting/submitting.

#### 5) Access and log into the [EMIS-R data collector website](#)

 If you have forgotten your username/password or it has expired please contact the EMIS department at [mail\\_staff\\_emis@nwoca.org](mailto:mail_staff_emis@nwoca.org) or create a ticket to their department.

#### 6) Upload the Forecast flat file

- Click on **"Other Data Sources"**
- Locate the Data Source for the Forecast period and click on **"Manage"**
  - Delete any files currently in the data source for the 'Forecast'
- Click **"Upload File"** to select the forecast flat file currently stored on your computer (i.e. DISTRICTIRN\_FFE.SEQ flat file from EMISFFE)
  - **Browse** to the file on your computer you want to upload into EMIS-R and click **Open**.
  - Then click on **"Upload"**
  - This completes the uploading of a file into EMIS-R.

### 7) Collecting Forecast Data in the EMIS-R Data Collector:

- Click on the **"Collection Requests"** tab in the data collector and locate the Forecast (period P) manifest. Click on **"Start Collection"**.
- Make sure the **correct data source (Forecast)** is checked. Then click on **"Start Data Collection for all items checked below"**.
  - Click the **"Collection Status"** tab to check the status of your current collection
  - Once the collection is 'complete', click on the **"Collection Request Tab"** and then click on **"Prepare"** (under the forecast manifest) to prepare the collection for review.



If the collected data encountered errors, a message will display with a direct link to the **"Level I Validation Report"**. If the errors warrant changes to be made in the source system, you will need to start the process over with cancelling the current collection and then uploading the corrected file and re-collecting the data.

### 8) Previewing collected data

- Click on the "Collection Request" tab and then click on 'Preview Prepared Data' under 'Prepare Outputs' to view the data collected.
- Checkmark the Detail and Missing boxes and a File Format of "CSV". Click on 'Generate Preview'.
  - It will display a list of the records included in the collection. Scan the "invalid" column for any records with invalid data. If you double-click on a record type listed, it will display the details of the record via EXCEL.
  - When viewing a record type via EXCEL, a column labeled "Record is Valid" indicates whether or not the record will be included in the submission.

### 9) Submitting the Forecast Data to ODE

- Once you determine the data is ready to be submitted to ODE, click on the "Collection Requests" tab and then click on "Certify and Submit".
- **At this time, attach the forecast assumptions/notes. Click on 'BROWSE' to select the file (may be in .TXT or PDF format) and then click on 'upload file'. The 'Required File Status' should change to show the file was uploaded and will be included with the submission.**

This collection request requires attaching a file to this submission. Submission without this file is not possible. Select the file to upload.

**File upload is: required**

This file contains the assumptions regarding the Five Year Forecast.

**File To Upload:**  No file selected.      **Required File Status:** ✔ File Uploaded

File: '2018P\_test\_sub2.pdf' will be included with the submission

[Upload File](#) | [Remove File](#)

- Once the assumptions/notes have been successfully uploaded, checkmark the "I certify this collection" box. Add any comments if desired.
- Click on "Certify & Submit" at the bottom left-hand side of the screen. The data will then be submitted to ODE.
- To review the status of your submission, click on the "Submission" tab. Click on the arrow to the left of the forecast reporting period to display the current status of the submissions you processed.

### 10) Verifying both Required Files were successfully submitted to ODE

- To verify that both your forecast and assumptions were submitted to ODE, click on the "Archives" tab.
- In the "Collections Request" box, select the appropriate 'P' period. The Archive Type should be defaulted to 'Submissions Only'. Click on 'List Archives' to display the zip file.

Collection Requests
Collection Status
Submissions
Progress
Reports
Archives
Preferences
D

View Archives

#### View Archives

To view prior submissions or previews archives, choose the appropriate filter options below and click on the List Archives link. Click on an archive file to download it.

For deleted Collection Requests you may be able to find the archived submissions and previews using the Files tab.

**Filter Options**

**Collection Request:** FY18-P-FYF 2 May      **Data Set:** All      **School Year:** All      **Last Activity Within:** All

Show closed collections

**Archive Type:** Submissions Only       Combine all archived files into a single .zip file per Collection Request




[List Archives](#) | [Restore Defaults](#)

Archive File Name	Collection Request	Type	Submission	Version	Date Archived	File Size
<input type="checkbox"/> <a href="#">Submission_2018P2MAY_2.zip</a>	FY18-P-FYF 2 May (2018P2MAY)	Submission	1.1	2	Today	(9580 bytes)

[Select All](#) | [Select None](#)

- Click on the 'zip' file to save the zipped contents to your computer.
- Once you open the zip folder, it will include:
  - Assumptions in PDF format
  - Forecast data (QF\_FORECAST\_REC) in CSV format
  - 'Submitted' file which includes a total number of forecast line records included in the submission

staff (Z:) ▶ Misc Reports ▶ 2018P2MAY-2018P2MAYF2C44B194948FCE8ACAF670-2-1.1-SUBMISSIO

Name	Type	Compressed size
 ASSUMPTIONS SAMPLEVILLE CITY...	Adobe Acrobat Document	11 KB
 QF_FORECAST_REC	Microsoft Excel Comma S...	2 KB
 Submitted_1	Microsoft Excel Comma S...	1 KB