Employment Information System (EIS) User Manual

Revised June 2015
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## Change History

<table>
<thead>
<tr>
<th>Change Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/27/2013</td>
<td>Created User Manual</td>
</tr>
<tr>
<td>05/06/2014</td>
<td>Updated User Manual with 2014 System Changes</td>
</tr>
<tr>
<td>07/27/2015</td>
<td>Updated User Manual with 2015 System Changes</td>
</tr>
<tr>
<td>11/09/2015</td>
<td>Updated User Manual with 2016 System Changes</td>
</tr>
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</table>
Introduction

The Illinois State Board of Education (ISBE) Employment Information System (EIS) was created for the purpose of enabling school districts to do the following:

• add employees to the system, thereby assigning each an Illinois Educator Identification Number, or IEIN;
• collect Employment, Position, and Salary data for each licensed school employee;
• collect aggregate counts for each non-licensed employee;
• track employees from school to school within a district and within Illinois;
• collect timely and accurate data through standardized reporting.

Through EIS, ISBE can collect and then analyze employee-related information directly from districts. By utilizing the EIS web application in IWAS, authorized users at district-level entities, such as public school districts, regional offices of education, and special education cooperatives, can facilitate the entry of employee information.

The EIS application was created and is continually tested by the EIS team at ISBE, so it is designed to be a user-friendly application. Within this manual, you’ll learn how to perform your data entry role effectively to facilitate a culture of quality data.
Using Batch Process and Online Process

Within EIS, you can upload your data two ways: using online screens or batch templates.

Each lesson within this manual covers all the basic functions within EIS. For each function, there are two videos: one for entering data one element at a time, using the online screens, and one for entering data in aggregate, using the batch file templates.

We recommend going through each lesson in order, regardless of if your district plans on entering data online or with batch files. Going through each lesson will help you gain a well-rounded understanding of each function within EIS.
Using this Manual

The EIS User Manual serves as an introductory guide to the EIS application. Within this manual you will find seven lessons, each building upon the previous, which will introduce the novice user to the system and then the basic and most used functions. Each lesson comes with a corresponding video which can be viewed in tandem with the print lesson, taking you through each screen. The videos can be found here.

Lesson #1: Getting Acquainted with EIS
*In Lesson #1, we’ll explore how to access EIS through ISBE.net and how to log on to the system. We’ll also provide a brief tour of each tab in EIS. This introductory lesson is a perfect place for the novice user to begin.*

Lesson #2: Adding an Employee, Position, and Work Location Online
*In Lesson #2, we’ll explore the most frequently used functions of EIS: adding an employee, position, and work location online, using the screens in IWAS. This lesson is helpful for those who need to learn how to enter a single employee or a small handful of employees into EIS.*

Lesson #3: Adding an Employee, Position, and Work Location Using Batch Uploads
*In Lesson #3, we’ll explore adding an employee, position, and work location using the downloadable Excel batch templates. This technique is useful if your staff is entering large groups of employees.*

Lesson #4: Adding a Salary Online
*In Lesson #4, we’ll explore adding salaries online using IWAS. This function is useful if you have just a few salaries to enter or edit at a time.*

Lesson #5: Adding a Salary Using Batch Uploads
*In Lesson #5, we’ll explore adding salaries using the downloadable Excel batch templates. This technique is useful if your staff is entering large groups of salaries.*

Lesson #6: Edit/Remove/End An Employee Online
*In Lesson #6, we’ll explore editing, ending, and removing an employee online, using the screens in IWAS. This lesson is helpful when you need to edit or end existing records, or remove records that have been entered by mistake.*

Lesson #7: Data Cleanup Using Dashboard and Reports
*In Lesson #7, we’ll explore utilizing the aggregate counts on the Dashboard, in addition to the Reports, to ensure that your data is as clean and error-free as possible.*
A Note on the Lessons

Both basic and more complex functions within EIS require a thorough adherence to the process. This manual shows you every single screen you should encounter when performing any function in EIS. **Therefore, please take care to follow the manual exactly,** especially when it comes to saving your batch files and submitting employee edits online. Otherwise, if you get ahead of the steps in the manual, you may find that you need to backtrack and re-do certain steps.
IWAS User Access

EIS has multiple-level users, as defined by the IWAS System. Your role will be governed by the IWAS user level assigned to you. For more information on accessing IWAS, please consult the IWAS user guide located here.

The levels of IWAS users for EIS are as follows:

**Level 1: View-Only:**
The View-Only level grants access to district personnel that enables them to view, but not edit, the district-level entity. “View-Only” users may view the following system functions:
- View Employment
- View Position
- View Salary
- View Linked Courses
- View Reports
- View Noncertified Staff
- View Employee Evaluations

**Level 2: RCDT Administrator (District Administrator):**
The RCDT Administrator level grants access to all EIS features, and is assigned by ISBE to the chief administrator of the district-level entity. From there, the chief administrator can authorize other district personnel to have this level of access, for data submission purposes. RCDT Administrator users may perform the following system functions:
- Create/Update/View Employment
- Create/Update/View Position
- Create/Update/View Salary
- View Linked Courses
- View Reports
- Upload Batch Files
- Download Batch Files
- Create/Update/View Noncertified Staff
- Create/Update/View Employee Evaluations

**Level 3: ISBE View-Only**
The ISBE View-Only level grants access to ISBE personnel that enables them to view, but not edit, data for the entire state. ISBE View-Only users may view the following system functions:
- View Employment
- View Positions
- View Salary
- View Linked Courses
- View Reports
- View Noncertified Staff
- View Employee Evaluations
Performing Searches using Matching Logic

The first step in entering any new employee record should begin with searching for the employee. This ensures that duplicate records of any one employee will not be created.

EIS uses matching logic within the initial Search Employee function. When you first search for an employee, the system will cross-check your employee’s legal last name, legal first name, and date of birth against the current Educator Licensure Information System (ELIS) data. If there is a match for two out of those three mandatory fields, that record will appear as a potential match.

Additionally, the system uses SoundEx techniques to search for existing records. This technique ensures that names that are spelled differently but sound the same will be identified as potential matching records.

For instance, imagine the following record currently exists in the EIS database:

First Name: Cindee Lou  
Last Name: Who 
Date of Birth: 04/04/1973

If you wanted to enter a new employee named Cindy Loo Hoo, born April 4, 1973, into the database, you would perform a search for that name:

First Name: Cindy Loo  
Last Name: Hoo  
Date of Birth: 04/04/1973

The search system will recognize that, although the first name is spelled differently in the two records, these records are potential matches, since at least 2 out of the 3 mandatory criteria (legal last name, legal first name, and date of birth) are the same, and the names sound the same.

At this point, you would select the pre-existing record and check its social security number against the new employee information you were adding. If the social security numbers are the same, then you’ll know the record for the employee already exists. If the numbers are different, you’ll know it isn’t the same person, and you can continue to create a new record.
Lesson #1: Getting Acquainted with EIS

*Please click here to view the video version of this lesson.*

In this lesson, we’ll discuss the absolute basics of Employment Information Systems (EIS). This lesson is suited for complete beginners, and will cover accessing EIS through IWAS along with a brief description of each tab in the system. Let’s get started by accessing IWAS through ISBE.net.

Clicking on IWAS will direct you to the log in screen. Here, enter your username and password. If you don’t know your username and password, check with your administrator. Each administrator sets access and privilege rights, so they’ll be the ones to check with when logging on to IWAS for the first time.
Upon logging in to IWAS, you’ll be redirected to your IWAS homepage. Here you can, among other things, access unread messages, check the status of items that pend approval, and access all systems your administrator has granted you access to. To see those systems, click “System Listing” from the left-hand navigation panel.

Once you’ve selected “System Listing,” you’ll see a list of all systems you have access to. For this tutorial, you’ll be using Employment Information Systems, or EIS, so select that from the options.

Note: your screen will look slightly different than the screen below, since these screenshots were taken within a section of IWAS for training. Therefore, you won’t have several “EIS” applications to choose from.
Now, you’ll be redirected to your EIS dashboard. On your dashboard, you can view information on the employees in your district. You can view aggregate counts of your employees, position records, and more. You can view information by individual years or by individual schools. Just select the school you want information about from the “Work Location” drop down box.

You can also see all the different tabs accessible in the system. When you make changes in any of the corresponding tabs, you’ll see that change reflected on the aggregate counts on your Dashboard.

Again, note that your screen will look slightly different than the screenshot below, although the main attributes will be the same.

Now that we’ve familiarized ourselves with the Dashboard, let’s look over each different tab in the system. We’ll begin with “Employment/Position.”
A Brief Explanation of Each Tab

Employment and Position:

This is what the “Employment and Positions” tab looks like. Here, you can search for an employee, and you can also see a list of your employees under “Employees for School Year 2015.” Note that the list of employees on this tab only displays 100 records. Therefore, if you’re looking for a specific employee, it is always better to find them using the search function than to hunt for them manually in the list. You can search for an employee by using the box on the top of this tab. Finally, this tab is also where you can utilize the “Add New Employee” function, which is one of the basic functions of EIS, and will be explained in Lessons #2 and #3, on pages 18 and 24, respectively.
The Salary tab is where you can add salaries for each employee in EIS. As in the Employment/Position tab, you are able to search for employees by school year, work location, position, salary status, IEIN, SSN, or last name. Once you’ve made a search, all employees that meet the criteria you searched by will appear under “Employees with Positions for School Year 2016.” As you can see, in the above example, a search hasn’t been made, so there are no employees listed.
You may also utilize the Search function in the Courses tab. This screen allows you to search for employees through courses, specifically school year, work location, position, and as always, IEIN, SSN, or last name. Just like in the Salary tab, the results of your search will display under “Teachers for School Year 2015.”
Using the Reports tab, you can generate useful reports based on the data you’ve entered into EIS. However, if you’re just starting to enter data for the new year, and you try to generate a report, you will likely find that it doesn’t feature much data. That’s because the reports generated from this tab will **only include data you’ve entered**. If you’ve only entered twenty-five employees, for example, your school-wide reports will only feature those employees.

However, once all employees are entered, the reports will be helpful for assessment purposes. You can generate a roster of your employees, individual employees, missing positions, position details, and much more. For more information on Reports and how they can be utilized to clean data, please see Lesson #7: Data Cleanup using Dashboard and Reports on page 55.
As mentioned in the “Using Batch and Online Process” section, the batch file feature is valuable for moderate to large sized districts. Instead of using IWAS to manually enter each employee, you can download one of ISBE’s pre-made EIS Excel templates, fill them out, and upload them at this screen. We’ll go into the specifics of that in Lessons #3 and #5, on pages 24 and 36. Basically, this feature enables you to upload the file, and then request and download the batch file after it’s been reviewed to correct any errors.
Noncertified:

In the Noncertified tab, you are able to view all employees that are noncertified. You can search for these employees by year. Note again that the totals displayed on this page will sum only the employees you have already entered into EIS. You can choose the “Add Noncertified Staff District Totals” function to add data and create a more comprehensive list.

Also note that the “Add Noncertified Staff District Totals” button is only available for a portion of the year, per federal reporting guidelines.
Lesson #2: Adding a New Employee, Position, and Work Location Online

Please click here to view the video version of this lesson.

Lesson #1 described accessing EIS and the basic tabs within the system. With that foundation in place, we’ll now discuss the function of adding or updating an employee, a position, and a work location. To begin, log into IWAS and access the Employment Information System, or EIS.

From the Dashboard, select the “Employment/Position” tab. On this screen, if you’re adding a new employee, select the “Add New Employee” button. Adding a new employee record is the first step in creating an employment record, so we’ll need to do that before we add a position or work location.
Upon selecting “Add New Employee,” a screen will pop-up that prompts you to search for your employee.

Your employee must exist with an IEIN in ELIS prior to creating an employment record for them in EIS. Therefore, search for your employee with this box, and if the employee is in ELIS, records that match what you have entered will appear and you can edit the existing record as needed. If the employee is not found in ELIS, the following screen will appear:

If you receive this message, you will need to ask your employee for their IEIN number, or obtain the IEIN from ELIS, and then search with that to proceed. If the employee is already in EIS, their record will appear, which you may choose to edit by selecting the employee and clicking “Next”. Make sure it is the correct employee.
You’ll be directed to the Demographics screen. On this screen, enter the requested information. Note that fields with a red asterisk are required. When you have finished entering the employee demographics, click “Submit.”

If you’ve entered your information correctly, a confirmation screen will appear that confirms your employee record has been created. Click “Close” to be redirected back to the Employment/Position screen.

Now, your new employee should be at the top of your list of employees. From this point, the process of adding a position or work location will be the same whether the employee record is new or existing.
To add a work location and position, click “Select” next to the employee’s name.

Then, you’ll be redirected to the Employment Summary screen. This will display all the demographic information you’ve just added for that employee. Now, we’ll need to add a position and work location. To add a position record, click “Add Position Record.”

A screen will pop up that will allow you to add a new position. The screen will change slightly after you select your category from “Position Category.” “Regular Education Instructional,” for instance, will display different positions than “Regular Education Administrative.” If you are unsure what category your employee falls under, please reference the Data Elements online. Also note that the employee’s position record start date has to be on or after their employment start date. Once you’ve filled out all the required information, click “OK.”
You’ll now see your Employee Position without a Work Location.

<table>
<thead>
<tr>
<th>Position Code</th>
<th>Position</th>
<th>Time Frame</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td>Teacher</td>
<td>Regular School Year</td>
<td>There are currently no Work Locations for this Position.</td>
</tr>
</tbody>
</table>

Note that each position must have **at least one** accompanying work location. If you try to click “Submit” before adding a work location, this message will appear in the upper left corner:

![Message](image)

To remedy this, we’ll add a work location. Within the position you’ve added, under “Locations,” click “Add Work Location Record.”
You’ll then be directed to a screen where you may add a work location. Select the specific location from the drop-down box by “Location,” or enter the 15-digit corresponding RCDTS code. Select “Primary Location” if this is the only position for that employee. If that employee has several locations, select “Primary Location” for only one location. You’ll enter the FTE of that work location, keeping in mind that FTE stands for “Full Time Equivalent,” and an FTE of 1.0 equals full time. Specify their grade level, and then click “OK.”

Once you’ve added all the work locations for your employee, click “Submit” to complete entering the record. **Note that unless you click “Submit,” the record won’t be saved.**

After you’ve clicked “Submit,” you have created an employee with both a corresponding position and work location.
Lesson #3: Adding a New Employee, Position, and Work Location Using Batch Uploads

Please click here to view the video version of this lesson.

In Lesson #2, we discussed the function of adding or updating an employee, position, and work location online through IWAS. In this lesson, we’ll discuss performing the same function, but this time we’ll use batch uploads. To decide which method is appropriate for you, please reference “Using Batch Process and Online Process” on page 4. To begin, visit http://www.isbe.net/eis and select the Excel Templates tab from the Resources panel on the right-hand side of the page.

For this lesson, we’re working within Employment, so click Employment and then select the template according to the system you’re working on: Macintosh or Windows. A box will pop up asking if you prefer to save or open. Click “Save As.” Do not click “Open.” Name and save your file. Note your screen may look slightly different than mine, depending on what browser you’re using. There are also PDFs under each section-- “Tips for Completing the Employment Template” and “Steps for Creating and Uploading Employment Data” that can help you with the more complex formatting aspects of this type of data entry process, should you need them.
Upon the completion of downloading the file, open the file in Excel. You can either open the file where you’ve saved it, or click the “Open” button that will pop up after your template has been downloaded. Once open, make sure to select “Enable Editing” so you may make changes to the document.

Now, you’ll need to make some edits to the header row before you continue. That’s B1, C1, D1, and E1.  

For B1, Record Count: If you can, put the number of records you are entering, but if you do not know the precise number, any number will be acceptable. We will use 1.  
For C1, Enter in this field what your file will be named when it is returned from ISBE. Therefore, put the name of your file and file extension here. I’ll use “WhovilleEmployment.” You must include the file extension, hence the “.csv.”  
For D1, enter today’s date.  
For E1, enter the district or school’s RCDTS. This is used by ISBE to validate that you have permission to upload and edit data.

Then, starting on Row 3, type over the sample data and populate the data until the rows are full. For a more in-depth explanation of each column, please see “Tips for Completing the Employment Template” for a written guide including explanations of each data element. Sometimes, you may not need to enter data for every column in the template. Please note that it is essential that you don’t delete any columns, even if a certain data element doesn’t apply to you. If you delete a column, the file will not upload correctly.
When you have finished populating the data, select “File” and “Save As.” We’re going to be saving twice, once as a regular Excel workbook, which can be edited later if your file has errors, and then as a Comma delimited or .csv file, which will be uploaded to IWAS.

We’ll save the workbook version first. Name your document the same thing you’ve entered in C1 (for me, that’s “WhovilleEmployment”) but, unlike earlier, do not type in the file extension. Select “Save.”
After you click “Save,” a compatibility checker will likely appear. Click “Continue” to bypass the compatibility checker and save the file.

Now that the document is saved as a workbook, it needs to be saved as a Comma delimited file, which is what we’ll upload into IWAS. Select “File,” then “Save As,” then select “Save As Type.” From there, select “CSV (Comma delimited).” Click “Save.”

After you’ve saved your template as comma delimited, a format checker box will appear. Click “Yes” to bypass the format checker.
Now, you must exit Excel to upload your file. Excel will ask you if you’d like to save. Select “Don’t Save,” since we’ve already done that.

We’ve entered our data into the batch template, we’ve saved it twice, and now we’re ready to upload it online. Navigate to the Batch File screen on EIS. Select “Choose File.” Select your file from where you have saved it on your computer.

You will see two files: the workbook version and the Comma delimited version. Select the Comma delimited (.csv) file. If you can’t see the file extension in your window, you can always tell the Comma delimited file based on the icon. The Comma delimited file will have a little letter on the icon. Select the Comma delimited file and click “Open.”
Click “Upload” to upload your file.

If your document is successfully uploaded, this confirmation box will appear. All this means is that your file is in the queue to process. It does not mean your individual data, however, is free from error. We’ll discuss this further in a moment.

If you get an error instead of the confirmation screen, that means your data has an issue in the header or number of columns. If you need assistance to determine how to resolve the error, call the EIS team (217-782-3950) and they will help you fix the issues. Your error message may look like one of the following screens:
Once your file is successfully uploaded, please check back for your download after 30 minutes. Click the “click here” link to refresh the list. Your download may take longer than 30 minutes to be returned to you, depending on the size of the document, but will never take longer than a day. Should your document still be unavailable for download after 24 hours, try re-uploading and then call the EIS team (217-782-3950) for assistance. Once your file is available for download, you will see it under the “Downloads” section. Click “Download” to retrieve your file.
Download your file, and right-click to open it in Excel. Scroll to the far right (you’ll want to use your arrow keys since the scroll bar in Excel never scrolls fully to either side) and see if the data itself has any errors. An error message will look something like this:

If you see an error, then go back to the template you saved as an Excel workbook, and, using the Comma delimited file as a reference, correct your errors. You’ll then save two copies again, as before: one as a workbook and one as a comma delimited file.
Continue doing this until your errors are fixed. Again, if you cannot seem to identify or correct your errors, refer to the “Tips for Completing Employment” PDF on the Batch Templates screen on the EIS site, and you may also call the EIS team (217-782-3950) for assistance. When your upload is successful, you’ll see a message that says “Position Records Created.”

Upon seeing this message, you’ll know your batch template has been successfully submitted.
In Lesson #3, we discussed adding employee information to EIS using Batch uploads. In this lesson, we’re going to explore adding salaries online in EIS. To begin, log on to IWAS and access EIS.

Select the “Salary” tab. Here, you’ll see a search box where you can look for specific employees, and below that, you’ll see a box of all your employees with their corresponding positions and work locations. We’re going to select an employee from this list. Note that only employees with positions and work locations will display in this list, so make sure you’ve added those elements before you proceed to Salary. (See Lessons 2 and 3 for an in-depth explanation of that process.) To add a salary, click “Select” to the left of the employee’s name.
Selecting “Edit” will open a box where you can edit Salary information. This box is where you’ll enter all of the employee’s salary details. As always, all fields with a red asterisk are required. Also, you’ll notice that the position must have a Position end date before a salary may be entered. The end date is the last date the employee worked in the current school year.

For a more in-depth explanation of each data element in this box, please refer to the Salary Data Elements on the EIS webpage here (click the link). The document will provide additional details for each field in this box. There is also an Excel chart on the webpage called “Salary Benefit Grid” that shows different salary data you may have, and whether or not that needs to be reported.

Using these documents, fill out the employee’s salary information, and once you’re finished, click “OK.”
You’ll now be redirected back to the employee’s Salary Screen. Here, you can review the data you’ve just entered. If your data needs editing, click “Edit.” If it is correct, click “Submit.”

Now, you’ll see the list of employees with positions and work locations for the current school year. You should see the employee you just edited, and their completed salary will display under “Salary Complete,” which confirms your data has been entered.

You may now repeat this process for any other employee salaries.
In Lesson #4, we discussed the function of adding or updating a salary online through IWAS. In this lesson, we’ll discuss performing the same function, but this time we’ll use batch templates. Batch templates are helpful when you’re uploading information about several employees at once. To begin, visit http://www.isbe.net/eis and select the Excel Templates link from the Resources panel on the right-hand side of the page. Today, we’re working within Salary, so click Salary and then select the template according to the system you’re working on: Macintosh or Windows.

A box will pop up asking if you prefer to save or open. Click “Save As,” not “Open.” Name and save your file. Note your screen may look slightly different than mine, depending on what browser you’re using. There are also PDFs under each section—“Tips for Completing the Salary Template” and “Steps for Creating and Uploading Salary Data” that can help you with the more complex aspects of this type of data entry process, should you need them.
Upon the completion of downloading the file, open the file in Excel. You can either open the file where you’ve saved it, or click the “Open” button that will pop up after your template has been downloaded.

Once open, make sure to select “Enable Editing” so you may make changes to the document.

Now, you’ll need to make some edits to the header row before you continue. That’s B1, C1, D1, and E1.

For B1, Record Count: If you can, put the number of records you are entering, but if you do not know the precise number, simply use 1.
For C1, Enter in this field what your file will be named when it is returned from ISBE. Therefore, put the name of your file here. I’ll use “WhovilleSalary.csv”. Note that you must include the file extension.
For D1, enter today’s date.
For E1, enter the district or school’s RCDTS. This is used by ISBE to validate that you have permission to upload and edit data.

Starting on Row 3, type over the sample data and populate the data until the rows are full. Again, for a more in-depth explanation of each column, please see “Tips for Completing the Salary Template” on the Excel templates webpage for a written guide including explanations of each data element.

Sometimes, you may not need to enter data for every column in the template. Please note that it is essential that you don’t delete any columns, even if a certain data element doesn’t apply to you. If you delete a column, the file will not upload correctly.
When you have finished populating the data, select “File” and “Save As.” We’re going to be saving twice, once as a regular Excel workbook, which can be edited later if your file has errors, and then as a Comma delimited or .csv file, which can be uploaded to IWAS.

We’ll save the workbook version first. Name your document the same thing you entered in C1 (for me, that’s “WhovilleSalary”) but do not type in the file extension. Select “Save.”
After you click “Save,” a compatibility checker will likely appear. Click “Continue” to bypass the compatibility checker and save the file.

Now that the document is saved as a workbook, it needs to be saved as a Comma delimited file, which is what we’ll upload into IWAS. Select “File,” then “Save As,” then “Save As Type.” From there, select “CSV (Comma delimited).” Click “Save.”

After you’ve saved your template as comma delimited, a format checker box will appear. Click “Yes” to bypass the format checker.
Now, you must exit Excel to upload your file. Excel will ask you if you’d like to save. Select “Don’t Save,” since we’ve already done that.

We’ve entered our data into the batch template, we’ve saved it twice, and now we’re ready to upload it online. Navigate to the Batch File screen on EIS. Select “Choose File.”

Select your file from where you have saved it on your computer. You will see two files: the workbook version and the Comma delimited version. Select the Comma delimited (.csv) file. If you can’t see the file extention in your window, you can always tell the Comma delimited file based on the icon. The Comma delimited file will have a little letter “a” on the icon. Select the Comma delimited file and click “Open.”
Click “Upload” to upload your file.

If your document is successfully uploaded, this confirmation box will appear. All this means is that your file is in the queue to process. It does not mean your individual data, however, is free from error. We’ll discuss this further in a moment.
If you get an error instead of the confirmation screen, that means your data has an issue in the header or number of columns. If you need assistance to determine how to resolve the error, call the EIS team (217-782-3950) and they will help you fix the issues. Your error message may look like one of the following screens:

Once your file is successfully uploaded, please check back for your download after 30 minutes. Click the “click here” link to refresh the list. Your download may take longer than 30 minutes, depending on the size of the document, but will never take longer than a day. Should your document still be unavailable for download after 24 hours, try re-uploading and then call the EIS team (217-782-3950) for assistance. Once your file is available for download, you will see it under the “Downloads” section. Click “Download” to retrieve your file.
Download your file and open it in Excel. Scroll to the far right (you’ll want to use your arrow keys since the scroll bar in Excel never scrolls fully to either side) and see if the data itself has any errors. An error message will look something like this:

```
1 M N F 1234567891: does not match user NCTE code +0100012732; EmploymentEnd Date = 01/01/2000 should be greater than or equal to EmploymentStartDate = 01/01/2020
```

If you see an error, then go back to the template you saved as an Excel workbook, and, using the Comma delimited file as a reference, correct your errors. You’ll then save two copies again: one as a workbook and one as a comma delimited file.
Continue doing this until your errors are fixed. Again, if you cannot seem to identify or correct your errors, refer to the “Tips for Completing the Salary Template” PDF on the Batch Templates screen on the EIS site, and you may also call the EIS team (217-782-3950) for assistance. When your upload is successful, you’ll see a message that says “Position and Salary Data Accepted.”

Upon seeing this message, you’ll know your batch template has been successfully submitted. You can confirm you file has been processed by viewing the aggregate numbers on the EIS Dashboard and verifying that the numbers reflect your batch file entries. For more information on this step, please see Lesson #7: Data Cleanup using Dashboard and Reports on page 55.
Lesson #6: Edit/Remove/End an Employee Online

*Please click here to view the video version of this lesson.*

In Lesson #5, we discussed the function of adding a salary using batch uploads. In this lesson, we’re going to go over how to edit, remove, and end an employee online.

First, however, it’s important to understand the difference between these functions:

Editing an employee, position, or work location is helpful when you need to tweak one or more portions of their employment record.

Ending an employee is appropriate when an employee is no longer employed in your school or district. Therefore, ending an employee is truly an edit function, as ending the employee is making an edit to their record.

Removing an employee will only be appropriate in very specific and rare circumstances, usually when the record itself was entered by mistake. The bulk of the focus in this lesson, therefore, will be how to edit and end employees in IWAS.

**Editing an Employee Online**

We’ll begin with the function you’ll use the most frequently: editing an employee. To begin, log on to IWAS and select EIS from the System Listing. You’ll then be redirected to the EIS Dashboard. Select the “Employment/Position” tab. Search or select the employee you’re editing. For more information on this step, please review Lesson #2: Adding an Employee, Position, and Work Location Online.

You will then be redirected to the Employee Summary screen. To edit basic information, select “Edit Employment Record.”
A pop up box will appear allowing you to edit the employee’s demographic and employment information. Click “OK” when finished.

To edit an employee position, select “Edit” on the left of their employee record under “Employee Positions within the District for School Year 2015” (or current school year).

This will trigger a pop up box called “Positions for School Year 2015.” Here, you can edit Position Category, Position, Time Frame, Start Date, End Date, and First Year. Note all fields marked with a red asterisk are required. When you are finished, click “OK.”
Lastly, to edit a work location, click “Edit” on the left of the appropriate Work Location.

A pop-up box called “Work Locations for Teacher,” (or administrator, depending on your employee) allows you to edit information pertaining to the specific Work Location. When you are done, click “OK.”

When the employment edits are complete, you click “Submit” at the bottom of the page. **Even if you make the changes to each individual pop-up screen but fail to click “Submit,” your changes will not be logged.**
Ending an Employee Online

Now, we’ll transition to a function you’ll use when an employee is no longer employed by your district. This could be for a variety of reasons, such as the employee resigned, retired, was terminated, or any other reason.

When in doubt over whether you should “end” an employee or “remove” one, keep the following in mind:

**Removing a record is only appropriate if the record was entered by mistake and never had a corresponding position or salary.**

Ending a record is appropriate if the employee previously worked for you, but is no longer employed by your district.

Ending a record is also appropriate if an employee was previously employed in a licensed position but is now employed in a nonlicensed position. In that case, their end reason would be “Terminated.” **This will not negatively affect their record.** Also note that in this situation, the now nonlicensed employee should be added to your nonlicensed aggregate counts.

To begin, log on to IWAS and select EIS from the System Listing. You’ll then be redirected to the EIS Dashboard. Click on the “Employment/Position” tab. Search or select the employee you’re editing. For more information on this step, please review Lesson #2: Adding an Employee, Position, and Work Location Online.

You will be redirected to the Employee Summary screen. To end employment, first select “Edit Employment Record.”
A pop-up box will appear where you may end the employment record. To end the employment, select an “End Reason” and “End Date,” then click “OK.”

Make sure you click “Submit” to save the changes.
Ending an Employee who Worked in Previous Years

If you have an employee who worked for your district in previous years but has not worked for you at all in the current year, you may think you need to remove that position. But actually, you will want to end their employment. Remember, removing a record is only appropriate when the employee never worked for your district or the record was entered by mistake.

To end the employee in this situation, you’ll navigate to their employment summary screen. Click “View Positions from Other Years.”

From here, a box will pop up that shows all previous positions. **Note the most recent Position End Date.** The employment end date must be on or after this date.
Once you’ve noted the most recent Position End Date, navigate back to your Employment Summary Screen and select “Edit Employment Record.”

From this screen, enter an employment end date that is on or after the most recent Position End date you noted from the “Positions from Other Years” box. Make sure to also enter an End Reason. Click “OK.”

From there, click “Submit” to finalize this action. Your employee will now be ended.
Removing an Employee Online

Finally, we’ll discuss removing a record. Note that you cannot remove any positions from previous years. In that case, you would want to end the employee as shown in the previous pages. Remember, you’ll only remove an employment record if the record was entered by mistake.

To remove the record, log on to IWAS and select EIS from the System Listing. You’ll then be redirected to the EIS Dashboard. Select the “Employment/Position” tab. Search or select the employee you’re removing. For more information on this step, please review Lesson #2: Adding an Employee, Position, and Work Location Online.

You will be redirected to the Employee Summary screen. You’ll need to remove your position first, which will automatically remove all corresponding work locations.

To remove your position, select “Remove” next to the Position record.

A warning screen will pop up asking you to verify that you want to remove the position. Click “OK” to verify.
Your position will now show in pink.

Click “Submit” to save the changes and remove the position record. As always, if you do not click “Submit,” the changes will not be saved.

To remove the employee entirely, select the employee from your Employment list.

Then, underneath “Employment Summary,” select “Edit Employment Record.”
A screen will pop up for you to edit the employment information. In the “End Reason” drop-down box, select “Remove Record.” Enter the End Date, which will be today’s date. Once you have done this, click “OK.”

Click “Submit” to save the changes and remove the employment record. Note again that this will only remove the record if there are no previous year position records.

You will now be redirected back to the Employment/Positions page. Your employee will be removed from the employee list at the bottom of the screen.
Lesson #7: Data Cleanup Using Dashboard and Reports

The Reports function in EIS is an excellent tool to help ensure that the data you’ve entered is clean. EIS provides these reports to empower districts to check their data accuracy as they go.

Utilizing this function, you can generate reports for the data you’ve already entered, then locate and correct any errors listed within the reports. In this lesson, we are going to focus on the two most frequently used reports: EIS Missing Salaries Detail Report and EIS Position Detail (with Salary) Roster Report. Using these two reports and the data quality checklist on the next page, we’ll go through the process of ensuring your data is clean.

To begin, log on to IWAS and select EIS from the System Listing. You’ll then be redirected to the EIS Dashboard. For more information on this step, please review Lesson #1: Getting Acquainted with EIS on page 9.
Now, check the numbers on your dashboard to verify that the aggregate counts are accurate.

Verify that you have:

- Ended all employees that are no longer employed in your district
- Added all employments and positions
- Added all salaries
- Checked for any employees missing a position
- Completed your noncertified list

After you have verified your data with this checklist, check the EIS Missing Salaries Detail Report to ensure that all employee salaries have been added. To do this, navigate to the Reports tab in EIS.
From the Reports screen, select “EIS Missing Salaries Detail Report” under “Salary Reports.”

The “EIS Missing Salaries Detail Report” screen allows you to select specific criteria for the report, or you are able to keep the default selections. For this purpose, leave all the choices selected on their default options and click “View Report” or “Create PDF Report.” Note that if you select “View Report” you may need to disable your pop-up blocker.
If you clicked “View Report,” your report will display. If you clicked “Create PDF Report,” though, you’ll need to open the report PDF from your downloads. Your report should be blank. Any missing salaries will display.

Add each missing salary into EIS, using either the online screens or batch file templates. For more information on this step, please see Lessons #4 and #5, Adding a Salary Online and Adding a Salary using Batch Uploads, on pages 33 and 36, respectively.

Continue to run this report until the report returns zero results.
Once you have added all of your salaries, run the “EIS Position Detail (with Salary) Roster Report” to verify that all your data has been entered. Select “EIS Position Detail (with Salary) Roster Report” under “Salary Reports.”

The “EIS Position Detail (with Salary) Roster Report” screen allows you to select specific criteria for the report, or you are able to keep the default selections. For now, leave all the choices selected on their default and click “View Report” or “Create PDF Report.” Note that if you select “View Report” you may need to disable your pop-up blocker.
If you clicked “View Report,” your report will display. If you clicked “Create PDF Report,” though, you’ll need to open the report PDF from your downloads. Your report should be blank. Any missing information will display.

Add each data element into EIS, using either the online screens or batch file templates.

Continue to run this report until the report returns zero results. Once this report returns zero results, you know that your data is clean in EIS.
Additional Resources

*Click each header to visit the additional resources.*

**EIS Website**

Visit the EIS website for all information relating to EIS.

**Data Elements**

The Data Elements are a compilation of definitions and explanations for all data fields used in EIS. This resource will help you find the specific code you’re looking for when entering data into the system.

**Archived Webinars and Presentations**

Here you can view all webinars within the past year. The webinars provide information regarding changes and enhancements for EIS.

**Validations**

How should the data you enter be formatted? Understand how each data element should be configured in this section.

**File Format Layouts**

This section provides an in-depth explanation of file format layouts for both the text (comma delimited) and XML methods of data uploading.

**Key Dates**

Here, find the dates and deadlines specific to data submission in EIS.
Contact Us

If you require assistance on EIS, please contact the EIS team at (217) 782-3950 or email datahelp@isbe.net.

If you require technical assistance with IWAS, please contact the ISBE Helpdesk at (217) 558-3600.

If you require assistance with viewing the EIS Basics Course videos, please contact Danielle Lewis at (309) 676-1000 ext. 1059, or email dlewis@ilvirtual.org