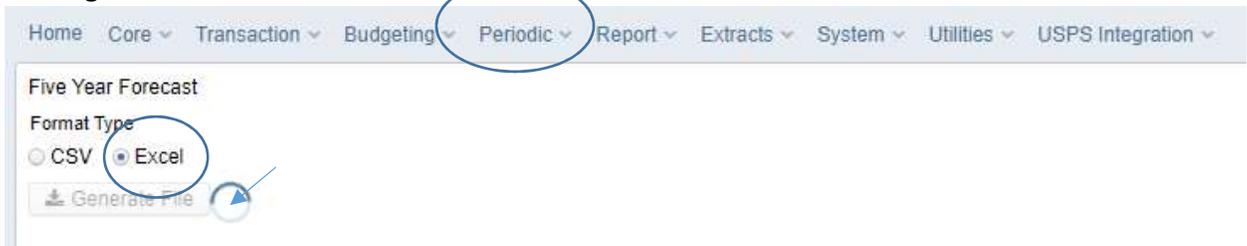


## Directions for financial forecast certify and submit

1. Create the 5-year forecast spreadsheet for the 3 prior years, average change and current year.

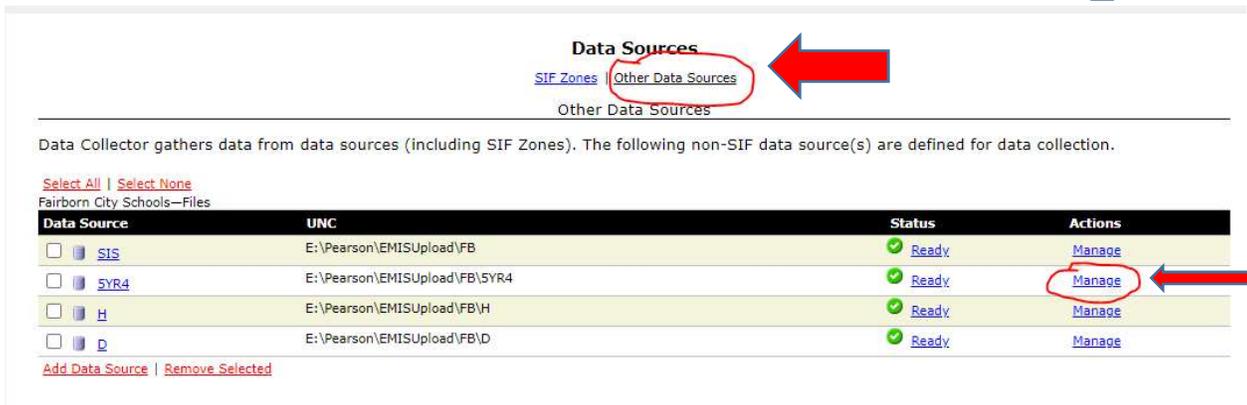
### Redesign:



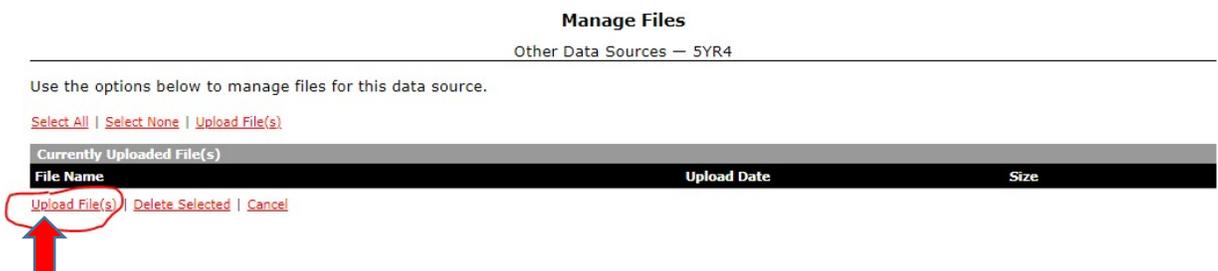
2. Complete the forecast years on the spreadsheet.
3. Save as a csv.
4. Send an email to [helpfiscal@mveca.org](mailto:helpfiscal@mveca.org) to request we convert the CSV file to a .SEQ file or convert the CSV to a .SEQ file using the flat file editor  
Once MVECA has sent the SEQ file to you:
5. Click on the Data Sources Tab in the data collector



6. Click on Other Data Sources
- 7.



8. Then click on manage under 5YR4, see above
9. Click on Upload Files, then browse to find your 5 year forecast CSV file



## File Upload

Other Data Sources — 5YR4

Use the form below to upload files to the data source.

**Upload**

**Data Source Name:** 5YR4

**Target UNC Location:** E:\Pearson\EMISUpload\FB\5YR4

**File To Upload:**  No file chosen

[Upload](#) | [Cancel](#)



10. Click Upload once you have Chosen the CSV file
11. Go to the Collection Requests tab and select the “FY23-P-FYF 1 Req”. This will bring the manifest to the top of the list.

**Collection Requests** | Collection Status | Submissions | Progress | Reports | Archives | Messages | Resources | Preferences

Collection Requests Summary

**Message Center** Click on the triangle to show the list of topics for each message type. Click on the topic link to see the message text. [Export messages to a .csv file](#)

My Messages (0 Unread Messages, 0 total)

Messages for Organizations (0 Unread Messages, 0 total)

▶ **Messages for All Users** (1 Unread Messages, 1 total)

Show messages which are:  Expired  Hidden

**Collection Requests Summary**

Ohio Department of Education

[Refresh](#) | [Restore Defaults](#) | [Hide Message Center](#)

Use the choices below to filter the list of collection requests shown

**Collection Request:**  **Data Set:**  **School Year:**  **Last Activity Within:**

Show closed collections

**Sort Order**

Order Collections By:  Submission Close Date  A-Z  Z-A  A-Z on Short Name  Z-A on Short Name  Most recently active

**Five Year Forecast - Required Spring Update (FY22)**

FY22-P-FYF 2 May: Collection required for all city, exempted village, local, and joint vocational school districts. Five year forecast is a financial ... ⓘ

**Submissions:** April 01, 2022 - May 31, 2022 (25 days till close)

**Version:** 1

**Status:** Data Collection has been prepared today at 08:38:20 AM and is available for preview or certification.

**Submission Number:** 1 (attempt 1)

**Actions:** [Start/Stop Collection](#) [Prepare](#) [Certify & Submit](#) [Cancel](#) [Add New Scheduled Collection](#)

**Prepare Outputs:** [Preview Prepared Data](#)

1. Then click Start/stop Collection
2. Check the 5YR4 Data Source and then click “Start Data Collection for all items checked below”.

Collection Requests | Collection Status | Submissions | Progress | Reports | Archives | Preferences

Collection Requests Summary > Start Collection

### Five Year Forecast - Initial Required (FY18)

Start Collection — Submission Number 1 (attempt 0)

To start data collection, choose the data sources from which to collect data. You may exclude some of the data sources now and resume data collection later, by clicking the Start/Stop Collection action on the Collection Requests Summary page.

[Start Data Collection for all items checked below](#)

EMIS Formatted Files		
Data Sources	Availability	Collection Status
<input type="checkbox"/> SIS	✓ <a href="#">Ready</a>	Not Started
<input checked="" type="checkbox"/> 5YR4	✓ <a href="#">Ready</a>	Not Started
<input type="checkbox"/> H	✓ <a href="#">Ready</a>	Not Started

Scope of execution

Perform:  Collect Only  Collect and Prepare



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3. Click refresh to see additional options

Collection Requests | Collection Status | Submissions | Progress

Collection Requests Summary

Collection

Ohio

[Refresh](#) | [Restore Defaults](#)

Use the choices below to filter the list of collection requests shown

Collection Request:   Show closed collections

Sort Order

Order Collections By:  Submission Close Date  A-Z  Z-A  A-

**Five Year Forecast - Initial Required (FY18)**  
 FY18-P-FYF 1 Req: Collection required for all city, exempted village,

**Submissions:** October 02, 2017 - October 31, 2017

**Version:** 1

**Status:** Data Collection starting.

**Submission Number:** 1 (attempt 0)

**Actions:** Waiting for data collection to start

[Set Default Collection properties](#)



4. Click Prepare and then OK when prepare completes.

**Collection Requests**

Collection Requests Summary

Ohio Department of Education

[Refresh](#) | [Restore Defaults](#)

Use the choices below to filter the list of collection requests shown

Collection Request:  Data Set:

Show closed collections

Sort Order

Order Collections By:  Submission Close Date  A-Z  Z-A  A-Z on Short Name  Z-A on Short Name

**Five Year Forecast - Initial Required (FY18)**

FY18-P-FYF 1 Req: Collection required for all city, exempted village, local, and joint vocatio

**Submissions:** October 02, 2017 - October 31, 2017  
**Version:** 1  
**Status:** Data Collection completed successfully today at 11:19:16 AM.  
**Submission Number:** 1 (attempt 0)  
**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)  
[Set Default Collection properties](#)

[Refresh](#) | [Restore Defaults](#)

5. Click Preview Prepared Data

**Collection Requests**

Collection Requests Summary

Ohio Department of Education

[Refresh](#) | [Restore Defaults](#)

Use the choices below to filter the list of collection requests shown

Collection Request:  Data Set:  School Year:  Last Activity Within:

Show closed collections

Sort Order

Order Collections By:  Submission Close Date  A-Z  Z-A  A-Z on Short Name  Z-A on Short Name  Most recently active

**Five Year Forecast - Initial Required (FY18)**

FY18-P-FYF 1 Req: Collection required for all city, exempted village, local, and joint vocational school districts. Five year forecast is a financial ...

**Submissions:** October 02, 2017 - October 31, 2017  
**Version:** 1  
**Status:** Data Collection has been prepared today at 11:24:01 AM and is available for preview or certification.  
**Submission Number:** 1 (attempt 1)  
**Actions:** [Start/Stop Collection](#)  
[Prepare](#)  
[Certify & Submit](#)  
[Cancel](#)  
[Add New Scheduled Collection](#)  
[Set Default Collection properties](#)

**Prepare Outputs:** [Preview Prepared Data](#)

[Refresh](#) | [Restore Defaults](#)

6. Click Generate Preview –

The screenshot shows the 'Five Year Forecast - Initial Required (FY18)' page. The navigation bar includes 'Collection Requests', 'Collection Status', 'Submissions', 'Progress', 'Reports', 'Archives', and 'Preferences'. The page title is 'Five Year Forecast - Initial Required (FY18)' and the submission is 'Submission Number 1 (attempt 1), LEA: Chillicothe City Schools'. Below the title, there is a section for 'Preview Types' with 'Detail' checked. Under 'Output Options', 'File Format' is set to 'CSV' and 'Include in CSV files' is set to 'Data only'. The 'Generate Preview' button is circled in red.

7. It will display a record count. Click on the csv file to open it. Confirm that we loaded the correct forecast.

The screenshot shows the 'Five Year Forecast - Initial Required (FY18)' page after the preview has been generated. The 'Generate Preview' button is now a link. Below it is a table showing the record count for 'Submission 1' and 'Sub 0'. The table has columns for 'File', 'Valid', 'Invalid', 'Total', and 'Valid'. The 'Forecast\_Record.csv' file is circled in red. A red arrow points from the 'Generate Preview' button to the table, and another red arrow points from the table to the 'Certify & Submit...' button on the right side of the page. The right side of the page also contains a 'Need to make changes?' section and a 'Certification / Submission' section.

File	Valid	Invalid	Total	Valid
Forecast_Record.csv	67	0	67	0
<b>Total counts:</b>	<b>67</b>	<b>0</b>	<b>67</b>	<b>0</b>

8. There is a Certify & Submit option on this page or you can click the Collection Request tab and certify and submit from the first page.

9. Add your pdf assumptions at this time. Browse to where they are saved and click Upload File. Do not email your assumptions to ODE.

**Collection Requests** | Collection Status | Submissions | Progress | Reports | Archives | Preferences

Collection Requests Summary > Preview > Certify & Submit

### Five Year Forecast - Initial Required (FY18)

Submission Number 1 (attempt 1) - Certification

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:** O:\FISCAL\5yr4castfy18 5yr4\ch\Chillicothe-043745.pdf **Browse...** **Required File Status:** None (not uploaded)

[Upload File](#)

**Statement of Certification**

By certifying this collection, you are stating that you have previewed the data and approve its contents. The collection will be submitted to the report authority and will include your name and contact information.

I certify this collection

Certified By: Dinnen

**Comments (FOR YOUR USE ONLY, maximum 255 characters)**

[Certify & Submit](#) | [Cancel](#)

10. The Required File Status will change to show that the file was uploaded successfully and will be included in the submission. Check the "I certify this collection" box and then Certify and Submit.

**Collection Requests** | Collection Status | Submissions | Progress | Reports | Archives | Preferences

Collection Requests Summary > Preview > Certify & Submit

### Five Year Forecast - Initial Required (FY18)

Submission Number 1 (attempt 1) - Certification

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:** [Remove File](#) **Browse...** **Required File Status:** File Uploaded  
File: 'Chillicothe-043745.pdf' will be included with the submission.

**Statement of Certification**

By certifying this collection, you are stating that you have previewed the data and approve its contents. The collection will be submitted to the report authority and will include your name and contact information.

I certify this collection

Certified By: Dinnen

**Comments (FOR YOUR USE ONLY, maximum 255 characters)**

[Certify & Submit](#) | [Cancel](#)

Process complete!!

Forecast will be available in a few days at <https://education.ohio.gov/Topics/Finance-and-Funding/Five-Year-Forecasts/Five-Year-Forecast-Traditional-Districts-and-JVSDs>.