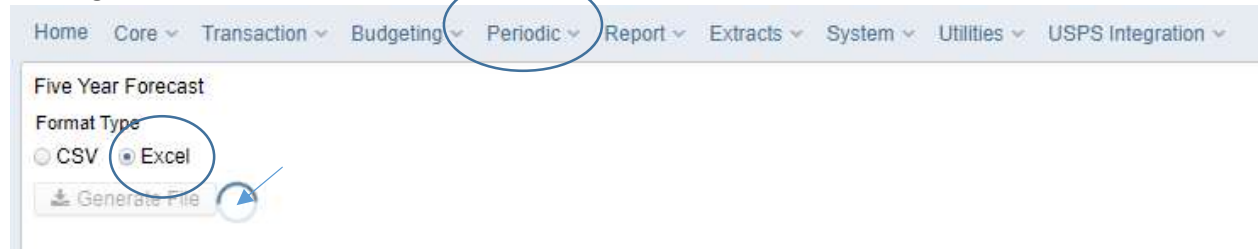


Directions for financial forecast certify and submit

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

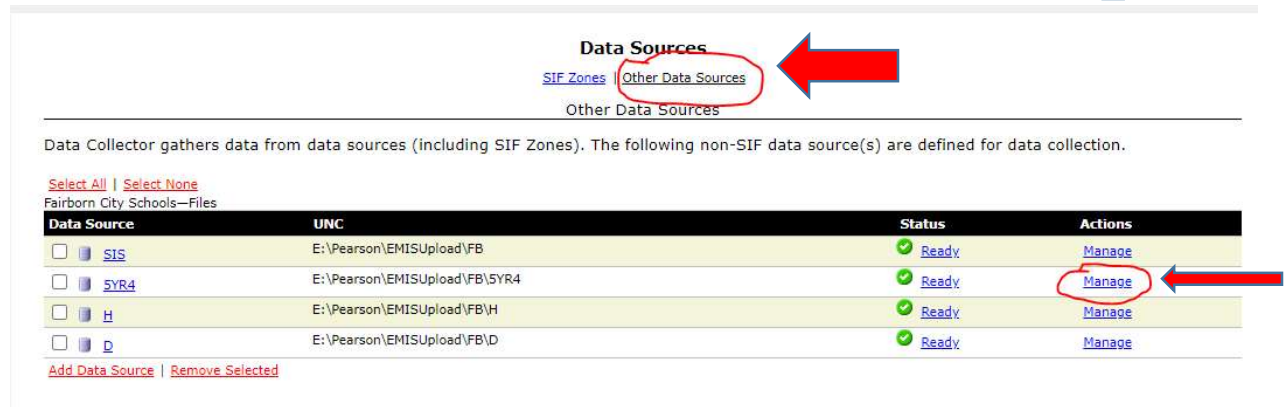
Redesign:



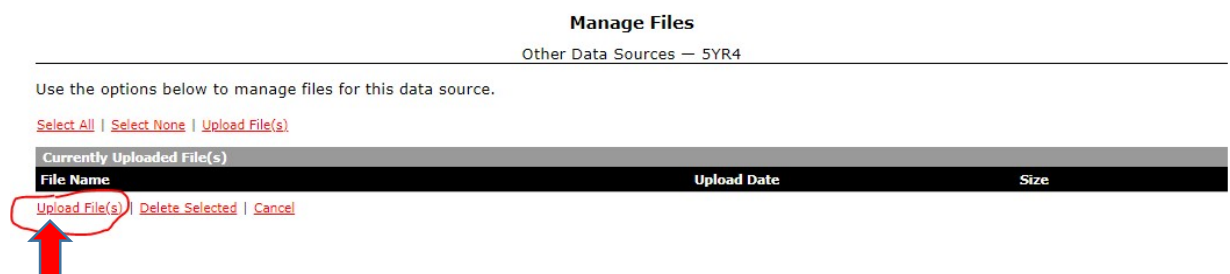
2. Complete the forecast years on the spreadsheet/template both on the data and forecast tabs
 - Ensure you do not have average change percentages more than 999%, if so manually change the average change percentage to 999.0% as the data collector does not accept percentage values higher than this
3. Save an XLSX version of your forecast in case modification are needed later as saving in CSV format can lose formatting.
4. **Save as a csv, ensure you are on the output tab of the Excel file when saving.**
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: Choose File No file chosen

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



- Click Upload once you have chosen the CSV file
- Go to the Collection Requests tab and select the “FY25-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: FY22-P-FYF 2 May **Data Set:** All **School Year:** All **Last Activity Within:** All

☐ 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](#)

12. Then click Start/stop Collection

- 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

Second

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
☐ SIS	✓ Ready	Not Started
☒ 5YR4	✓ Ready	Not Started
☐ H	✓ Ready	Not Started

Scope of execution

Perform: ☒ Collect Only ☐ Collect and Prepare

14. 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: FY18-P-FYF 1 Req

☐ Show closed collections

Sort Order

Order Collections By:

☐ Submission Close Date
 ☒ A-Z
 ☐ Z-A
 ☐ A-Z

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](#)

15. Click Prepare and then OK when prepare completes.

Collection Requests

Collection Status

Submissions

Progress

Reports

Collection Requests Summary

Ohio Department of Education

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

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

Collection Request:

FY18-P-FYF 1 Req

All

☐ 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 vocational school districts. Five year forecast is a financial ...

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](#)

16. Click Preview Prepared Data

Collection Requests

Collection Status

Submissions

Progress

Reports

Archives

Preferences

Collection Requests Summary

Ohio Department of Education

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

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

Collection Request:

FY18-P-FYF 1 Req

All

All

All

☐ 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](#)

17. Click Generate Preview –

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

Collection Requests Summary > Preview

Five Year Forecast - Initial Required (FY18)
Submission Number 1 (attempt 1), LEA: Chillicothe City Schools

Select the options and click on the Generate Preview link to create the preview.

Last Prepared: Today at 11:24:01 AM

Preview Types

☒ Detail

Output Options

Zip File: ☐ Download file as a compressed .zip (for faster downloads)

File Format: ☐ HTML ☒ CSV

Include in CSV files: ☒ Data only
☐ Data and Fatal exceptions
☐ Data and All exceptions

[Generate Preview](#)

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

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

Collection Requests Summary > Preview

Five Year Forecast - Initial Required (FY18)
Submission Number 1 (attempt 1), LEA: Chillicothe City Schools

Select the options and click on the Generate Preview link to create the preview.

Last Prepared: Today at 11:24:01 AM

Preview Types

☒ Detail

Output Options

Zip File: ☐ Download file as a compressed .zip (for faster downloads)

File Format: ☐ HTML ☒ CSV

Include in CSV files: ☒ Data only
☐ Data and Fatal exceptions
☐ Data and All exceptions

[Generate Preview](#)

Need to make changes?

If you are not satisfied with this data, click on the Collection Requests tab and cancel the collection (or use the Start/Stop Collection link below) to re-collect from the data source (s). You can then Prepare and Preview the collection again.

[Start/Stop Collection...](#)

Certification / Submission

Once you have previewed the collection and are satisfied with its contents, click the link below to certify it and submit it to Ohio Department of Education.

[Certify & Submit...](#)

File	Valid	Invalid	Total	Sub 0
Forecast_Record.csv	67	0	67	0
Total counts:	67	0	67	

19. 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.

20. 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\5yr4cast\fy18 5yr4\chl\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

☐ I certify this collection

Certified By: Dinnen

Comments (FOR YOUR USE ONLY, maximum 255 characters)

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

21. 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: **Browse...** **Required File Status:** File Uploaded

File: 'Chillicothe-043745.pdf' will be included with the submission

[Remove 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](#)

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>.