




# PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

12/19/2019

Section B: Payroll Update Processing

***[Topic 3: Update/Display Personnel  
Information, V2.22]***

## Revision History

Date	Version	Description	Author
12/19/2019	2.22	19.04.00 – Add 2020 W-4 fields.	D. Ochala
04/03/2017	2.21	17.01.00 – Add the <b>GHI BOE Transfer</b> field.	D. Ochala
11/04/2016	2.20	16.03.00 – Change <i>GHI Coverage Effective Date</i> to <i>GHI First Deduction Date</i> field.	D. Ochala
06/17/2016	2.19	16.02.00 – Add <b>GHI Coverage End Date</b> field.	D. Ochala
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03/27/2013	2.12	13.01.00 – Add <i>Leave Reason Max</i> , <i>Cell Phone Number</i> , <i>Background-check Date</i> . Update screenshots.	D. Ochala
07/13/2012	2.11	12.02.00 – Add <i>New PSERS</i> and <i>GHI % Distribution</i> . Update screenshots.	D. Ochala
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05/24/2011	2.9	11.02.00 – Add EEO-5 Job Code. Change ‘GHI Eligible Date’ to ‘GHI 1 <sup>st</sup> Day Worked’. Update screenshots.	D. Ochala
01/24/2011	2.8	10.04.01 – Remove AEIC switch from screen. Update screenshots.	D. Ochala
06/30/2010	2.7	10.02.00 – Update State Marital Status Indicator.	D. Ochala
06/17/2009	2.6	09.02.00 – Added employee’s spouse SSN for <i>SHBP</i> Medicare-secondary payer reporting requirements, and FICA switch warning message.	C. W. Jones
03/31/2009	2.5	09.01.00 – Added Data Collection ethnicity code information and instructions, and CPI-3 <sup>rd</sup> party contractor information reference.	C. W. Jones
12/16/2008	2.4	08.04.00 - Added <i>TRS-Pension Switch ‘R’</i> and <i>DOE Paid ERCON</i> field edit information and instructions.	C. W. Jones
09/26/2008	2.3	08.03.00 – Added <i>Long Term Substitute</i> information and instructions.	C. W. Jones
05/29/2008	2.2	08.02.00 – Added updated <i>Select Employee</i> screen information and instructions.	C. W. Jones
12/19/2007	2.1	07.04.00 – Added new screenshots, procedures unchanged.	C. W. Jones
09/25/2007	2.0	07.03.00 – Added <i>Overview</i> updates to inactive employee information, and GHI option, tier, and deduction code drop-down selection icon  information and instructions.	C. W. Jones

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## Overview

In some instances, PCGenesis disallows payroll updates, such as when payroll is in progress, and when year-to-date updates are complete. Attempts to update employee information during these times generates the “Updates not allowed at this time.” message. In this instance, select *F16* to acknowledge the message and to exit the update procedure.

PCGenesis employee-specific personnel information includes personal and job class information. With the exception of the employee number, PCGenesis allows modifications to the remaining fields on the *Update/Display Personnel Data* screen.

**Third Party Contract Employee Information:** PCGenesis does not permit access to third-party contractor employees from the PCGenesis payroll module. PCGenesis users must access third-party contractor employees via the *Certified/Classified Personnel Information (CPI)* module. If the employee payroll class code is changed to a third-party contractor class (**Class Type** = 3) on the *Personnel Data Screen*, PCGenesis displays the error message, “3<sup>rd</sup> party contractor class not allowed”.

**Updates to Inactive Employee Information:** PCGenesis displays the warning, “Employee is NOT active! Changes on this screen will not impact payroll.” when the user attempts to update inactive employees’ information. In this instance, select *OK* to save the changes anyway, or *Cancel* to redisplay the screen in response to the prompt.

**Employee Biographical Information:** As an employee’s certification status changes from classified to certified on the *Display/Update Personnel Data* screen, PCGenesis automatically updates the employee’s CPI biographical salary information to reflect the change.

**Teacher Retirement System (TRS)-Mandated Field Entries:** The *Pens Elig Date (Retirement Eligibility Date)* field entry identifies the date on which the employee becomes eligible to participate in the assigned retirement plan. The *TRS DOE Paid ERCON (Teacher Retirement System-Georgia Department of Education Paid Employer Contribution)* field identifies the Georgia Department of Education (GaDOE) as the contributor for the employer-paid portion of the employee’s TRS retirement plan.

**State Health Benefit Plan (SHBP)/Georgia Health Insurance (GHI) Requirements:** SHBP/GHI eligibility information must be tracked for all employees. The employee’s county of residence, coverage dates, and coverage options are required entries for GHI participants. SHBP/GHI eligibility tracking allows school districts and systems to prepare for the yearly *Open Enrollment* health insurance period. The entries in the *GHI Eligible?*, *Participate in GHI?* and the *GHI Option* and *GHI Tier* fields must correspond. For example, if *N (No)* is entered in the *Participate in GHI?* field, *NC (No Coverage)* or *NE (Not Eligible)* must be entered in the *GHI Option* field, and *00 (No Coverage)* must be entered in the *GHI Tier* field. PCGenesis processes this information when creating the *GHI Monthly Deduction File (PUF)*. Refer to *Payroll System Operations Guide, Section D: Processing Monthly/Quarterly/Annual/Fiscal Report Processing, Topic 1: Processing Monthly Reports* for additional SHBP/GHI requirements.

**GHI Change Code and Date Fields:** The **GHI change code** field tracks employee updates which impact GHI processing. Upon entering the *Update/Display Personnel Data* screen for an employee, the **GHI change code** defaults to the last change code submitted for the employee. PCGenesis creates a GHI change record for the employee in two situations:

- When the user specifically changes the **GHI Change Code** from its previous value.
- PCGenesis automatically creates a *MISC* GHI change record when changes are detected in specific fields which are defined below.

Certain fields on the *Update/Display Personnel Data* screen must be populated when processing specific types of transactions in order for the GHI change record to be created correctly.

When terminating an employee, the following entries are required:

- **GHI Change Code:** *DCSD, KLOD, LOFF, RETR, or TERM*, as appropriate
- The **Termination Date** and **Termination Reason Code** fields are required
- The **GHI Final Deduction Date** is required
- The **GHI Coverage End Date** is optional, and is typically used for an employee transferring to another school district

For a deceased employee, the following entries are required:

- **GHI Change Code:** *DCSD or KLOD*, as appropriate
- The **Termination Date** and **Termination Reason Code** fields are required
- The **GHI Final Deduction Date** is required
- The **GHI Coverage End Date** is optional, and is typically used for an employee transferring to another school district
- The **Date of Death** is required

PCGenesis automatically creates a *MISC (Name, Address, Phone, etc.)* GHI change record when changes are detected in any of the following fields:

- Employee first, middle, or last name fields
- Employee street, county, city, state or zip fields
- Employee telephone number
- Employee e-mail address
- Hours per week

PCGenesis exports this information when users create the *GHI Recent Changes to Employee (AUF)* file. Refer to the *Payroll System Operations Guide, Section D: Processing Monthly/Quarterly/Annual/Fiscal Report Processing, Topic 1: Processing Monthly Reports* for the instructions on performing this procedure.


**Terminating Employees:** When terminating employees, PCGenesis automatically sets the *GHI Eligible?* and *Participate in GHI ?* flags to *N (No)* for certified employees. For classified employees, the *Participate in GHI?* flag will also be set to *N (No)*. The SHBP/GHI option and tier will be set to *'NE'* (*Not Eligible*) and *'00'* (*No Coverage*) respectively. Also, the *GHI 1<sup>st</sup> Day Worked* field and the *GHI 1<sup>st</sup> Deduction Date* field will both be cleared.




**Inactivating Employee Information:** Although inactivating an employee's information excludes the employee from payroll, PCGenesis neither clears the employee's gross data, nor the employee's deduction information.

**Certified Substitute Information:** After entering the certificate type code information within the *Certified/Classified Personnel Information (CPI)* module, PCGenesis displays substitute employees' certificate information on the *Update/Display Personnel Data* screen.

**Long Term Substitute Information:** Substitute employees, payroll class type 'S', who are employed by the school district for six (6) weeks or more to fill in for a vacant permanent position, or to temporarily replace a regular contractual employee who is currently on leave, are considered "*Long Term Substitutes*". These employees should have the *Include on CPI?* field set to 'Y' (Yes) and should have a valid entry in the *CSI Job* (from CPI) field. Setting *Include on CPI?* to 'Y' will cause these long term substitute employees to be included within the *Certified/Classified Personnel Information (CPI)* module.

**Ethnicity Code Change Information:** To meet Federal and CPI reporting requirements for calendar year 2010, the *Display/Update Personnel Data* screen displays race/ethnicity definitions. CPI processing now requires a two-question format to collect data on ethnicity and race and requires two distinct responses. The first question concerns the broad category of ethnicity, and the second question is concerned with the less broad designation of an employee's specific race category. The first part asks the respondent to identify his or her ethnicity as a Hispanic or Latino. The second part asks the respondent to identify his or her race or races. The user must select at least one race code.

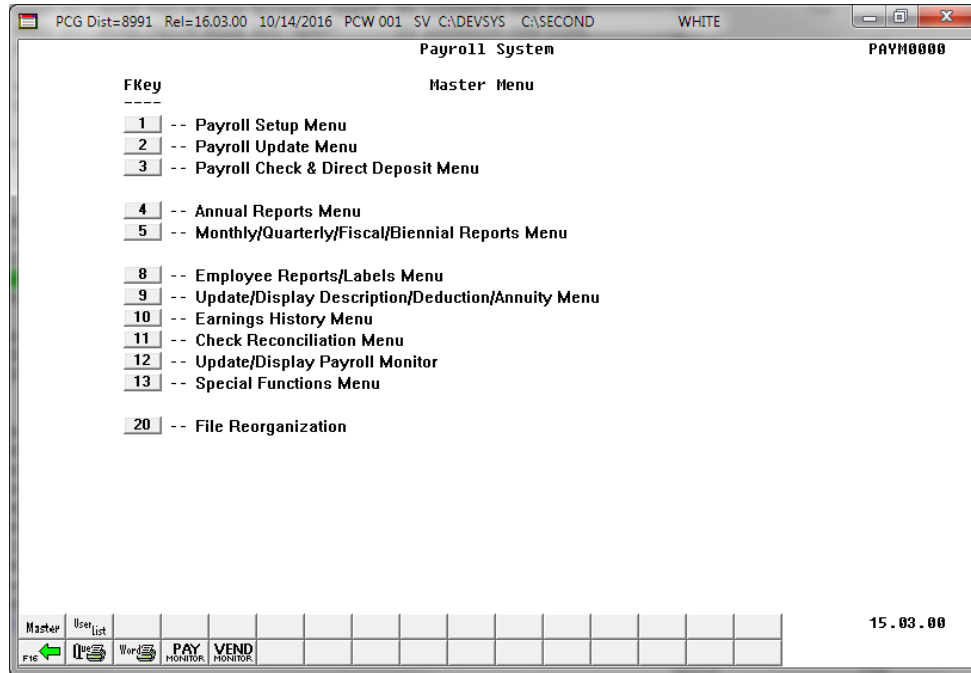
**Screen Print:** The screen print feature allows the user to obtain a screen print of the *Update/Display Personnel Information* screen. The screen print feature is available on display/inquiry screens which have the  button. The screen print file will be available in the print queue with the name 'PSCNnnnn'.

Selecting the drop-down selection icon ,  (F15 – Code Lookup) or  (F28 – Help Screens) when offered provides additional assistance with the entry of information.

## *Procedure A: Setting/Clearing Employee Search Criteria*

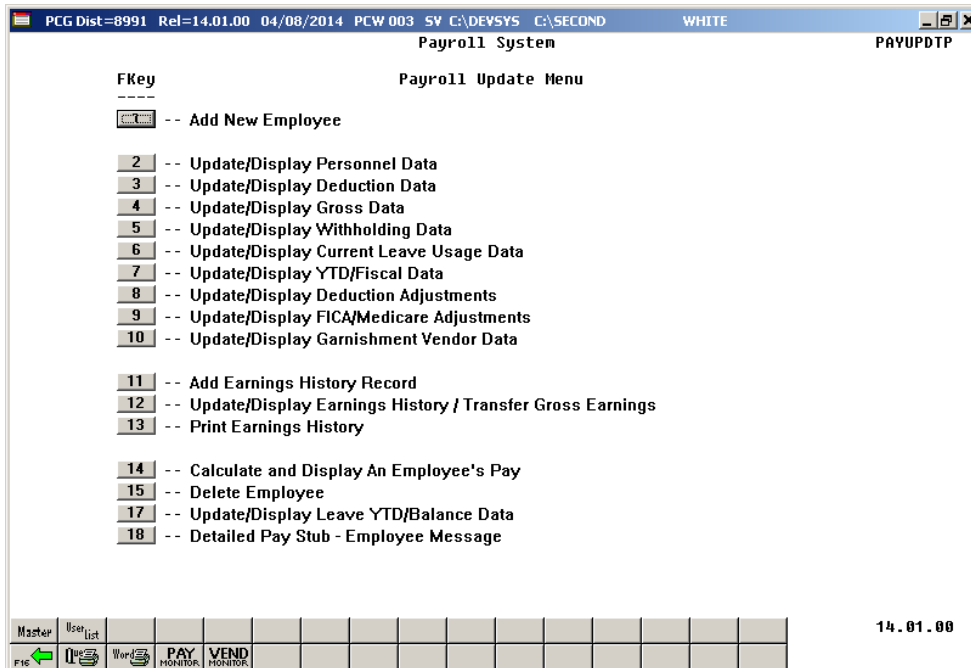
Refer to the *Payroll System Operations Guide*, Section B: Payroll Update Processing, Topic 1: Set/Clear Employee Search Criteria for instructions.

## Procedure B: Updating/Displaying Employee Personnel Information



Step	Action
1	Select <b>2</b> (F2 - Payroll Update Menu).

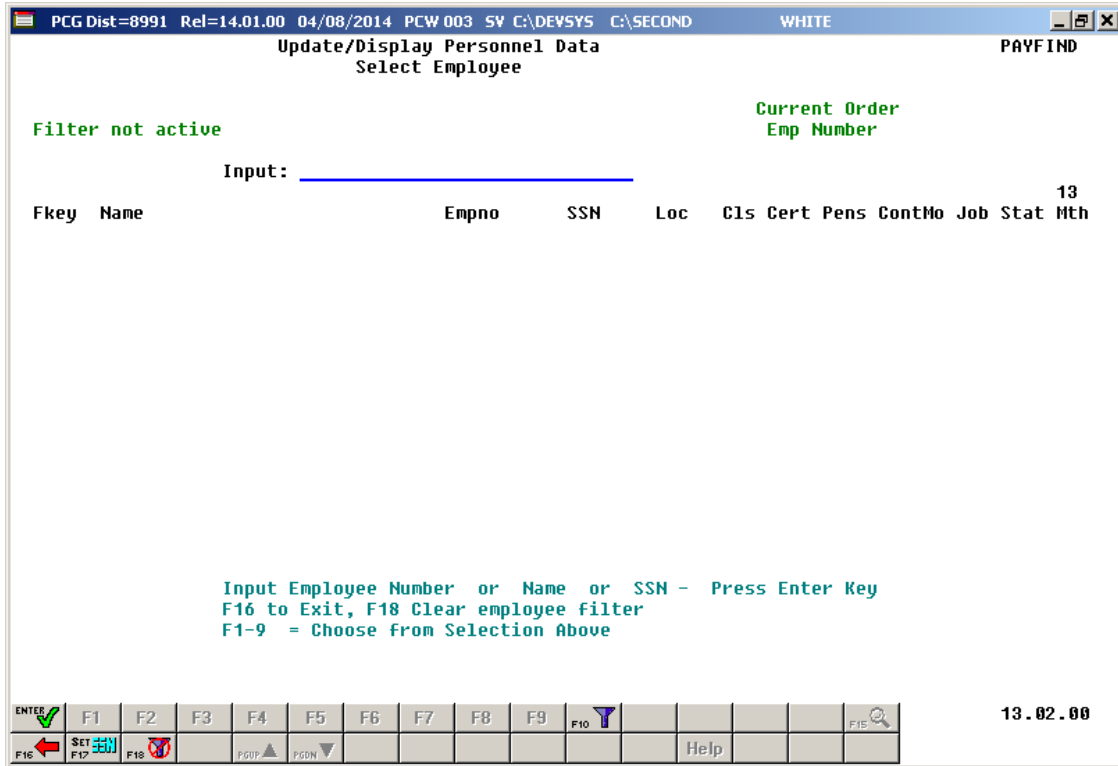
The following screen displays:






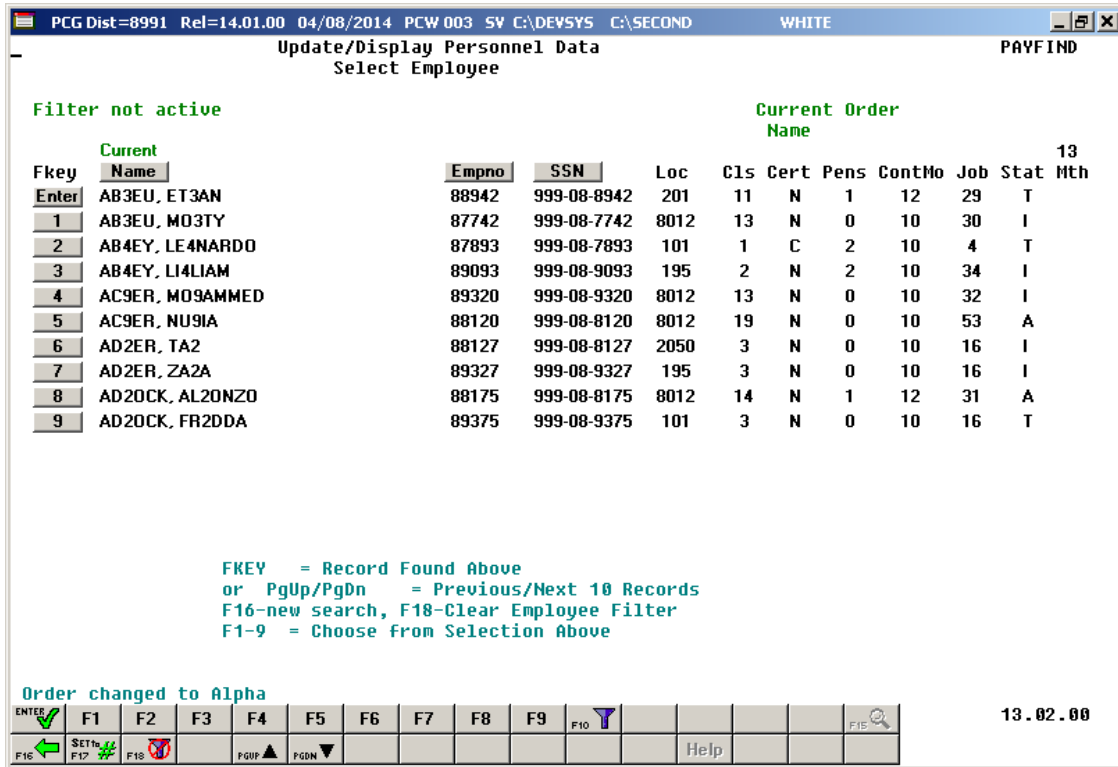
Step	Action
2	Select  (F2 - Update/Display Personnel Data).




The following screen displays:



Step	Action
3	<p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 5</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and select Enter. Entering a complete or partial name in the Name field displays the results most closely matching the search criteria entered. Proceed to Step 4.</i></p>

The following screen displays:



Step	Action
4	<p>Select <b>Enter</b> (Enter) or select the <b>Function key</b> corresponding to the employee's record, and select  (Enter).</p> <p>To sort by Name: Select <b>Name</b> (Name).</p> <p>To sort by Employee Number: Select <b>Empno</b> (Empno).</p> <p>To sort by Social Security Number: Select <b>SSN</b> (SSN).</p> <p>To scroll between pages: Select the PgUp/PgDn keys on the computer's keyboard or select either  (Page Up) or  (Page Down).</p>

For classroom teachers, the following screen displays:

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE - [ ] X

**Update/Display Personnel Data** PAY02

Status **A -- Active** **ALBARO, ANBERA**

Emp. no. **88423** Pay Loc **201** Location **000201** Class **1** **CLASSROOM TEACHERS**

Sex Code **F** Work Loc **201** Location **000201** Job **3** **TEACHER 4-8**

Mar Stat **S** SSN **999 08 8423** EEO-5 Job **A06** **Second Teacher**

Ethnic **2** **WHITE**

NAME First **ANBERA** Middle  
Last **ALBARO** Suffix Prefix

EEO-5 and CPI Ethnic/Race:  
Hispanic/Latino Ethnicity?  
 Yes  No

Race (Select all that apply)  
 Yes  No **Am Indian Alaskan**  
 Yes  No **Black**  
 Yes  No **White**  
 Yes  No **Asian**  
 Yes  No **Hawaiian Pacific**

Address **2601 MAIN STREET** Certificate Type **T5**

Address L2 CS1 Job (From CPI) **106**

City/State **SMITH**, GA Include on CPI ? **Y**

Zip Code **33333** County **160** Sick Bank ? **N**

Phone **(999)555-1628** Out of State Substitute rank

Cell phone ( )**000-0000** Override accrue?

Adj Lv Elig Date  
Lv Reason Max  
Hours Per Day **8.000**

Spouse SSN  
Birth Date **4/01/1969** Pension sw **Y**

Hire Date **8/02/2018** Hrs/Week **40.00** Pens Elig Date **8/02/2018**

Rehire Date GHI Eligible ? **Y** TRS DOE Paid ERCON ? **N**

Background Ck GHI 1ST Day Wrk **8/02/2018** Health ins flag **Y**

Date of Death GHI Cover Start **10/01/2018** Participate in GHI ? **Y**

Elig for Rehire **Y** GHI Final Ded Dt GHI BOE Transfer in? **Y**

Term Date GHI Coverage End GHI Option **K1** **KAISER HMO**

Term Reason GHI Change Code **NEMP** GHI Tier **96** **FAMILY**

GHI Ded Cd **9**

ENTER **19.03.01**

Step	Action
<b>5</b>	Select  (F9 – Switch to Update Mode).

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE

**Update/Display Personnel Data** PAY02

Status **A** -- Active AL8ARO, AN8ERA

Emp. no. 88423 Pay Loc 201 Location 000201 Class 1 CLASSROOM TEACHERS

Sex Code E Work Loc 201 Location 000201 Job 3 TEACHER 4-8

Mar Stat S SSN 999 08 8423 EEO-5 Job A06 Second Teacher

Ethnic 2 WHITE

NAME First AN8ERA Middle \_\_\_\_\_

Last AL8ARO Suffix \_\_\_\_\_ Prefix \_\_\_\_\_

EEO-5 and CPI Ethnic/Race:  
Hispanic/Latino Ethnicity?  
 Yes  No

Race (Select all that apply)  
 Yes  No Am Indian Alaskan

Yes  No Black

Yes  No White

Yes  No Asian

Yes  No Hawaiian Pacific

Address 2601 MAIN STREET Certificate Type T5

Address L2 \_\_\_\_\_ CS1 Job (from CPI) 106

City/State SMITH, GA Include on CPI ? Y

Zip Code 33333 County 160 Sick Bank ? N

Phone (999)555-1628 Out of State Substitute rank \_\_\_\_\_

Cell phone ( )000-0000 Override accrue? \_\_\_\_\_

Adj Lv Elig Date \_\_\_\_\_

Lv Reason Max \_\_\_\_\_

Hours Per Day 8.000

Spouse SSN \_\_\_\_\_

Birth Date 4/01/1969 Pension sw Y

Hire Date 8/02/2018 Hrs/Week 40.00 Pens Elig Date 8/02/2018

Rehire Date \_\_\_\_\_ GHI Eligible ? Y TRS DOE Paid ERCON ? N

Background Ck \_\_\_\_\_ GHI 1ST Day Wrk 8/02/2018 Health ins flag Y

Date of Death \_\_\_\_\_ GHI Cover Start 10/01/2018 Participate in GHI ? Y

Elig for Rehire Y GHI Final Ded Dt \_\_\_\_\_ GHI BOE Transfer in? Y

Term Date \_\_\_\_\_ GHI Coverage End \_\_\_\_\_ GHI Option K1 KAISER HMO

Term Reason \_\_\_\_\_ GHI Change Code NEMP GHI Tier 96 FAMILY

GHI Ded Cd 9






Mode changed to update


19.03.01

ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15


F16 F17 F18 Per Ded Grs W/H Lv Ytd Help Adj FICA Gar

Step	Action
6	<p>Verify “Mode changed to update” displays.</p> <p><i>Although these instructions refer primarily to the entry of information, if the fields already contain information, or are automatically populated with information during the selection a PF key, verify the fields’ entries are correct for the employee. If the information is incorrect, make the appropriate modifications to the field entries.</i></p>
7	<p>Enter the employee’s status in the <b>Status</b> field.</p> <p><i>Valid codes are A (Active), I (Inactive) and T (Terminated).</i></p> <p><u>To “inactivate” an employee:</u> Enter <b>I</b> (Inactive) in the field, and enter the termination date (MM/DD/CCYY) and termination code in <i>Step 31</i>.</p> <p><u>To reactivate an employee:</u> Enter <b>A</b> (Active) in the field and the rehire date (MM/DD/CCYY) in the <b>Rehire Date</b> field at <i>Step 27</i>.</p>

Step	Action
8	<p>Enter the code or select the drop-down selection icon  in the <b>Pay Loc</b> (Pay Location), <b>Class</b>, <b>Work Loc</b> (Work Location), and <b>Job</b> fields to choose the correct values. Enter the correct values in the <b>Sex Code</b>, <b>Mar Stat</b> (Marital Status), and <b>SSN</b> (Social Security Number) fields.</p> <p><i>If the information is incorrect, make the appropriate modifications. Valid gender codes include F (Female) and M (Male). Valid Marital Status codes include M (Married), and S (Single). If the SSN is unknown, enter all 9's temporarily. Before calendar year end W-2 processing or TRS, PSERS or GHI reporting however enter a valid SSN in the field.</i></p>
9	<p>Enter the code or select the drop-down selection icon  in the <b>EEO-5 Job</b> field to choose the employee's EEO-5 job code.</p> <p><i>The EEO-5 job code is necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>
10	<p>Enter the code or select the drop-down selection icon  in the <b>Ethnic</b> field to choose the employee's ethnicity.</p> <p><i>The <b>Ethnic</b> code is no longer used in the PCGenesis system.</i></p>
11	<p><b>EEO-5 and CPI Ethnic/Race:</b></p> <p>Select the  (<b>Radio Button</b>) to left of the appropriate response in the <b>Hispanic/Latino Ethnicity?</b> field.</p> <p><i>The <b>Hispanic/Latino Ethnicity</b> field is necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>
12	<p><b>EEO-5 and CPI Ethnic/Race:</b></p> <p>Select the  (<b>Radio Button</b>) to left of all of the responses which apply in the <b>Race (Select all that apply)</b> fields.</p> <p>Valid options include:</p> <ul style="list-style-type: none"> <li>American Indian Alaskan</li> <li>Black</li> <li>White</li> <li>Asian</li> <li>Hawaiian Pacific</li> </ul> <p><i>Select at least one response.</i></p> <p><i>The <b>Race</b> fields are necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>


Step	Action
13	<p>Enter the name and complete mailing address in the <b>Name</b>, <b>Address</b>, <b>Address L2</b>, <b>City/State</b>, and <b>Zip Code</b> fields.</p> <p><i>Enter Zip+4 codes in the Zip Code field where appropriate. Enter up to thirty-two (32) characters within each of the remaining fields.</i></p>
14	<p><b>SHBP/GHI (Required):</b> Enter the county of residence code in the <b>County</b> field.</p> <p><i>PCGenesis defaults to the school district's county. Refer to the Georgia County Code Listing for a complete listing of Georgia counties.</i></p>
15	<p>Enter the employee's telephone number, including the area code in the <b>Phone</b> field.</p>
16	<p>Enter the employee's cell phone number, including the area code in the <b>Cell phone</b> field.</p>
17	<p><b>Certified employees:</b> Verify the employee's certificate type has defaulted correctly in the <b>Certificate Type</b> field from the employee's <i>Certificate</i> record.</p> <p><i>A complete listing of certificate types is located at <a href="http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes03.entry_form">http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes03.entry_form</a>. If the information is incorrect, select F16 to exit this procedure. Refer to the <i>CPI System Operations Guide</i>, Section A: <i>Displaying/Updating Individual Employee Information</i> for the instructions on correcting the employee's certificate type. Repeat this procedure beginning at Step 1 in this instance.</i></p>
18	<p>Enter the employee's job code in the <b>CS1 Job (from CPI)</b> field.</p> <p><i>The GaDOE provides a complete listing of CPI Job Codes at: <a href="http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx">http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx</a></i></p>
19	<p>Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>Include on CPI?</b> field.</p> <p><i>For Long Term Substitutes, enter Y (Yes) in the field.</i></p>
20	<p>Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>Sick Bank?</b> field. A response of <b>Y</b> (Yes) indicates that the employee participates in the sick bank and a response of <b>N</b> (No) indicates that the employee does NOT participate in the sick bank.</p>
21	<p><b>Required field for substitutes:</b> Enter the code or select the drop-down selection icon  in the <b>Substitute Rank</b> field to choose the substitute's rank. The <b>Substitute Rank</b> will determine the rate of pay for the substitute in the <i>Enhanced Substitute and Employee Leave System</i>.</p> <p><i>The Substitute Rank code is necessary when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i></p>

Step	Action
22	<p><b>Override Accrue?:</b> Optional</p> <p>The <b>Override Accrue?</b> field indicates whether or not this employee should accrue leave in the <i>Enhanced Substitute Pay and Employee Leave System</i>.</p> <p>Valid values: <b>Y</b> = Yes, override leave accrual and do NOT accrue leave  <b>N</b> = Accrue leave</p> <p><i>The Override Accrue code is used when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i></p>
23	<p><b>Adj Lv Elig Date</b> (Adjusted Leave Eligibility Date): Optional</p> <p>Enter a valid eligibility date (MM/DD/CCYY) in the <b>Adj Lv Elig Date</b> (Adjusted Leave Eligibility Date) field where applicable. If a date is entered, and if leave accrual is determined by months of service, the <b>Adjusted Leave Eligibility Date</b> may be used to determine the employee's months of service instead of the employee's hire or rehire dates.</p> <p><i>The Adjusted Leave Eligibility Date is used when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i></p>
24	<p><b>Lv Reason Max:</b> Optional</p> <p>The <b>Lv Reason Max</b> (Leave Reason Maximum) defines the maximum number of days the employee can take for a leave reason code in the <i>Enhanced Substitute Pay and Employee Leave System</i>.</p> <p>When defining a leave reason code in the <i>Enhanced Substitute Pay and Employee Leave System</i>, the user is able to specify <u>variable</u> maximum allotments, depending on the employee. For example, a district leave policy may provide that some employees are allotted a maximum of 3 days of personal leave, other employees may be allowed 4 days of personal leave, and still other employees may be allowed 5 days of personal leave.</p> <p>When the <b>Maximum Days to Take for Leave Reason?</b> is set to 'Yes, employee maximum defined on PERSONNEL rec' for the leave reason code, the system will check the value in the employee's <b>Leave Reason Max</b> field to determine how much time they are allowed to take.</p> <p><i>The Leave Reason Maximum field is used when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i></p>

Step	Action
25	<p><b>Hours Per Day: Optional</b></p> <p>Enter the number of hours per day the employee works in the <b>Hours Per Day</b> field.</p> <p><i>The Hours Per Day field is necessary when the Enhanced Substitute Pay and Leave System is enabled on the Tax/Withholding/Control Menu. This field allows the system to convert hours to days when entering time off in the Substitute Pay and Leave System.</i></p>
26	<p>Enter the Social Security Number of the employee's spouse in the <b>Spouse SSN</b> (Spouse Social Security Number) field.</p>
27	<p>Enter the appropriate dates (MM/DD/CCYY) in the <b>Birth Date, Hire Date,</b> and the <b>Rehire Date</b> fields where applicable.</p> <p><i>When reactivating an employee, make the appropriate entry within the Rehire Date field.</i></p>
28	<p>Enter the appropriate date (MM/DD/CCYY) in the <b>Background Ck</b> (Background-Check Date) field where applicable.</p>
29	<p>Enter the appropriate date (MM/DD/CCYY) in the <b>Date of Death</b> field where applicable, if the employee has died.</p>
30	<p>Enter the <b>Elig for Rehire</b> (Eligible for Rehire) field. This field is a <i>Yes/No</i> flag which identifies whether or not the employee is eligible to be rehired.</p> <p>The <b>Eligible for Rehire</b> field will be initialized to 'Y' (Yes) when an employee is added to the system. If the district determines at any point in time that the employee is no longer eligible to be rehired, the <b>Eligible for Rehire</b> field can be manually changed to 'N' (No).</p> <p>Valid values:</p> <p style="padding-left: 40px;">Y – Yes, the employee is eligible for rehire N – No, the employee is not eligible for rehire</p> <p><i>The <b>Eligible for Rehire</b> field available for informational purposes only.</i></p>
31	<p>Enter the appropriate date (MM/DD/CCYY) in the <b>Term Date</b> (Termination Date) field where applicable.</p> <p>Enter the code or select the drop-down selection icon  in the <b>Term Reason</b> (Termination Reason Code) field to choose the employee's termination reason code.</p>








Step	Action
32	<p><b>Hours / Week:</b> Required if the <b>Participate in GHI?</b> field is set to ‘Y’.</p> <p>Enter the number of hours per week the employee works in the <b>Hours/Week</b> field.</p> <p>For more information, refer to <i>Section D: Monthly/Quarterly/Annual/Fiscal Report Processing, Topic 1: Processing Monthly Reports.</i></p>
33	<p><b>GHI Eligible?</b> field:</p> <p>Enter <b>Y</b> (Yes – Employee is eligible to receive benefits) or <b>N</b> (No – Employee is not eligible to receive benefits) in the field to choose the employee’s plan eligibility.</p> <p><i>This is a required field for SHBP/GHI reporting.</i></p> <p><i>When entering N (No), proceed to Step 39. Otherwise proceed to Step 34.</i></p>
34	<p><b>GHI 1<sup>st</sup> Day Wrk</b> (GHI First Day Worked) field: Required if the <b>GHI Eligible?</b> field is set to ‘Y’.</p> <p>Enter the first date (MM/DD/CCYY) for which the employee is compensated.</p>
35	<p><b>GHI Coverage Start</b> (GHI Coverage Start Date) field – Optional, but the <b>GHI Eligible?</b> field must be set to ‘Y’.</p> <p>Enter the date (MM/DD/CCYY) when the employee’s GHI benefit coverage starts.</p> <p>The <b>GHI Coverage Start</b> field is an optional field on the <i>Update/Display Personnel Data</i> screen. Per instructions from the Georgia State Health Agency, the <b>GHI Coverage Start</b> field should only be <b>used for summer transfers from May 1 through October 31</b>. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. According to the Georgia State Health Agency, the <b>BOE Coverage Start Date</b> field will allow payroll locations to start a transferring employee’s coverage on the exact date selected by the BOE without the date rolling forward an additional month.</p> <p><b>NOTE:</b> If the <b>GHI BOE Transfer</b> field is set to ‘Y’, but a <b>GHI Coverage Start Date</b> has not been entered, a <u>warning</u> message will be displayed.</p>
36	<p><b>GHI Final Ded Dt</b> (GHI Final Deduction Date) field:</p> <p>Enter the date (MM/DD/CCYY) of the employee’s final GHI deduction.</p>

Step	Action
37	<p><b>GHI Coverage End</b> (GHI Coverage End Date) field:</p> <p>Enter the date (MM/DD/CCYY) the employee’s GHI benefit coverage ends. This field should be used for employees who transfer to another school district in the state of Georgia.</p> <p>The date provided in the <b>BOE Coverage End Date</b> field will allow payroll locations to end a transferring employee’s coverage on the last day of the month selected by a BOE without the date rolling forward an additional month, regardless of the <b>Date of Last Deduction</b>. The date provided in this field will be used to replace the <b>Last Deduction Date</b> when determining the benefit end date in the ADP system.</p>
38	<p><b>GHI Change Code</b> field: Required if the <b>GHI Eligible?</b> field is set to ‘Y’.</p> <p>Select the drop-down selection icon  within the field to identify the reason for the employee’s GHI coverage change.</p> <p>The <b>GHI Change Code</b> field is used to generate the <i>SHBP Add and Update Transmission File</i> (AUF File). The purpose of the AUF file is to set up new employees and to provide updates on current employees to State Health. When the <b>GHI Change Code</b> field is changed from <b>MISC</b> to any other value, the corresponding GHI change record will be generated for the employee in the daily AUF transmission file.</p> <p>When changes are made and saved for the following employee fields, a <b>MISC</b> GHI change record will <u>automatically</u> be generated for the employee in the <i>SHBP Add and Update Transmission File</i> (AUF File):</p> <ul style="list-style-type: none"> <li>• First name</li> <li>• Last name</li> <li>• Middle name</li> <li>• Address (Address line 1)</li> <li>• Address L2 (Address line 2)</li> <li>• City</li> <li>• State</li> <li>• Zip</li> <li>• Telephone number</li> <li>• Hours Per Week</li> </ul>

Step	Action
39	<p>Enter <b>Y</b> (Yes), <b>N</b> (No) or <b>R</b> (Retired) in the <b>Tax Switches: Pension</b> field.</p> <p><i>For HB210/SB 327 TRS Retirees: Use <b>Pension Switch 'R'</b> for rehired TRS retirees. House Bill 210/Senate Bill 327 (HB 210/SB327) allows retired teachers to return to the teaching profession without a loss in TRS benefits. Although these teachers do not have to contribute to TRS, school districts must still pay all TRS employer contributions as if the retiree was an active member of TRS.</i></p> <p><i>The retirement Switch for these employees must be set to “R” (Retired). When using “R” (Retired) Switch, ensure that the <b>Pension Code</b> field reflects ‘2’ (TRS), the <b>Amt/%</b> field reflects ‘0.00’, and the <b>TRS service ind</b> field reflects ‘1’ (In-Service). This retirement Switch/pension code combination allows only the calculation of the employer’s share for TRS. GHI is also required for these returning teachers.</i></p>
40	<p><b>TRS/ERS Reporting - Required:</b> Enter the date (MM/DD/CCYY) in the <b>Pens Elig Date</b> (Pension Eligibility Date) to identify when the employee becomes eligible to participate in the TRS or ERS pension plan.</p> <p><i>TRS uses the pension eligibility date to precisely identify when an employee became eligible for their current pension. This is most important for TRS reporting in the case that a PSERS or Substitute employee changes job functions and becomes eligible to enroll in TRS. In this instance, the employee would retain their original hire date, but have a pension eligibility date tied to the date of the change of their job role.</i></p>
41	<p>Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>TRS DOE Paid ERCON?</b> (Teacher Retirement System-Georgia Department of Education Paid Employer Contribution) to identify the Georgia Department of Education’s employer-paid contribution to the school district’s retirement plan.</p> <p><i>When the Step 39-<b>Pension Switch</b> field’s entry is ‘R’ (Employer Pays <u>both</u> employer and employee TRS shares), the <b>TRS DOE Paid ERCON</b> (Department of Education pays the Employer’s Contribution) field <u>may not contain Y</u> (Yes) as the two settings are mutually exclusive. Additionally, the <b>TRS DOE Paid ERCON?</b> flag may only be set to <b>Y</b> (Yes) when the employee is enrolled in TRS (<b>Pension Code</b> entry is 2).</i></p>

Step	Action
42	<p><b>Health ins flag</b> (Health insurance flag) field: The <b>Health Insurance Flag</b> identifies the type of health insurance coverage the employee has, and is needed for CPI reporting. The CPI transmission file includes the <b>Health Insurance Flag</b> on the Personnel Demographic Information (B) record.</p> <p>Valid values for the <b>Health Insurance Flag</b> are:</p> <ul style="list-style-type: none"> <li><b>Y</b> - Employee participates in State Health Insurance</li> <li><b>N</b> - Employee does not participate in health insurance</li> <li><b>O</b> - Employee participates in some other health insurance option provided by the district</li> </ul> <p><i>If the employee's <b>GHI Participation switch</b> is 'Y', the <b>Health Insurance Flag</b> is defaulted to 'Y', and if the employee's <b>GHI Participation switch</b> is 'N', the <b>Health Insurance Flag</b> is defaulted to 'N'. When the district provides some other health insurance option for their employees, the <b>Health Insurance Flag</b> should be manually changed to 'O'.</i></p>
43	<p><b>Participate in GHI?</b> field:</p> <p>Enter <b>Y</b> (Yes – Employee participates in SHBP) or <b>N</b> (No – Employee does not participate in the SHBP) to choose the employee's plan participation.</p> <ul style="list-style-type: none"> <li>• Enter <b>N</b> (No) if the <b>GHI Option</b> field will be <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and the <b>GHI Tier</b> field will be <b>00</b> (No Coverage).</li> <li>• Enter <b>Y</b> (Yes) if the employee <b>GHI Option</b> and the <b>GHI Tier</b> fields will be codes other than <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and <b>00</b> (No Coverage).</li> </ul> <p>Starting <b>July 1, 2012</b>, Direct Billing for certificated employees covered by SHBP takes effect. SHBP moves from a percentage of state-based salaries for every SHBP-<i>eligible</i> certificated employee and instead begins paying a “direct” per member per month (PMPM) rate (i.e., a flat rate) for each certificated employee <i>enrolled</i> in the SHBP. <i>Therefore, an employer contribution will NOT be billed for employees with a <b>GHI Option</b> field of <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible).</i></p>

Step	Action
44	<p><b>GHI BOE Transfer in?</b> (GHI Board of Education Transfer) field – Required if the <b>GHI Eligible?</b> field is set to ‘Y’.</p> <p>Indicate whether or not the employee transferred from another school district.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li><b>Y</b> – Yes, the employee transferred from another school district</li> <li><b>N</b> – No, the employee did not transfer from another school district</li> <li><b>D</b> – Don’t know whether or not the employee transferred from another school district</li> </ul> <p>The <b>GHI BOE Trans?</b> field is mostly informational; however, this data should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly.</p>
45	<p><b>GHI Option and Tier</b> fields: Required if the <b>Participate in GHI?</b> field is set to ‘Y’.</p> <p>Enter or select the drop-down selection icon  within the <b>GHI Option</b> and <b>GHI Tier</b> fields to choose the GHI option and tier.</p> <p><i>For employees participating in GHI, the <b>GHI Option</b> field cannot be NC (No Coverage) or NE (Not Eligible), and the <b>GHI Tier</b> field cannot be 00 (No Coverage).</i></p>

Step	Action
<p><b>46</b></p>	<p><b>GHI Ded Cd</b> (GHI Deduction Code) field: Required if the <b>Participate in GHI?</b> field is set to 'Y'.</p> <p>Enter or select the drop-down selection icon  within the <b>GHI Ded Cd</b> (GHI Deduction Code) field to choose the GHI deduction code.</p> <p><i>An invalid entry in this field will generate the "Deduction Code not valid or not set up as SHBP Deduction" message. Refer to Section F: Description/Deduction/Annuity File Processing for instructions on the entry of this code.</i></p> <p><i>When a change is made to the <b>GHI Option</b> and/or <b>Tier</b> fields and the data is saved, PCGenesis offers the user the ability to automatically update the GHI deduction amount for the GHI deduction code on the employee's Deduction screen. See the sample dialog box below:</i></p> <div data-bbox="609 745 1230 1102" data-label="Image"> </div> <p><i>The Update/Display Deduction Data screen is accessed by selecting  (F23 - Go to Deduction Data) from the button bar at the bottom of the screen.</i></p>
<p><b>47</b></p>	<p>Select  (<b>Enter</b>).</p> <p>Select  (<b>F17</b> – Print this data) to obtain a screen print of the <i>Update/Display Personnel Information</i> screen. The screen print file will be available in the print queue with the name 'PSCNnnnn'.</p>

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSYS C:\SECOND WHITE - □ ×

**Update/Display Personnel Data** PAY02

Status A -- Active ALBARO, ANBERA

Emp. no. 88423 Pay Loc 201 Location 000201 Class 1 CLASSROOM TEACHERS  
 Sex Code E Work Loc 201 Location 000201 Job 3 TEACHER 4-8  
 Mar Stat S SSN 999 08 8423 EEO-5 Job A06 Second Teacher  
 Ethnic 2 WHITE

NAME First ANBERA Middle \_\_\_\_\_  
 Last ALBARO Suffix \_\_\_\_\_ Prefix \_\_\_\_\_


Address 2601 MAIN STREET Certificate Type T5 EEO-5 and CPI Ethnic/Race:  
 Address L2 \_\_\_\_\_ CS1 Job (from CPI) 106 Hispanic/Latino Ethnicity?  
 City/State SMITH, GA Include on CPI ? Y  Yes  No  
 Zip Code 33333 County 160 Sick Bank ? N Race (Select all that apply)  
 Phone (999)555-1628 Out of State \_\_\_\_\_ Substitute rank \_\_\_\_\_  Yes  No Am Indian Alaskan  
 Cell phone ( )000-0000 Override accrue? \_\_\_\_\_  Yes  No White  
 Adj Lv Elig Date \_\_\_\_\_  Yes  No Asian  
 Lv Reason Max \_\_\_\_\_  Yes  No Hawaiian Pacific  
 Hours Per Day 8.000

Spouse SSN \_\_\_\_\_  
 Birth Date 4/01/1969 Pension sw Y  
 Hire Date 8/02/2018 Hrs/Week 40.00 Pens Elig Date 8/02/2018  
 Rehire Date \_\_\_\_\_ GHI Eligible ? Y TRS DOE Paid ERCON ? N  
 Background Ck \_\_\_\_\_ GHI 1ST Day Wrk 8/02/2018 Health ins flag Y  
 Date of Death \_\_\_\_\_ GHI Cover Start 10/01/2018 Participate in GHI ? Y  
 Elig for Rehire Y GHI Final Ded Dt \_\_\_\_\_ GHI BOE Transfer in? Y  
 Term Date \_\_\_\_\_ GHI Coverage End \_\_\_\_\_ GHI Option K1 KAISER HMO  
 Term Reason \_\_\_\_\_ GHI Change Code NEMP GHI Tier 96 FAMILY  
 GHI Ded Cd 9

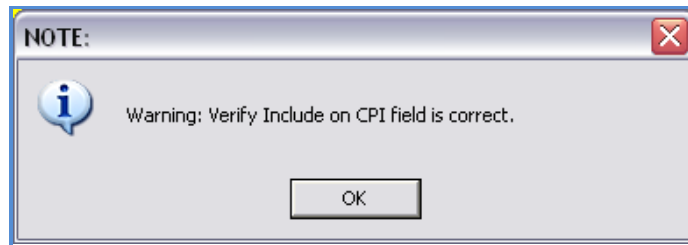
Validations passed. Save your changes.


19.03.01

ENTER ✓ F1 ▶ F2 ⏪ F3 🖨 F4 📄 F5 ⏴ F6 ⏵ F7 📄 F8 💾 F9 ⏴ F10 📄 F11 📄 F12 📄 F15 🔍  
 F16 ⏴ F17 📄 F18 🗑 Per Ded Grs W/H Lv Ytd Help Adj FICA Gar

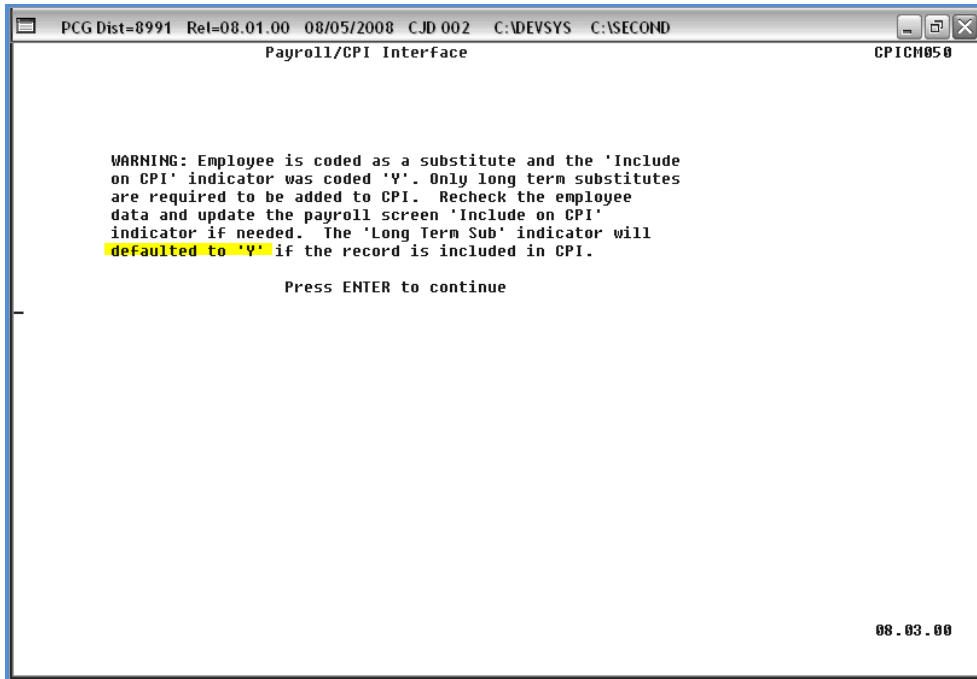
Step	Action
48	Verify “Validations passed. Save your changes.” displays and select  (F8 – Save changes).


For Classified (Non-certified) employees, the following dialog box displays:



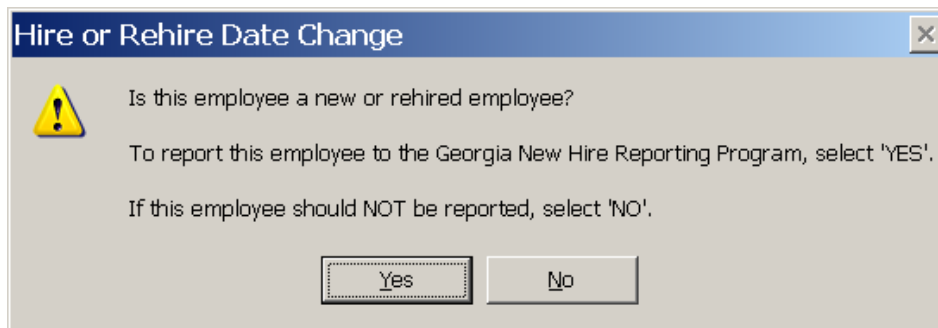
Step	Action
49	Select  (OK).

For substitute employees, the following screen displays:

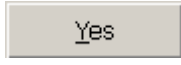



Step	Action
50	Review the <i>Payroll/CPI Interface</i> screen's information, and select <b>Enter</b> . When changing the employee's "Include on CPI?" flag from 'N' (no) to 'Y' (yes), the preceding screen displays after  (Enter) is selected in Step 47.

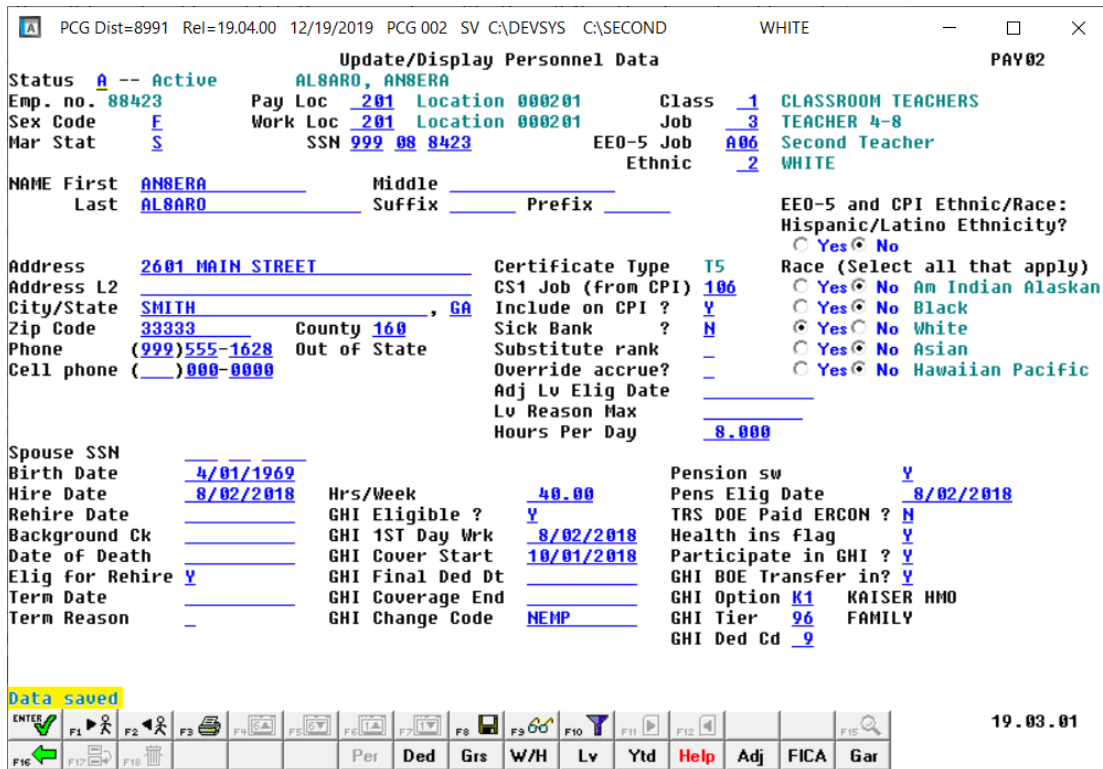
If the employee's hire or rehire date has changed, the following dialog box displays:





Step	Action
51	<p><b>Hire or rehire date change:</b> If the system detects a change to either the employee’s hire date or rehire date, the <i>Hire or Rehire Date Change</i> dialog box will be displayed. If this employee is a new employee or a rehired employee, select  (Yes). If this employee is NOT a new employee or a rehired employee, select  (No).</p> <p><i>If Yes is selected, the employee will be reported to the Georgia New Hire Reporting Program. Refer to <u>Payroll System Operations Guide, Section I: Special Functions, Topic 8: Payroll Export and Import File Processing, Topic 8E: Payroll New Hire Export and Import File Processing</u> for additional information on the New Hire Export.</i></p>

The following screen displays:



PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY\ C:\SECOND WHITE - □ ×

Update/Display Personnel Data PAY02

Status **A** -- Active AL8ARO, AN8ERA

Emp. no. 88423 Pay Loc 201 Location 000201 Class 1 CLASSROOM TEACHERS

Sex Code E Work Loc 201 Location 000201 Job 3 TEACHER 4-8

Mar Stat S SSN 999 08 8423 EEO-5 Job A06 Second Teacher

Ethnic 2 WHITE

NAME First AN8ERA Middle \_\_\_\_\_

Last AL8ARO Suffix \_\_\_\_\_ Prefix \_\_\_\_\_

EEO-5 and CPI Ethnic/Race:  
Hispanic/Latino Ethnicity?  
 Yes  No

Race (Select all that apply)  
 Yes  No Am Indian Alaskan

Yes  No Black

Yes  No White

Yes  No Asian

Yes  No Hawaiian Pacific

Address 2601 MAIN STREET Certificate Type T5

Address L2 \_\_\_\_\_ CS1 Job (From CPI) 106

City/State SMITH, GA Include on CPI ? Y

Zip Code 33333 County 160 Sick Bank ? N

Phone (999)555-1628 Out of State Substitute rank -

Cell phone ( ) 000-0000 Override accrue? -

Adj Lv Elig Date \_\_\_\_\_

Lv Reason Max \_\_\_\_\_

Hours Per Day 8.000

Spouse SSN \_\_\_\_\_

Birth Date 4/01/1969 Pension sw Y

Hire Date 8/02/2018 Hrs/Week 40.00 Pens Elig Date 8/02/2018

Rehire Date \_\_\_\_\_ GHI Eligible ? Y TRS DOE Paid ERCON ? N

Background Ck \_\_\_\_\_ GHI 1ST Day Wrk 8/02/2018 Health ins flag Y

Date of Death \_\_\_\_\_ GHI Cover Start 10/01/2018 Participate in GHI ? Y

Elig for Rehire Y GHI Final Ded Dt \_\_\_\_\_ GHI BOE Transfer in? Y

Term Date \_\_\_\_\_ GHI Coverage End \_\_\_\_\_ GHI Option K1 KAISER HMO


Term Reason - GHI Change Code NEMP GHI Tier 96 FAMILY

GHI Ded Cd 9

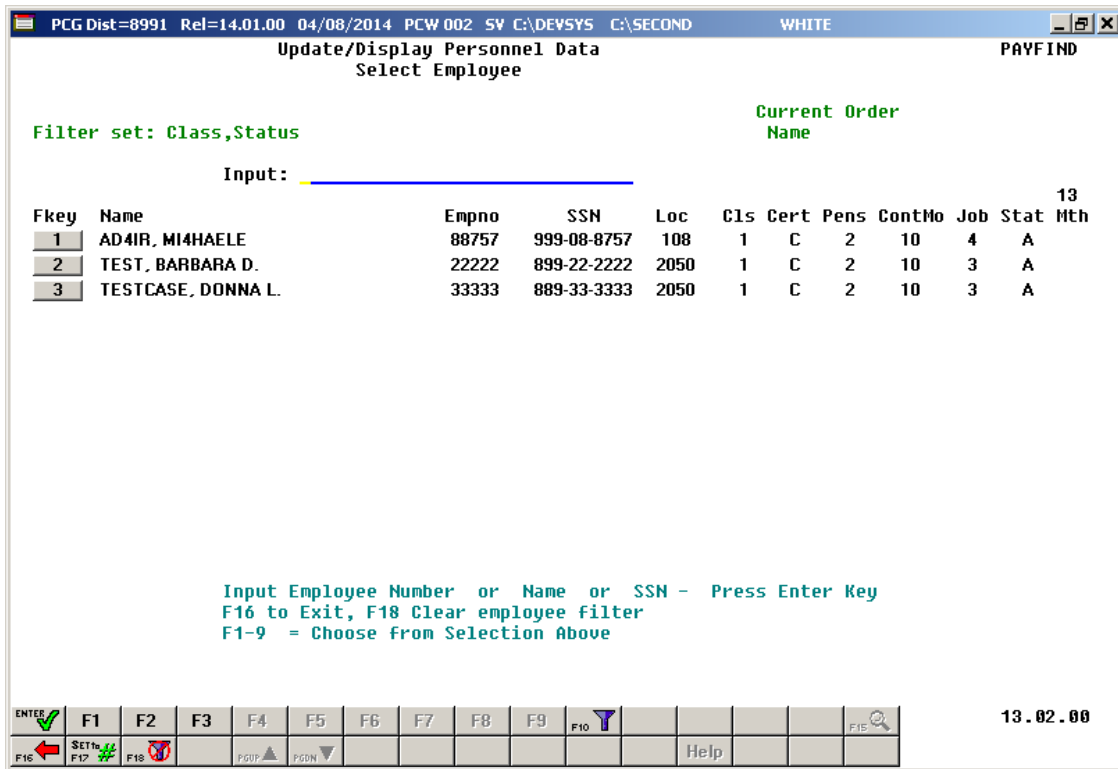
Data saved


ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15

F16 F17 F18 Per Ded Grs W/H Lv Ytd Help Adj FICA Gar 19.03.01

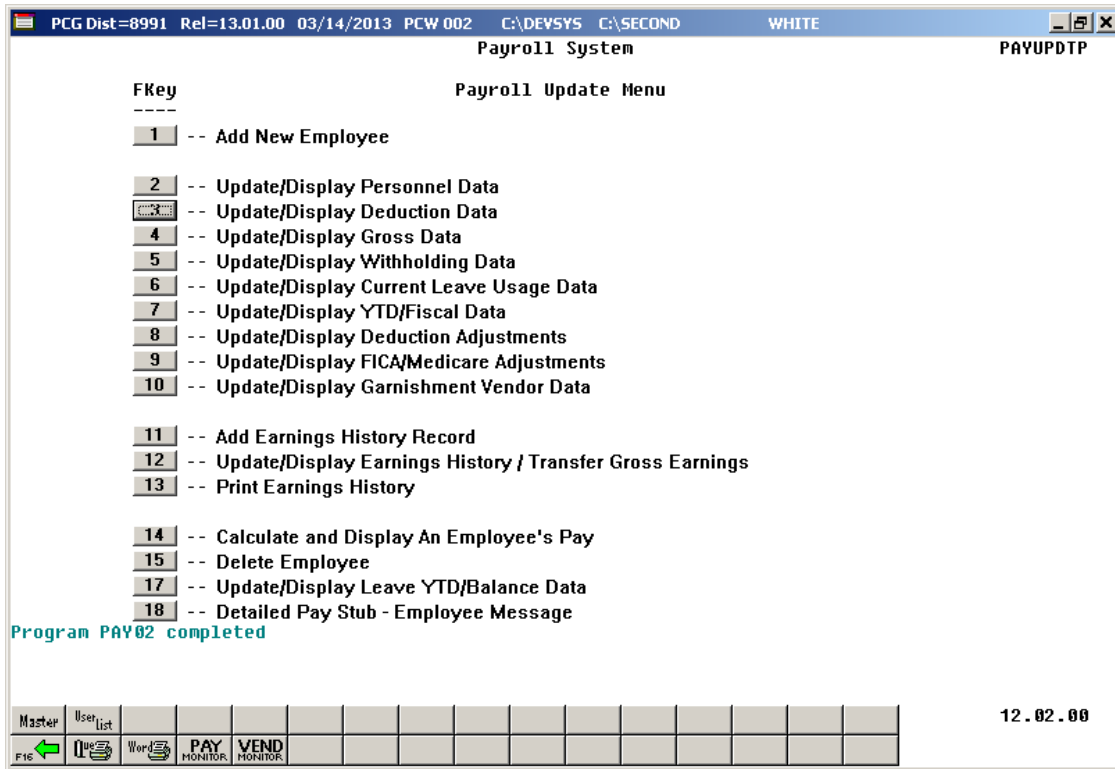
Step	Action
52	<p>Verify “Data saved” displays, and select  (F16 – Exit) to the <i>Display/Update Personnel Data - Select Employee</i> screen.</p>



The following screen displays:



Step	Action
53	Select  (F16 – Exit) to return to the <i>Payroll System – Payroll Update Menu</i> .

The following screen displays:



Step	Action
54	Select  (F16 - Exit) to return to the <i>Payroll System Master Menu</i> , or select  ( <b>Master</b> ) to return to the <i>Business Applications Master Menu</i> .