PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

6/17/2016	Section I: Special Functions

[Topic 7: Delete Employee Processing, V2.4]

Revision History

Date	Version	Description	Author
6/17/2016	2.4	16.02.00 – Update menu and screen shots.	D. Ochala
5/12/2016	2.3	16.01.00 – Update Logo and Footers.	S. Scrivens
12/2/2011	2.2	11.03.01 – New DOE logo. Updated footer.	D. Ochala
10/02/2008	2.1	08.03.00 – Updated screenshot examples, *Special Functions Menu* reorganization.	C. W. Jones
07/07/2008	2.0	08.02.00 –Added updated *Select Employee* screen information and instructions.	C. W. Jones

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Overview

Employee record deletion includes the following procedures:

- Creating a listing of employee records without earnings history information to determine if the records require removal from PCGenesis. Refer to *B1. Employees with No Earnings History Report – Example* for an example of this report.

  Employees will not be deleted if the **Include on CPI?** flag is set to **Y** (Yes). The *Earnings History Report* will identify the records of this type. Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information* for the instructions to reset the **Include on CPI?** flag.

- Deleting specific employee's records and generating a listing of the records deleted. Refer to *C1. Employees with No Earnings History/Removed from Payroll File – Example* for an example of this report.

The following guidelines apply to deleting employee information:

- PCGenesis does not allow the deletion of employee records with earnings history information until the user removes the information from the PCGenesis *HISTORY* file.

- *Inactivating* an employee's record allows the clearing of all gross salary information, and prevents payroll processing for the employee. For example, when an employee is on leave without pay, or when an employee will not receive pay during a specific time frame, the record should be *inactivated*. For the employee to be included in payroll processing at a later point in time, reactivate the employee's record; that is, the PCGenesis user must reverse the *inactivation*. On the other hand, after an employee's record has been deleted, all of the employee's payroll information must be re-entered.

Selecting (F15 – Description Code Lookup) and (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: Printing the Employees without Earnings History Report

Step	Action
1	From the *Business Applications Master Menu*, select ___2___ (**F2** - Payroll System).

The following screen displays:
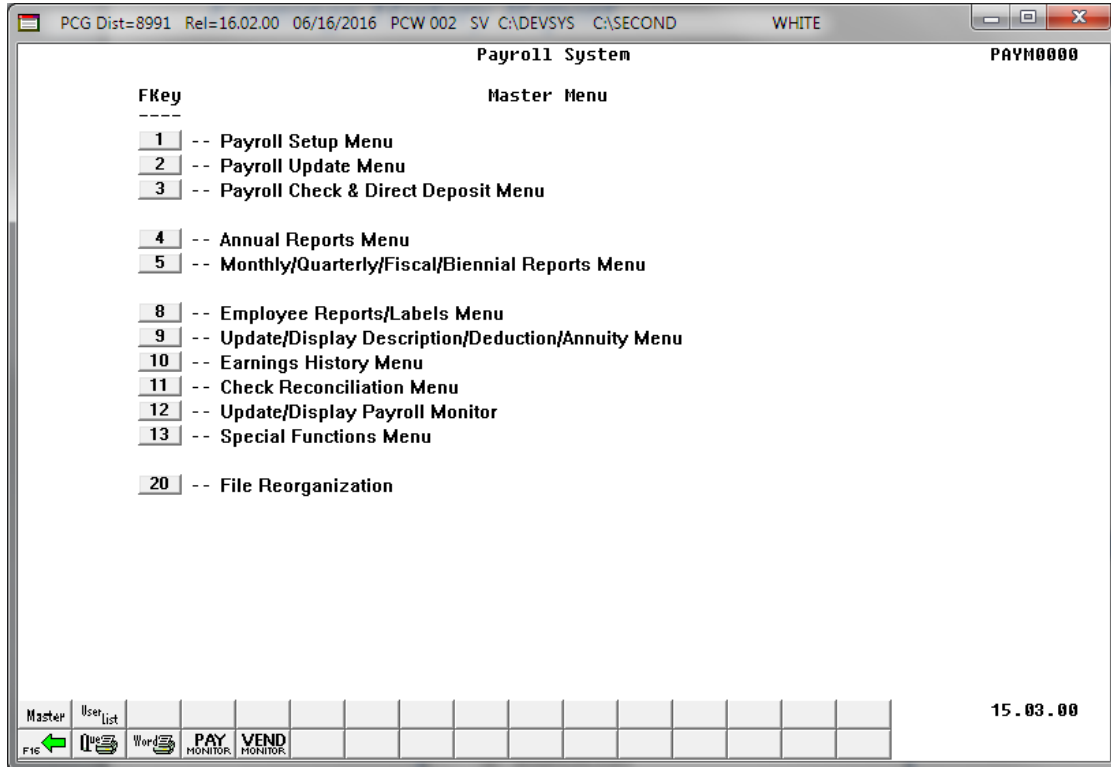
Step	Action
2	Select ___13___ (**F13** - Special Functions Menu).

The following screen displays:
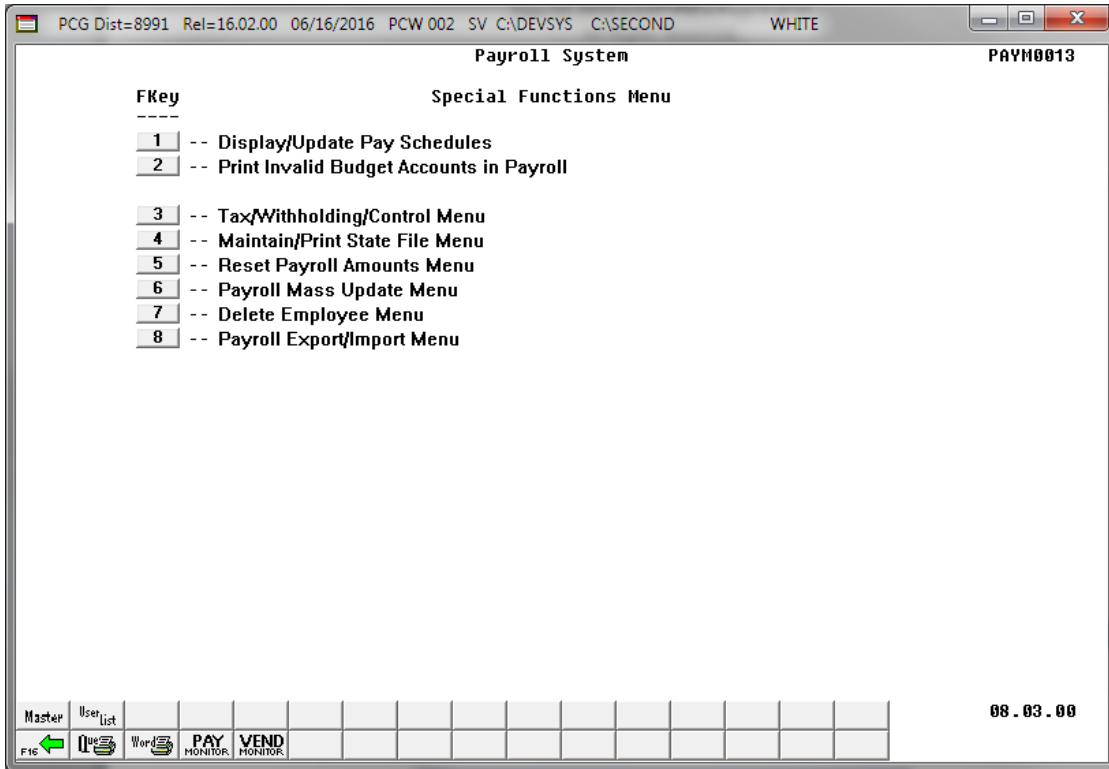
Step	Action
3	Select ⬚**7** (**F7** – Delete Employee Menu).

The following screen displays:

Step	Action
4	Select ▭1▭ (**F1** - List Employees with no Earnings History). *"Processing Request "briefly displays. The Payroll System – Delete Employee Menu redisplays.*
5	**To print the report via the Uqueue Print Manager:** Select 🖶 (**Uqueue**). **To print the report via Microsoft® Word:** Select 🖶 (**MS WORD**). Where appropriate, follow the instructions provided in the *Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature.
6	Select ⬅ (**F16** - Exit) to return to the *Payroll System - Special Functions Menu,* or select 🔲 (**Master**) to return to the *Business Applications Master Menu.*

B1. Employees with No Earnings History Report – Example

Employees will not be deleted if the **Include on CPI?** flag is set to **Y** (Yes). The *Earnings History Report* will identify the records of this type.

Refer to the *Payroll System Operations Guide*, *Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information* for the instructions to reset the **Include on CPI?** flag.

The final page of the report lists overall employee totals.

```
REPORT DATE:  06/16/2016                   EMPLOYEES WITH NO EARNINGS HISTORY                              PAGE  17

   EMPNO      EMPLOYEE NAME                STATUS    SOC SEC NO    LOC    CLASS   TERM DATE   TERM CODE    CPI FLAG
   89269      WA4GONER, MI4AELA              I       899-18-9269   3050    18     06/01/98        1           N
   88445      WA4T, RA4MUNDO                 I       899-18-8445   2050    18                                 N
   89645      WA4T, ST4FANY                  I       899-18-9645   0001    13     03/01/95        9           N
   87995      WA6, JO6NETTE                  I       899-18-7995   6790    03                                 N
   89195      WA6, TR6Y                      I       899-18-9195   0195    02                                 N
   88283      WA6EFIELD, RE6TA               T       899-18-8283   6790    05     05/01/01        6           N
   89314      WA7ERMAN, CH7NCE               I       899-18-9314   0195    15     07/01/00        1           N
   88137      WA8DEN, AL8C                   I       899-18-8137   2050    11     02/01/97        9           N
   89337      WA8DEN, AN8ELICA               I       899-18-9337   0201    01     05/01/01        9           N
   88696      WA9DRON, CA9MEN                I       899-18-8696   2050    01     06/01/96        9           N
   89344      WA9LIS, JO9NIE                 T       899-18-9344   3051    18     06/01/96        6           N
   88855      WE2MS, BR2DY                   I       899-18-8855   6790    10     09/01/97        9           N
   89279      WE2NER, JA2AR                  I       899-18-9279   6790    03                                 N
   88383      WE2ZEL, GR2SEL                 I       899-18-8383   0195    03     04/01/99        9           N
   87878      WE3TMORELAND, JU3TA            I       899-18-7878   6790    03                                 N
   87797      WE4NSTEIN, TE4INA              I       899-18-7797   0195    02     05/01/00        9           N
   88789      WE4TBROOK, EL4OOD              I       899-18-8789   0001    14     08/01/95        9           N
   89989      WE4TBROOK, OT4O                I       899-18-9989   6790    21                                 N
   88467      WE6LER, SH6YNE                 I       899-18-8467   2052    01     06/01/98        6           N
   88209      WE8LMAN, OS8ALDO               I       899-18-8209   6790    03                                 N
   89822      WH3TLOCK, AL3SSANDRA           I       899-18-9822   2050    16                                 N
   88029      WH4AT, CE4INDA                 I       899-18-8029   6792    08     06/01/96        1           N
   87373      WH4TMORE, FR4D                 T       899-18-7373   2052    01     06/01/98        6           N
   87532      WH5TT, DA5CEL                  I       899-18-7532   2050    02     06/01/92        9           N
   88035      WH6TING, JE6ROLD               I       899-18-8035   0195    16                                 N
   89706      WH7TLEY, GO7ZALO               I       899-18-9706   0101    21                                 N
   89540      ZE5GLER, DO5NETTE              I       899-18-9540   0001    13                                 N
   88520      ZE9EDA, CH9RITA                I       899-18-8520   6790    03                                 N
   89720      ZE9EDA, LO9D                   I       899-18-9720   6790    03                                 N


            *** TOTAL EMPLOYEES WITH NO EARNINGS     900 ***
            INCLUDE ON CPI FLAG MUST BE N IN ORDER TO DELETE THE EMPLOYEE
```
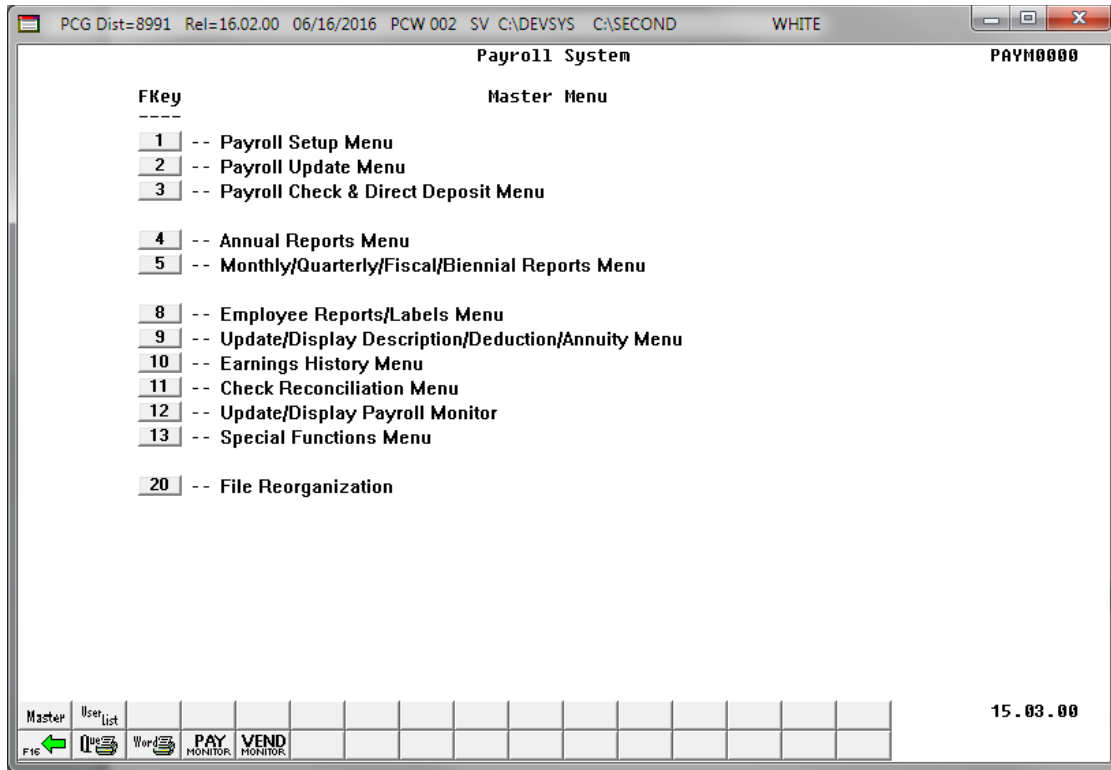
Procedure C: Deleting Individual Employee Information

```
PCG Dist=8991  Rel=16.02.00  06/16/2016  PCW 002  SV C:\DEVSYS  C:\SECOND        WHITE
                               Payroll System                                PAYM0000
     FKey                       Master Menu
     ----
       1  -- Payroll Setup Menu
       2  -- Payroll Update Menu
       3  -- Payroll Check & Direct Deposit Menu

       4  -- Annual Reports Menu
       5  -- Monthly/Quarterly/Fiscal/Biennial Reports Menu

       8  -- Employee Reports/Labels Menu
       9  -- Update/Display Description/Deduction/Annuity Menu
      10  -- Earnings History Menu
      11  -- Check Reconciliation Menu
      12  -- Update/Display Payroll Monitor
      13  -- Special Functions Menu

      20  -- File Reorganization


                                                              15.03.00
 Master UserList
 F16  Que  Word  PAY      VEND
            MONITOR  MONITOR
```

Step	Action
1	**Payroll Update Menu:** Select ⬚2 (**F2** - Payroll Update Menu) and proceed to *Step 2*. **Special Functions Menu:** Select ⬚13 (**F13** - Special Functions Menu) and proceed to *Step 3*.

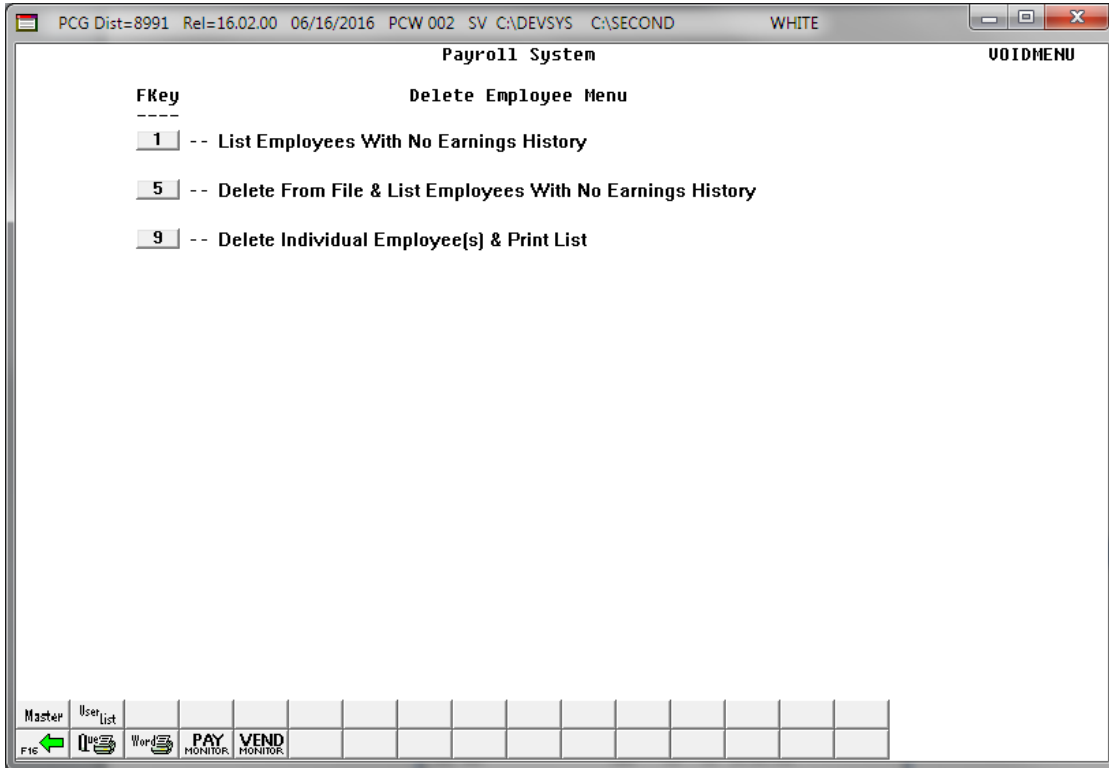For **Step 1-F2** selections, the following screen displays:
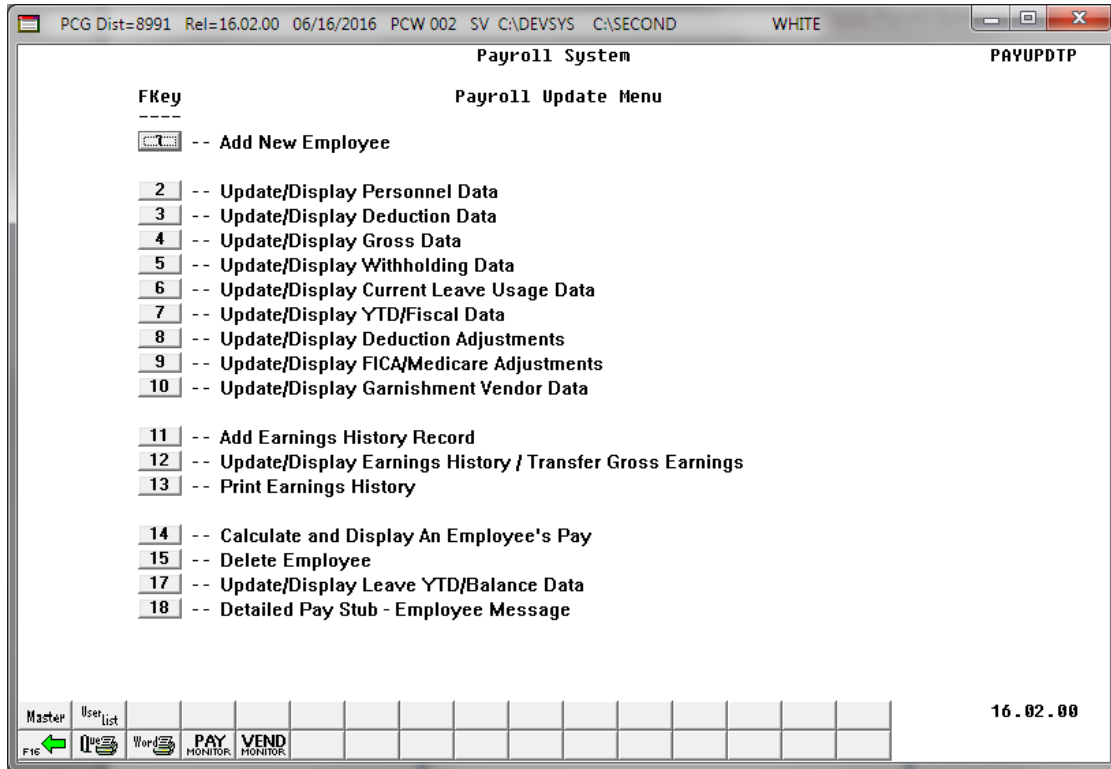
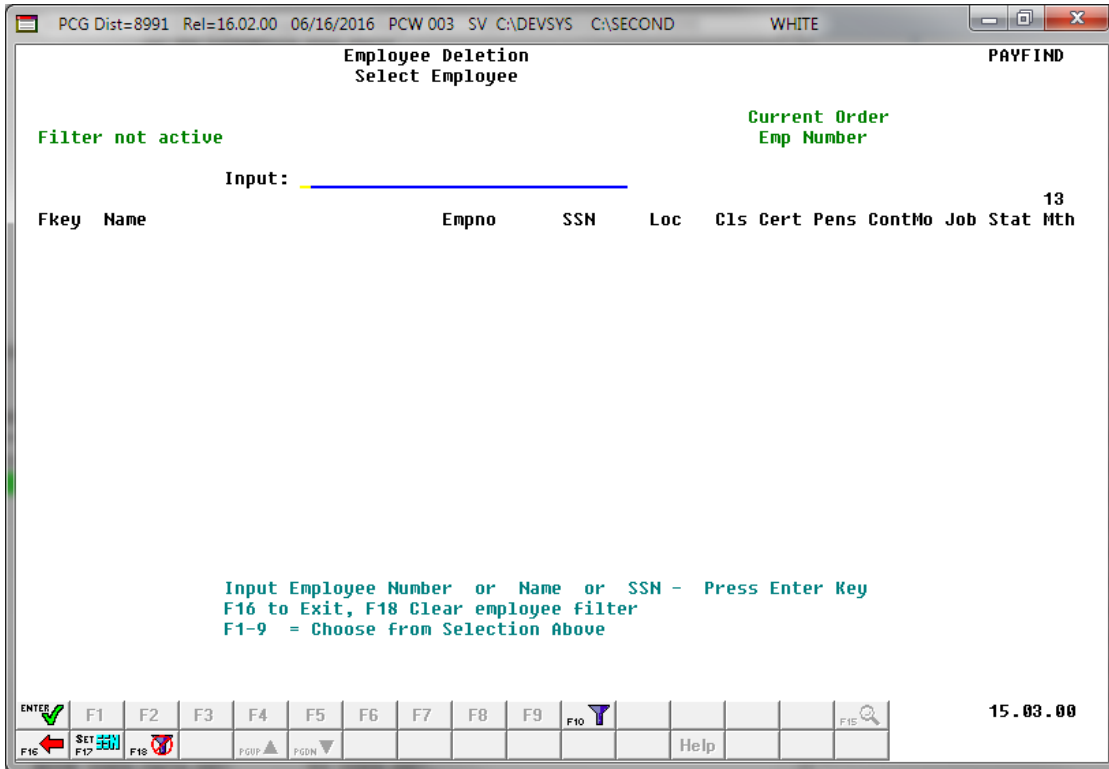For **Step1-F13** selections, the following screen displays:
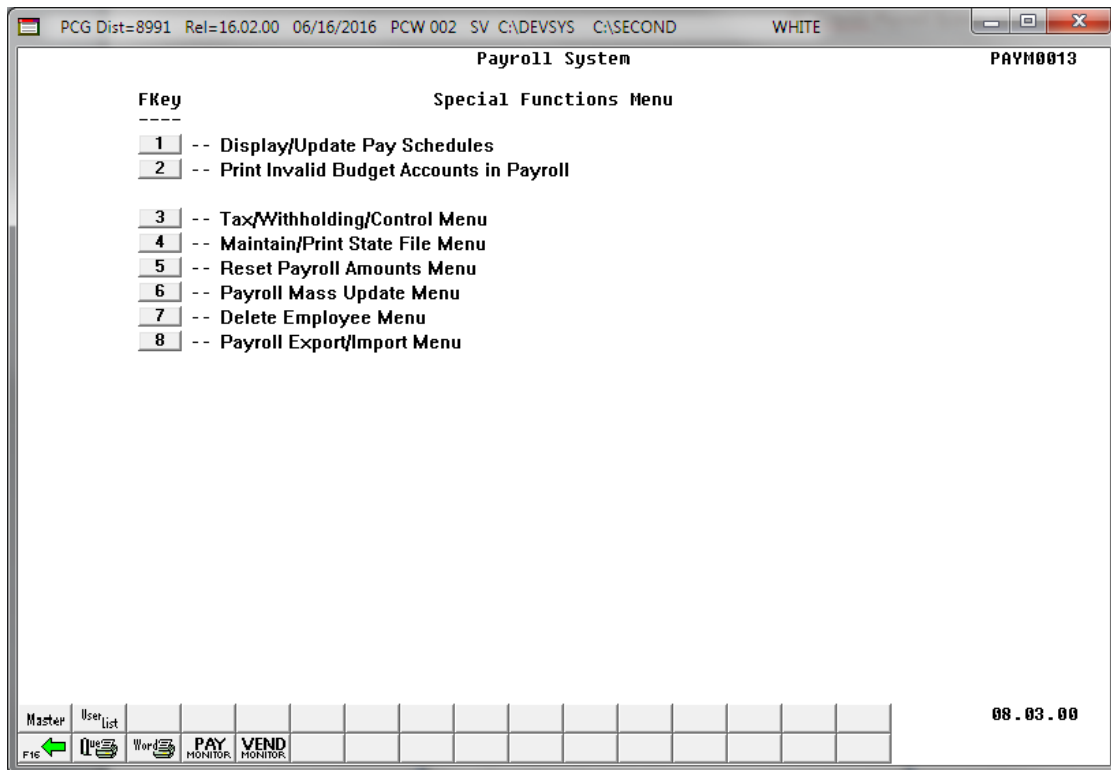
Step	Action
2	**For Step 1-F2** selections**:** Select ⬜15 (**F15** - Delete Employee), and proceed to *Step 4*.
	For Step 1-F13 selections**:** Select ⬜7 (**F7 – Delete Employee Menu)**, and proceed to *Step 3.*

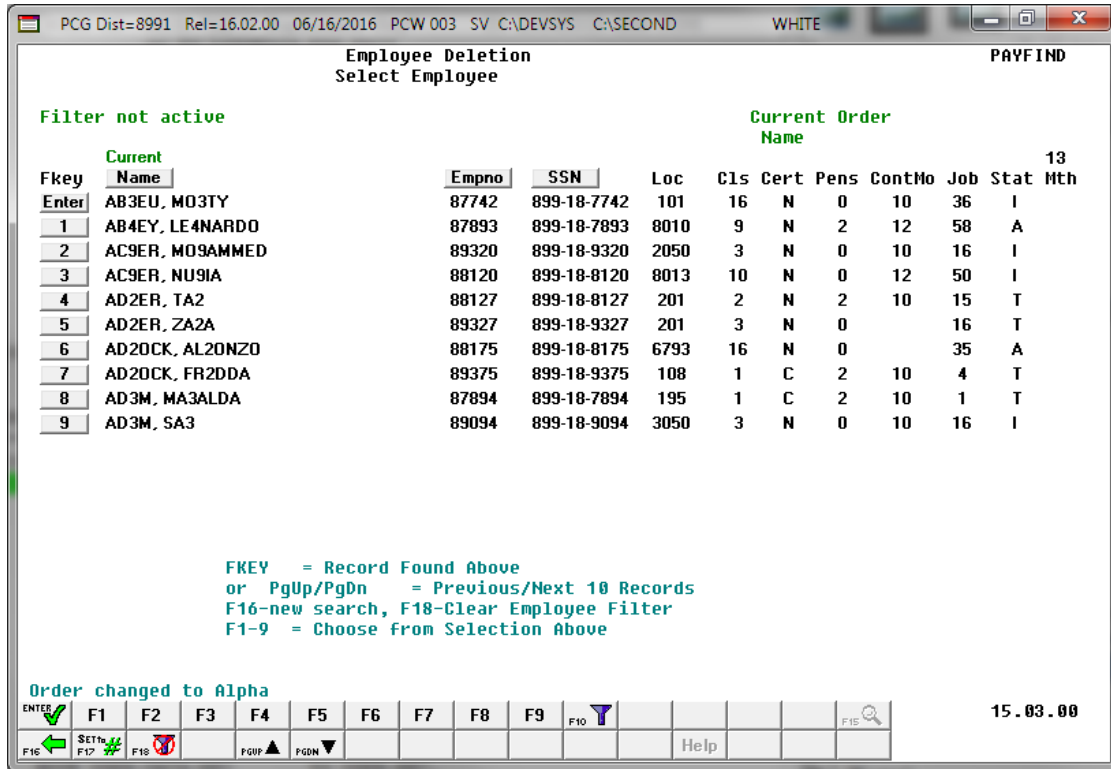For **Step 1-F13** selections, the following screen displays:

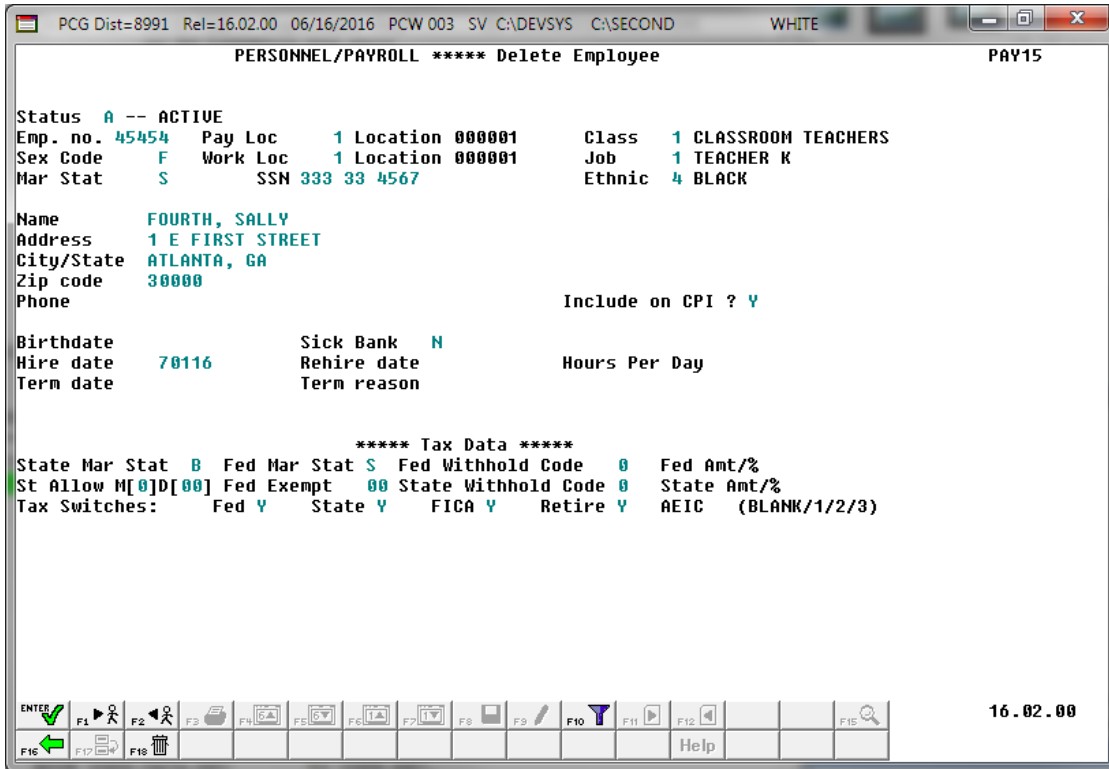| Step	Action
3	Select ⬜9 (**F9** - Delete Individual Employee(s) & Print List).

The following screen displays:

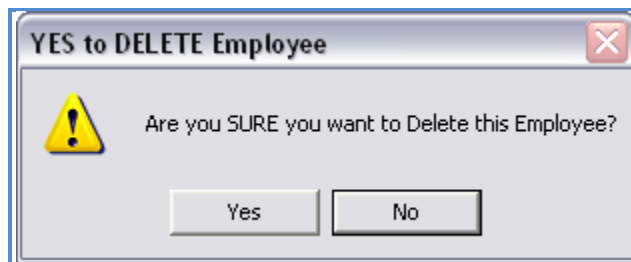| Step	Action
4	Enter the number in the **Input** field, select **Enter,** and proceed to *Step 6*.
	If the employee number is unknown, enter the employee's complete or partial name in the Name field, or Social Security Number in the field, and select Enter. Entering a complete or partial name in the Name field displays the results most closely matching the search criteria entered. Select Enter or the Function key corresponding to the employee's record.

The following screen displays:

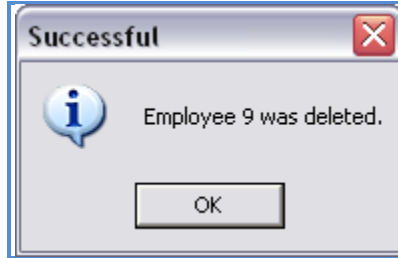| Step	Action
5	Select **Enter** (**Enter**) or select the Function key corresponding to the employee's record, and select (**Enter**).
	To sort by Name: Select **Name** (**Name**).
	To sort by Employee Number: Select **Empno** (**Empno**).
	To sort by Social Security Number: Select **SSN** (**SSN**).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

The following screen displays

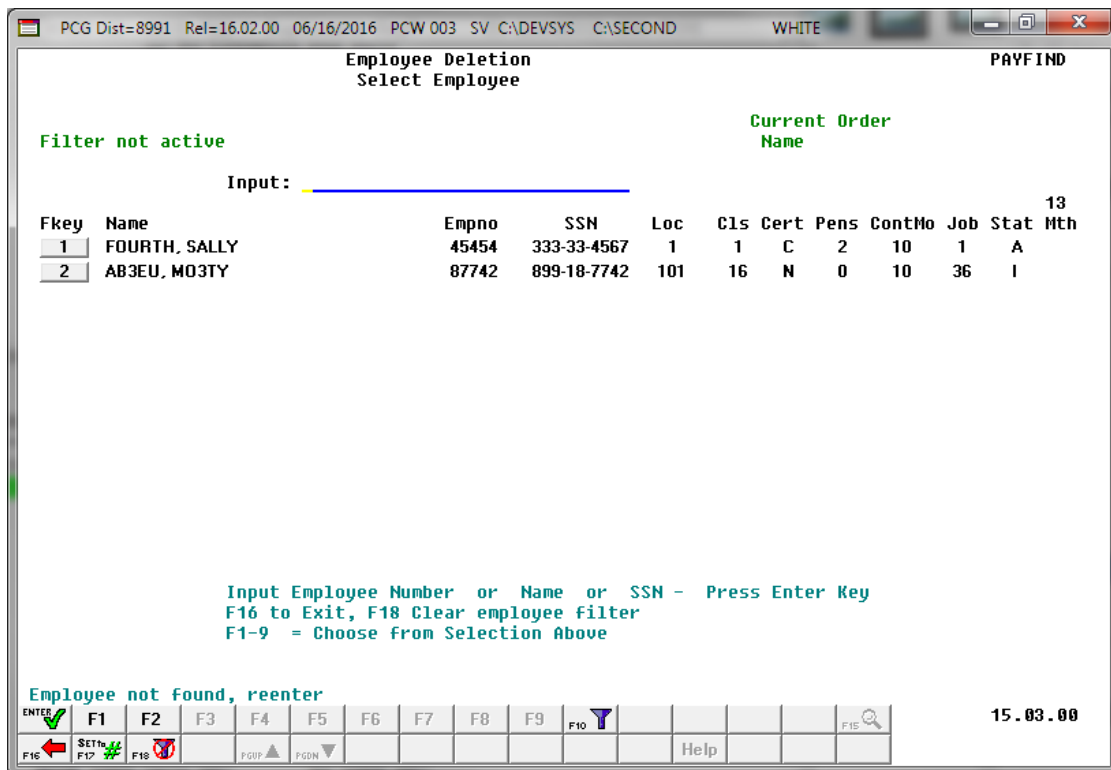| Step	Action
6	Select ![F18](trash icon) (**F18** – Delete Employee). *If the employee's **Include on CPI?** flag has been set to **Y** (Yes), the "Employee Has Include on CPI Set to Y *** Cannot be Deleted" message displays at the bottom of the screen. In this instance, reset the employee's **Include on CPI?** flag to **N** (No). Refer to the Overview for additional information.* *If the employee's record contains earnings history information, the "Employee Has Earnings History Records *** Cannot be Deleted" message displays at the bottom of the screen. In this instance, contact the Technology Management Customer Support Center for assistance.*

The following dialog box displays:

Step	Action
7	Select [Yes] (**Yes**).

The following dialog box displays:

Successful ✕

ℹ Employee 9 was deleted.

[OK]

Step	Action
8	Select [OK] (**OK**).

The following screen displays:

```
  PCG Dist=8991  Rel=16.02.00  06/16/2016  PCW 003  SV C:\DEVSYS  C:\SECOND        WHITE          ⬚ ⬚ ✕
                               Employee Deletion                                              PAYFIND
                               Select Employee

                                                                  Current Order
     Filter not active                                                Name

                     Input: _____
                                                                                                    13
     Fkey   Name                       Empno       SSN       Loc   Cls Cert Pens ContMo Job Stat Mth
      1  │  FOURTH, SALLY              45454    333-33-4567    1     1   C    2     10    1   A
      2  │  AB3EU, MO3TY              87742    899-18-7742   101    16   N    0     10    36  I




                         Input Employee Number  or  Name  or  SSN -  Press Enter Key
                         F16 to Exit, F18 Clear employee filter
                         F1-9  = Choose from Selection Above

     Employee not found, reenter
    ENTER✓  F1  F2  F3   F4   F5   F6   F7   F8   F9  F10▼                      F15🔍      15.03.00
    F16⬅ F17# F18🚫      PGUP▲ PGDN▼                        Help
```

Step	Action
9	**Payroll System – Payroll Update Menu:** Select F16 (**F16** – Exit) to return to the *Payroll System - Payroll Update Menu*. **Special Functions Menu:** Select F16 (**F16** – Exit) to return to the *Payroll System – Payroll Delete Employee Menu,* and select F16 (**F16** – Exit) to return to the *Payroll System Special Functions Menu*.

For **Step1-F2** selections, the following screen displays:

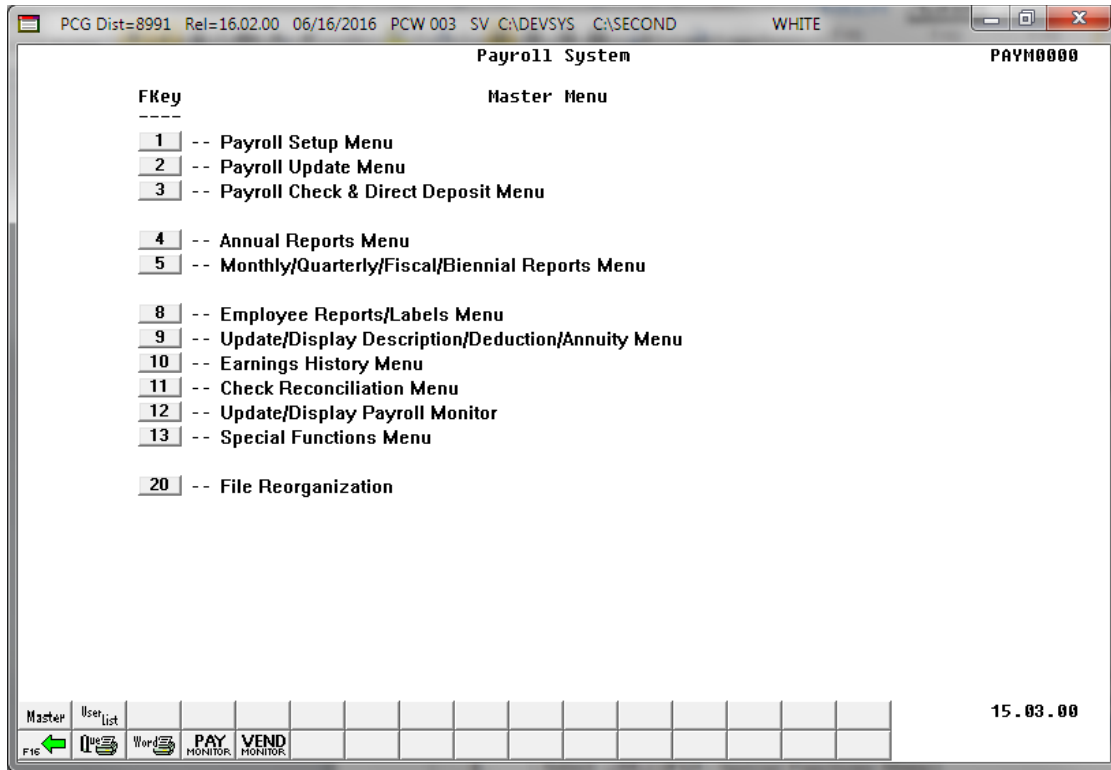**For Step 1-F13** selections, the following screen displays:

Step	Action
10	**To print the report via the Uqueue Print Manager:** Select ![Uqueue icon] (**Uqueue**). **To print the report via Microsoft® Word:** Select ![Word icon] (**MS WORD**). Where appropriate, follow the instructions provided in the *Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature.
11	Select ![F16 icon] (**F16** - Exit) to return to the *Payroll System Master Menu,* or select ![Master icon] (**Master**) to return to the *Business Applications Master Menu.*

## *C1. Individual Employee Records with No Earnings History/Removed from Payroll Master File Report – Example*

```
REPORT DATE:  06/16/2016                    EMPLOYEES WITH NO EARNINGS HISTORY                         PAGE   1
                                          ** REMOVED FROM PAYROLL MASTER FILE **

             EMPNO        EMPLOYEE NAME                    STATUS      SOC SEC NO      LOC     CLASS

             45454        FOURTH, SALLY                      A        333-33-4567      01       01
                          1 E FIRST STREET
                          ATLANTA, GA              30000


                          *** TOTAL EMPLOYEES DELETED FROM FILE      1 ***
```

Procedure D: Delete from file and List Employees Records without Earnings History Information
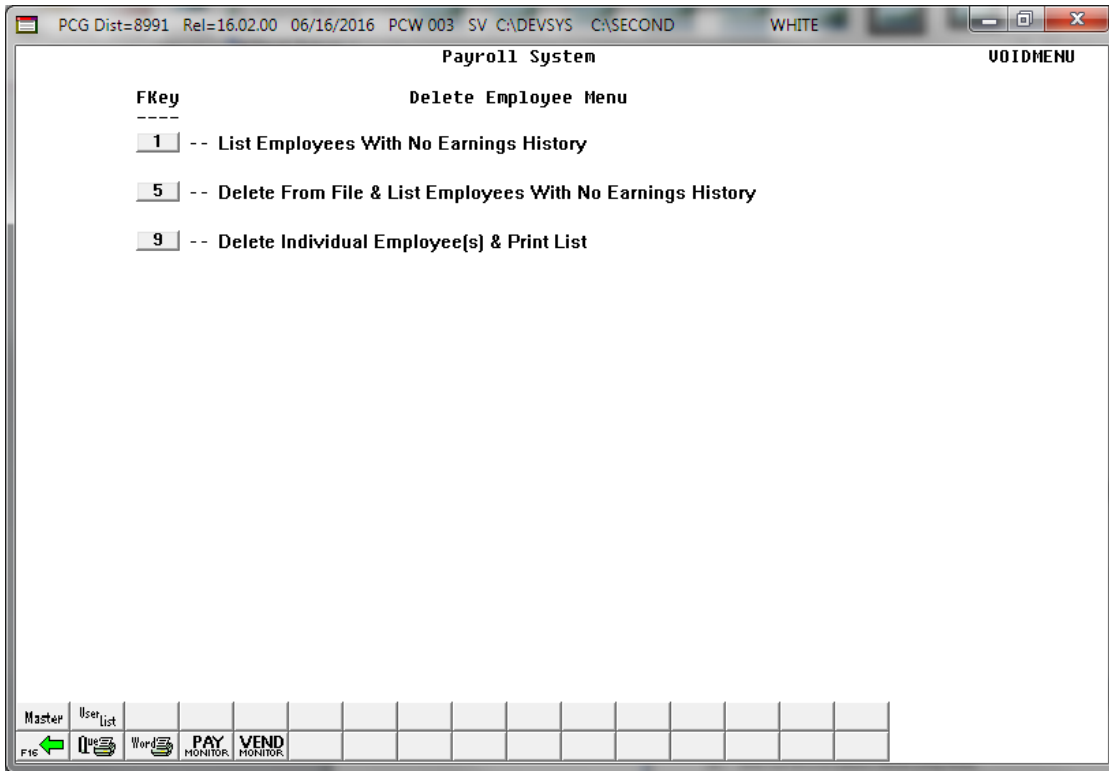

Step	Action
1	Select ___13___ (**F13 -** Special Functions Menu).

The following screen displays:
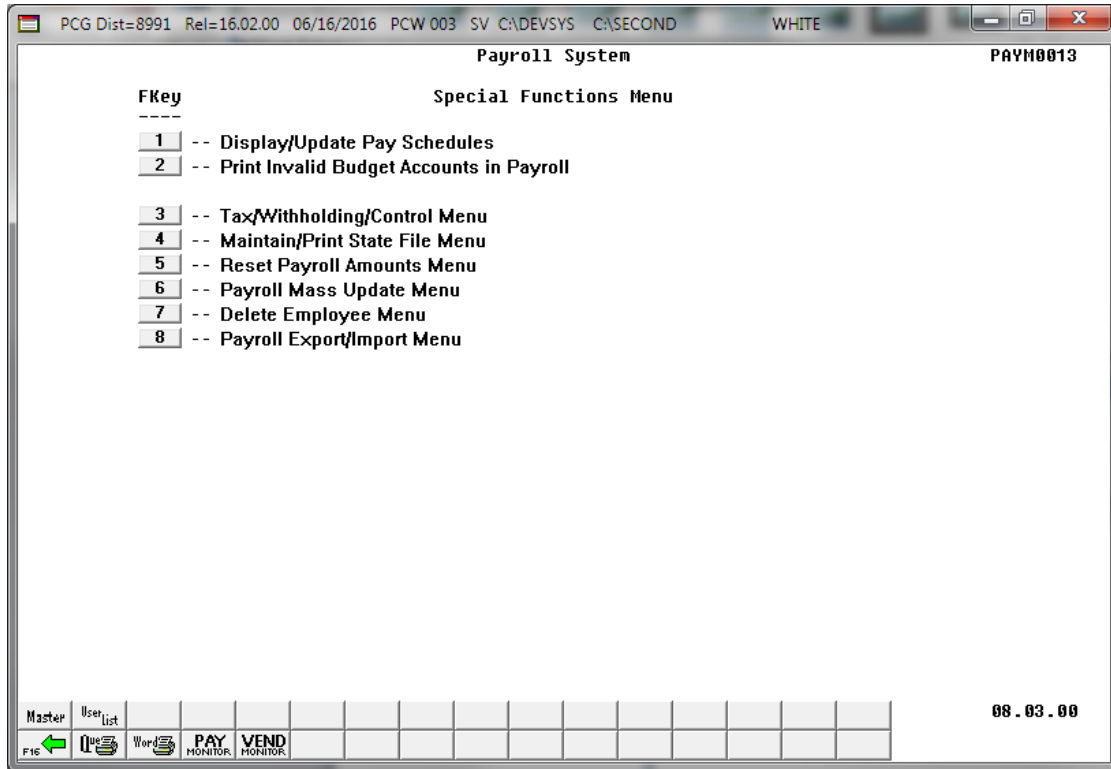
Step	Action
2	Select ___7___ (**F7** – Delete Employee Menu).

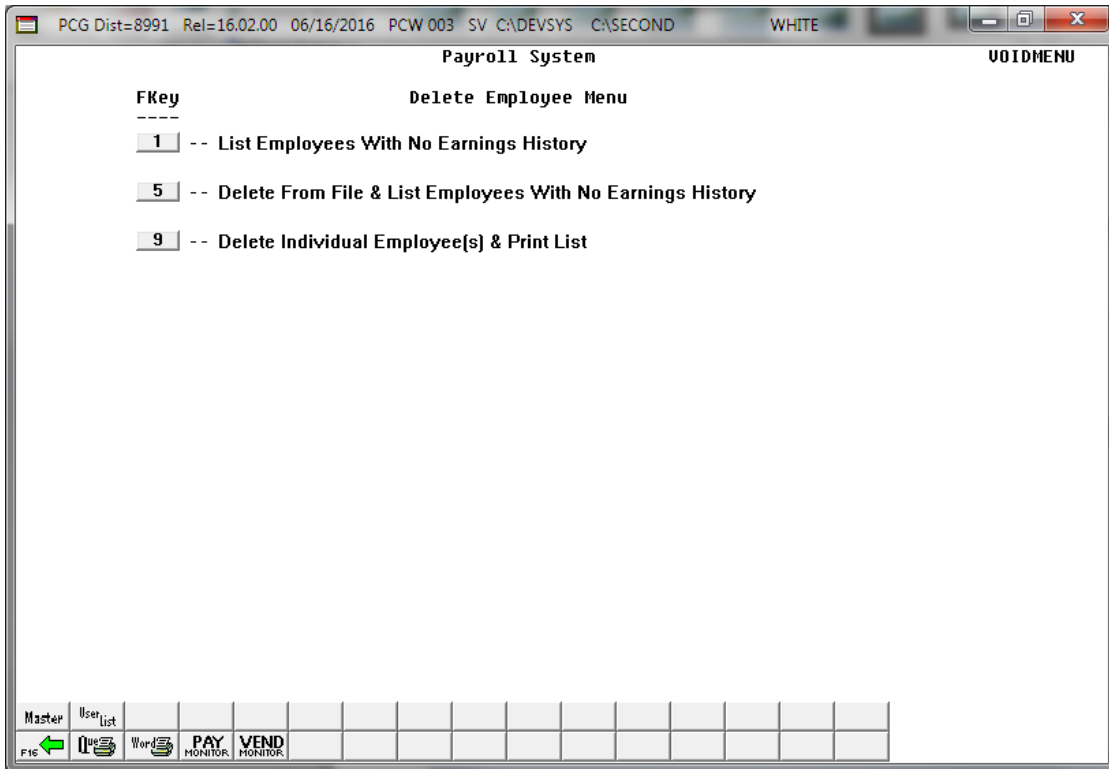The following screen displays:

Step	Action
3	Select **5** (**F5** - Delete from File & List Employees with No Earnings History).

The following screen displays:
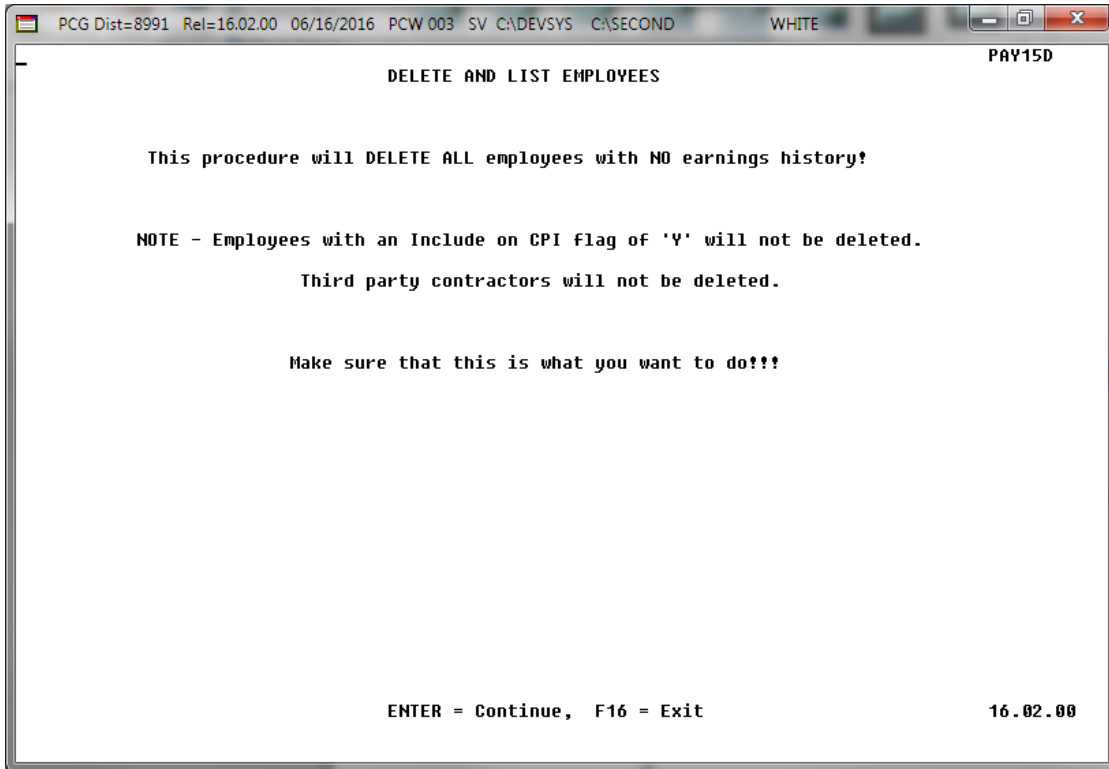
Step	Action
4	Review the information on the *Delete Employee Records without Earnings History from the Payroll Master File Warning* screen, and select **Enter** (Continue). *"Processing Request" briefly displays.*

The following screen displays:

Step	Action
5	**To print the report via the Uqueue Print Manager:** Select ![Uqueue icon] (**Uqueue**). **To print the report via Microsoft® Word:** Select ![Word icon] (**MS WORD**). Where appropriate, follow the instructions provided in the *Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature.
6	Select ![F16 icon] (**F16** - Exit) to return to the *Payroll System Master Menu,* or select ![Master icon] (**Master**) to return to the *Business Applications Master Menu.*

D1. Multiple Employee Records with No Earnings History/Removed from Payroll Master File Report – Example

```
REPORT DATE:  06/16/2016                EMPLOYEES WITH NO EARNINGS HISTORY                          PAGE  69
                                      ** REMOVED FROM PAYROLL MASTER FILE **

          EMPNO    EMPLOYEE NAME                    STATUS    SOC SEC NO    LOC    CLASS

          89057    WI8DHAM, RI8HIE                     I      899-18-9057   6790    03
                   1954 MAIN STREET
                   SMITH, GA              33333

          87672    WI9KER, EL9IS                       I      899-18-7672   6790    16
                   3368 MAIN STREET
                   SMITH, GA              33333

          88872    WI9KER, JA9QUETTA                   I      899-18-8872   3052    18
                   2141 MAIN STREET
                   SMITH, GA              33333

          89719    WO2THINGTON, JU2ENE                 I      899-18-9719   6790    03
                   1282 MAIN STREET
                   SMITH, GA              33333

          88653    WO4DALL, MA4NARD                    I      899-18-8653   2052    01
                   2366 MAIN STREET
                   SMITH, GA              33333

          89102    WR3N, LO3SE                         I      899-18-9102   6790    03
                   1908 MAIN STREET
                   SMITH, GA              33333

          89720    ZE9EDA, LO9D                        I      899-18-9720   6790    03
                   1281 MAIN STREET
                   SMITH, GA              33333


          *** TOTAL EMPLOYEES DELETED FROM FILE    898 ***
```