PCGENESIS CERTIFIED/CLASSIFIED PERSONNEL INFORMATION (CPI) SYSTEM OPERATIONS GUIDE

2/2/2018

Section C: Third Party Processing, V2.4

Revision History

Date	Version	Description	Author
2/2/2018	2.4	18.01.00 – Update menu screenshots.	D. Ochala
06/03/2016	2.3	16.01.00 – Update Logo and Footers.	S. Scrivens
04/25/2013	2.2	13.01.00 – Add cell phone, background-check date, and e-mail address fields to *3rd Party Contractor* screen.	D. Ochala
11/30/2009	2.1	09.03.01 – Update *Overview* to clarify setting up 3rd Party Contractor *Class Code*.	D. Ochala
03/30/2009	2.0	09.01.00 – New procedure for processing third party contractor employees.	C. W. Jones

Table of Contents

Overview

PCGenesis allows local school districts and systems to process third party contractor information via the Certified/Classified Personnel Information (CPI) module. PCGenesis users may create, display, update, delete this information, and print a listing of third party contractor information.

Third party contractors have been added to the PAYROLL file so that these individuals can be processed in CPI. On the Payroll *Description File*, a new **Class Type** code has been added when defining payroll classes. A payroll **Class Type** of '**3**' is now available for third party contractors. Refer to *Section F: Description/Deduction/Annuity File Processing* for the instructions to create the description codes.

The Payroll *Description File* **Class Type** may have the following valid values:

- F – Full Time
- P – Part Time
- S – Substitutes
- **3 – Third Party Contractors**

Third party contractors must be in a class defined with a **Class Type** of '**3**'. Even though third party contractors are defined in the PAYROLL file, these individuals may not be accessed from any payroll process. For example, a type '**3**' class code cannot be selected when setting up payroll, and third party contractors cannot be accessed from any payroll data entry screen.

A new option is available on the CPI menu for *Display/Update Third Party Contractors*. This option allows the user to maintain third party contractors for CPI. Third party contractors can be added, updated, or deleted from within this CPI module. Third party contractors must be in a class defined with a **Class Type** of '**3**'. Also, a list of third party contractors can be printed by selecting the print icon [F3🖨] from the main screen.

When a third party contractor is added, the '*Include on CPI?*' option is automatically defaulted to '**Y**' so that a CPI record is created for the contractor. Contractors are required to report demographic 'A' records with the *Employee Type* field set to 'P' on the CPI transmission file. Employees flagged as 'P', for third party contract employees, will be required to report both the Demographic 'A', and the Assignment 'C' records. No salary information is reported to CPI for third party contractors, so the Salary 'B' records are NOT produced for *Employee Type* 'P' employees on the CPI transmission file.

Third party contractors can be hired as employees in PCGenesis. To hire a third party contractor as an employee, the user can access *Add A New Employee* in payroll. Once the employee number for the contractor is entered, the user can change the individual's **Class Code** to a payroll class and the contractor will be "hired".
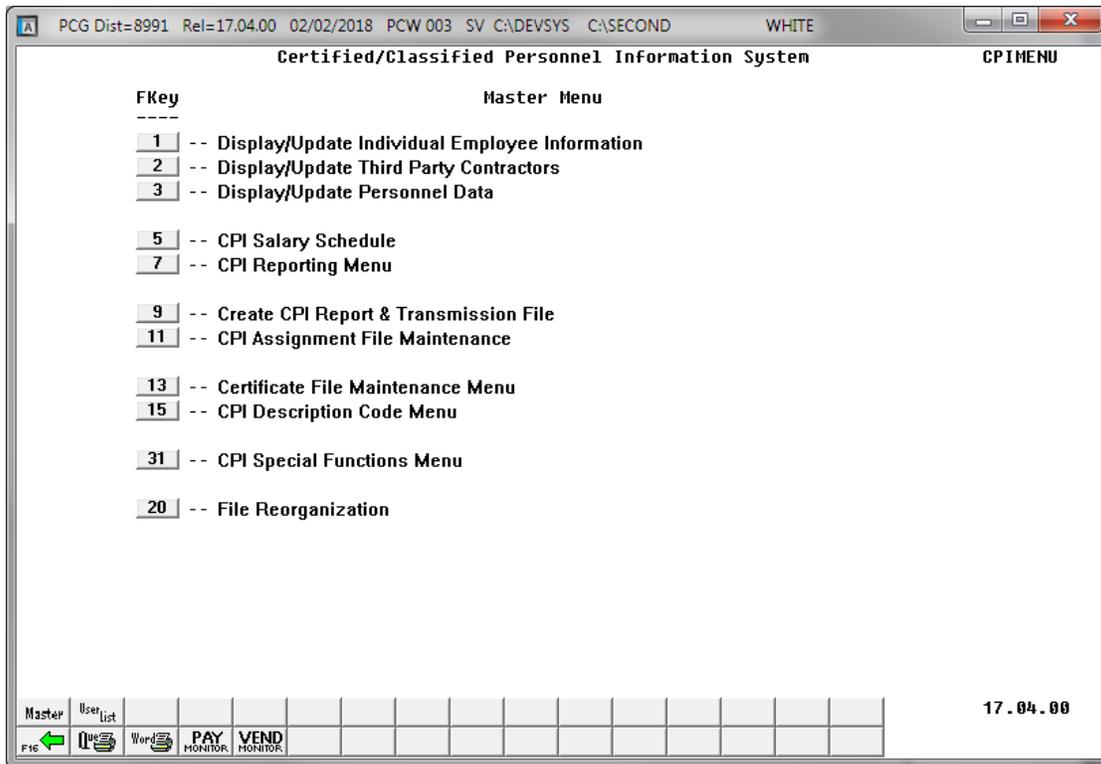
Screen Print: The screen print feature allows the user to obtain a screen print of selected payroll screens. The screen print feature is available on display/inquiry screens which have the [F3🖨] button. The screen print file will be available in the print queue with the name '*PSCNnnnn*'.

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

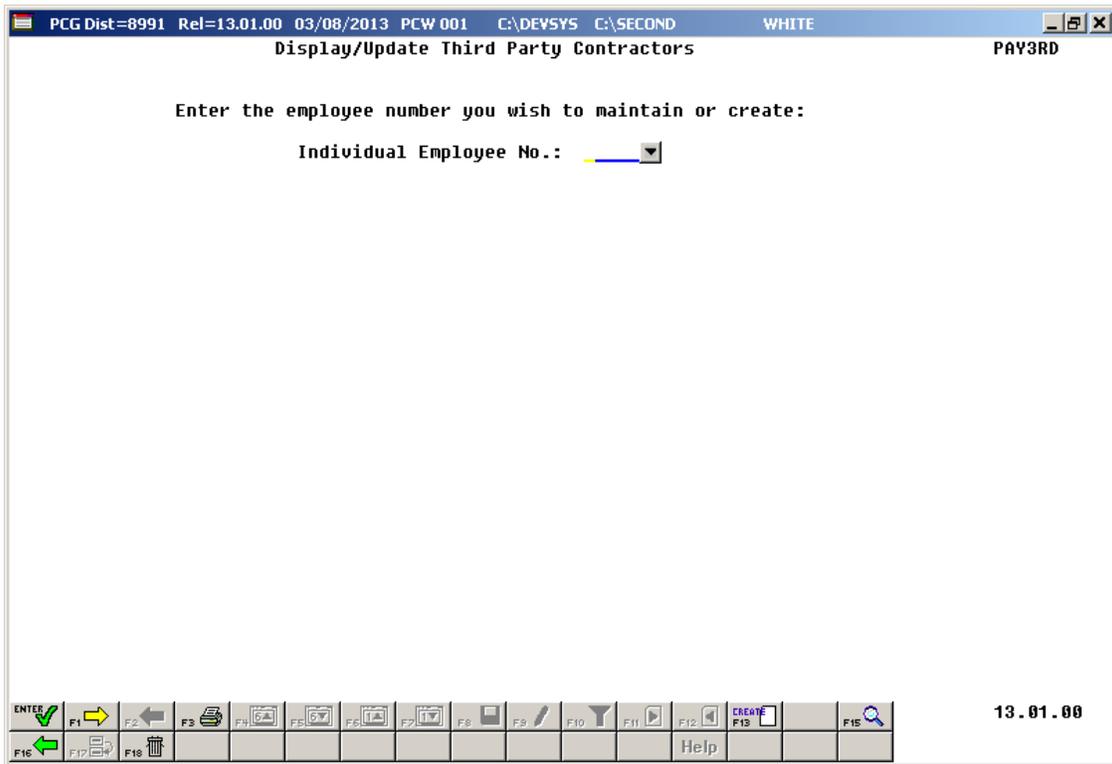# *Procedure A: Creating a Third Party Contractor Employee Record*

Step	Action
1	From the *Business Applications Master Menu*, select ⬚**4** (**F4** – Certified/Classified Personnel Information System).

The following screen displays:

Step	Action
2	Select ⬚**2** (**F2** – Display/Update Third Party Contractors).

The following screen displays:

Step	Action
3	Enter the third party contractor's employee number, or select the drop-down selection icon ▼ within the field to choose the employee's information.
4	Select ![CREATE F13] (**F13** – Create New Description Record).

The following screen displays:

Step	Action
5	PCGenesis automatically defaults to **A** (Active) in the **Status** field for all new employee entries.
6	The **Emp. no.** (Employee number) field's entry defaults from the *Step 3* entry.
7	Enter the location code or select the drop-down selection icon ▾ in the **Pay Loc** (Pay Location) field to choose the employee's payroll location.
8	Enter the third party contractor class code, or select the drop-down selection icon ▾ in the **Class** field to choose the pay class. *The Third Party Contractor class code must exist in the Description file, and must correspond to the Job field entry in Step 11. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions to create the certified and non-certified payroll class codes where appropriate.*
9	Enter **F** (Female) or **M** (Male) in the **Sex Code** field to choose the employee's gender.
10	Enter the location code or select the drop-down selection icon ▾ in the **Work Loc** (Work Location) to choose the employee's primary work location code.
11	Enter the code or select the drop-down selection icon ▾ in the **Job** field to choose the employee's job classification.

Step	Action
12	Enter **M** (Married) or **S** (Single) in the **Mar Stat** (Marital Status) field.
13	Enter the employee's social security number in the **SSN** (Social Security Number) field. *If the employee's social security number is unknown at the time the employee's record is created, enter all nine's (999-99-9999) in the field <u>temporarily</u>. Enter the employee's <u>actual</u> social security number in the SSN (Social Security Number) field <u>before</u> W2 calendar year-end processing however. PCGenesis automatically updates this information for the employee's earnings history information.*
14	Enter the employee's first, and middle name or middle initial, up to fifteen (15) characters each in the **(NAME) First** and **(NAME) Middle** fields. *The First name is a required field. The Middle name or initial is an optional field.*
15	Enter the employee's professional title in the **(NAME) Prefix** field. *PCGenesis uses this field in this module for such processes as contract processing. An example of an entry would include Dr. (Doctor).*
16	Enter the employee's last name, up to fifteen (15) characters in the **(NAME) Last** field. *The Last name field is a required field.*
17	Enter the suffix for the employee's name in the **Suffix** field. *Examples of this entry include Sr. (Senior) or Jr. (Junior).*
18	Enter the employee's street/mailing address, up to thirty (30) characters per field, in the **Address** and **Address L2** fields.
19	Enter the employee's city in the first field, up to twenty-seven (27) characters, and the two-character state code in the second **City/State** field. *The comma (,) already exists to separate the two entries.*
20	Enter the employee's postal code, including the *Zip+4* postal codes where appropriate, in the **Zip code** field.
21	Enter the county of residence code in the **County** field. *Refer to the "Georgia County Code Listing" for a complete listing of Georgia counties and county codes.*
22	Enter the employee's telephone number including the area code (###-###-####) in the **Phone** field.
23	Enter the employee's cell phone number including the area code (###-###-####) in the **Cell Phone** field.
24	Enter the employee's date of birth (MM/DD/CCYY) in the **Birth Date** field.

Step	Action
25	Enter the employee's <u>initial</u> hire date (MM/DD/CCYY) in the **Hire Date** field.
26	Enter the date of the employee's last <u>background-check</u> (MM/DD/CCYY) in the **Background Ck** field, where appropriate.
27	Enter the employee's <u>rehire</u> date (MM/DD/CCYY) in the **Rehire Date** field, where appropriate.
28	Enter the employee's termination date (MM/DD/CCYY) in the **Term date** (Termination date) field, where appropriate.
29	Enter the termination code or select the drop-down selection icon ▼ in the **Term reason** (Termination reason) field to choose the termination reason where appropriate.
30	The **Certificate Type** field is not modifiable during the employee record creation procedure. Refer to *Section A: Displaying/Updating Individual Employee Information for the instructions to enter certificate information.*
31	Enter the employee's CPI job code in the **CS1 Job (from CPI)** field. *The GaDOE provides a complete listing of CPI job codes at http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes01.entry_form.*
32	Enter **Y** (Yes) or **N** (No) in the **Include on CPI?** field to identify the employee's inclusion in, or the exclusion from CPI reporting.
33	Enter the code or select the drop-down selection icon ▼ in the **Ethnic code** field to choose the employee's ethnicity. *If leaving the field blank, an E (Ethnicity) record containing all zeroes (0's) and the description of "Unspecified" must exist in the payroll Description File.*
34	Select the ○ (**Radio Button**) to left of the appropriate response in the **Hispanic/Latino Ethnicity?** field.
35	Select the ○ (**Radio Button**) to left of all of the responses which apply in the **Race (Select all that apply)** fields. *Select at least one response.*
36	Enter the employee's e-mail address in the **E-mail addr** field.
37	Select [ENTER ✓] (**Enter**). Select F3 🖨 (**F3** – Print this data) to obtain a screen print of the *Update/Display Third Party Contractors* screen. The screen print file will be available in the print queue with the name '*PSCNnnnn*'.

The following screen displays:

Although the screenshot example displays for a Non-Certified Third Party Contract employee, the procedure applies to Certified employees as well.

Step	Action
38	Verify *"Record Validated Successfully – F8 to Save."* displays, and select ⬜ (**F8** – Save Changes).

The following screen displays:
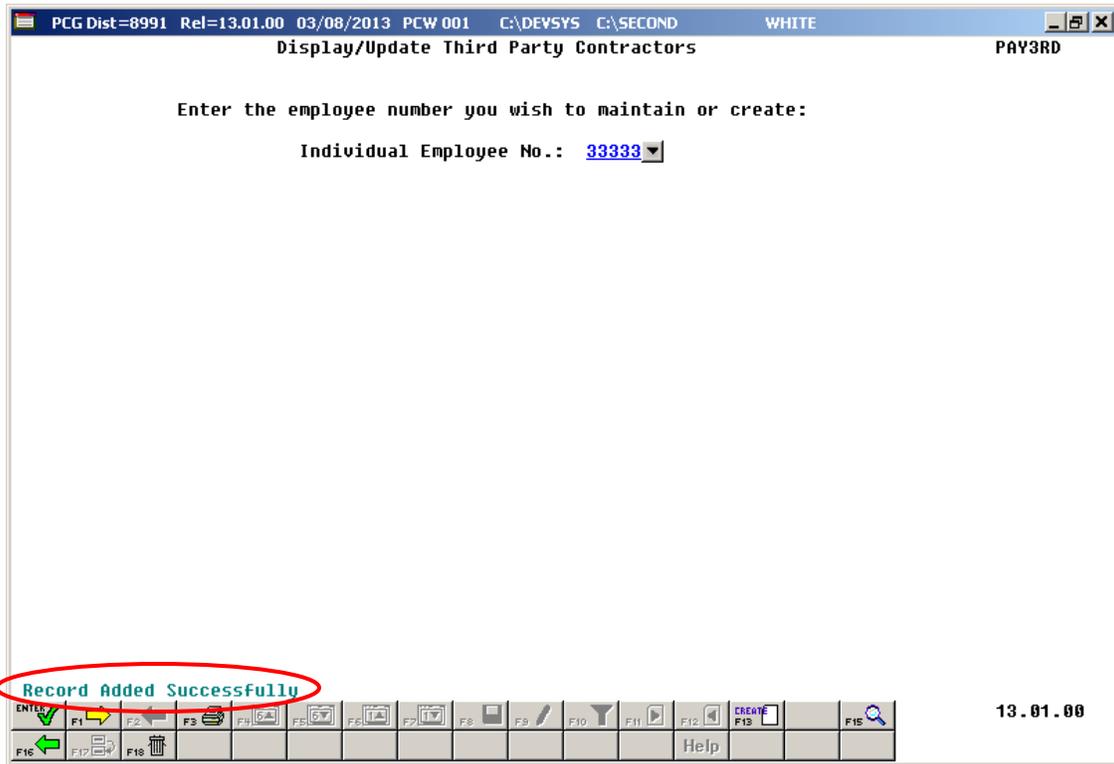
Step	Action
39	Verify *"Record Added Successfully"* displays, and select F16 (**F16** - Exit) to return to the *Certified/Classified Personnel System Master Menu*.

The following screen displays:

Step	Action
40	Select (**F16** - Exit) or select (**Master**) to return to the *Business Applications Master Menu.*

Procedure B: Displaying and Updating a Third Party Contractor Employee Record

Step	Action
1	From the *Business Applications Master Menu*, select ___4___ (**F4** – Certified/Classified Personnel Information System).

The following screen displays:

Step	Action
2	Select ___2___ (**F2** – Display/Update Third Party Contractors).

The following screen displays:

Step	Action
3	Enter the third party contractor's employee number, or select the drop-down selection icon ▼ within the field to choose the employee's information.
4	Select ✔ (**Enter**).

The following screen displays:

Step	Action
5	**For record modifications:** Make the appropriate modifications and select (**Enter** – Validate), and proceed to *Step 6*.
	For record displays: Select (**F16** - Exit), and proceed to *Step 8*.
	Select (**F3** – Print this data) to obtain a screen print of the *Update/Display Third Party Contractors* screen. The screen print file will be available in the print queue with the name '*PSCNnnnn*'.

The following screen displays:

Step	Action
6	Verify *"Record Validated Successfully – F8 to Save"* displays, and select ⬛ (**F8** – Save Changes).

The following screen displays:

Step	Action
7	Verify *"Record Updated Successfully – F16 to Return"* displays, and select (**F16** - Exit) to return to the *Display/Update Third Party Contractors Entry/Selection* screen.

The following screen displays:

Step	Action
8	Select [F16] (**F16** - Exit) to return to the *Certified/Classified Personnel System Master Menu.*

The following screen displays:

```
 A   PCG Dist=8991  Rel=17.04.00  02/02/2018  PCW 003  SV  C:\DEVSYS  C:\SECOND          WHITE              _  □  ✕
                         Certified/Classified Personnel Information System                      CPIMENU

             FKey                               Master Menu
             ────
              1   -- Display/Update Individual Employee Information
              2   -- Display/Update Third Party Contractors
              3   -- Display/Update Personnel Data

              5   -- CPI Salary Schedule
              7   -- CPI Reporting Menu

              9   -- Create CPI Report & Transmission File
             11   -- CPI Assignment File Maintenance

             13   -- Certificate File Maintenance Menu
             15   -- CPI Description Code Menu

             31   -- CPI Special Functions Menu

             20   -- File Reorganization



                                                                                          17.04.00
    Master  User
            list
    F16    Que    Word    PAY     VEND
                        MONITOR. MONITOR.
```

Step	Action
9	Select [F16] (**F16** - Exit) or select [Master] (**Master**) to return to the *Business Applications Master Menu.*

Procedure C: Deleting a Third Party Contractor Employee Record

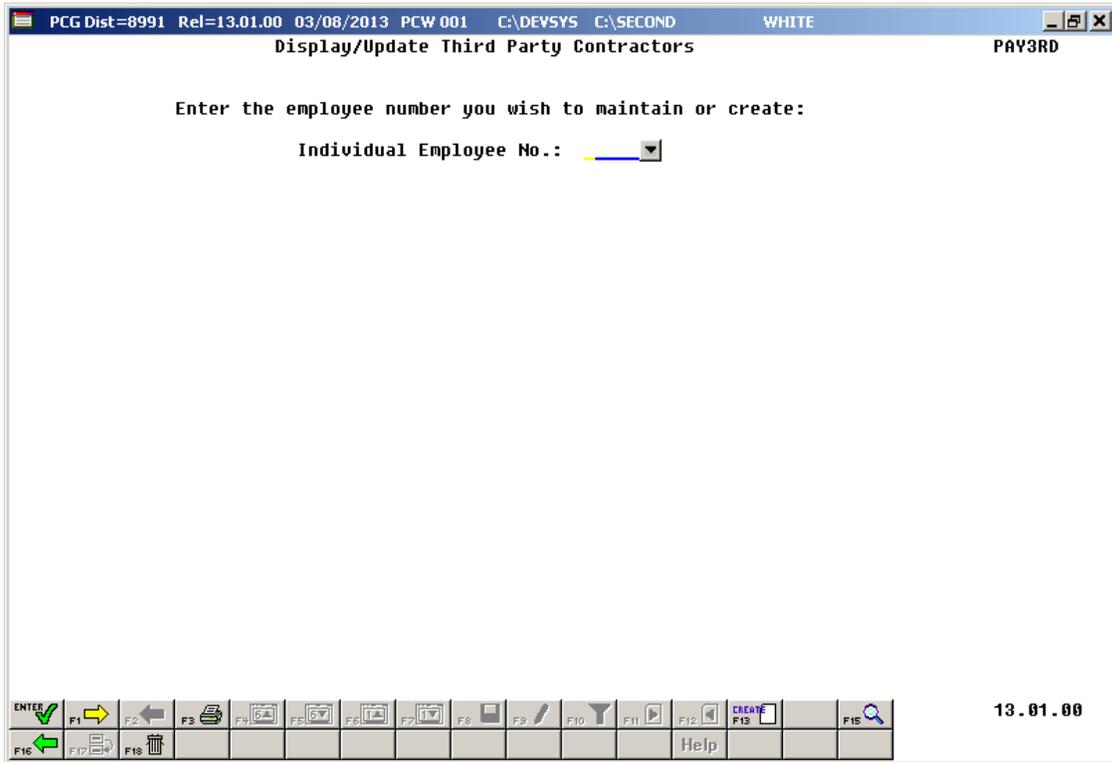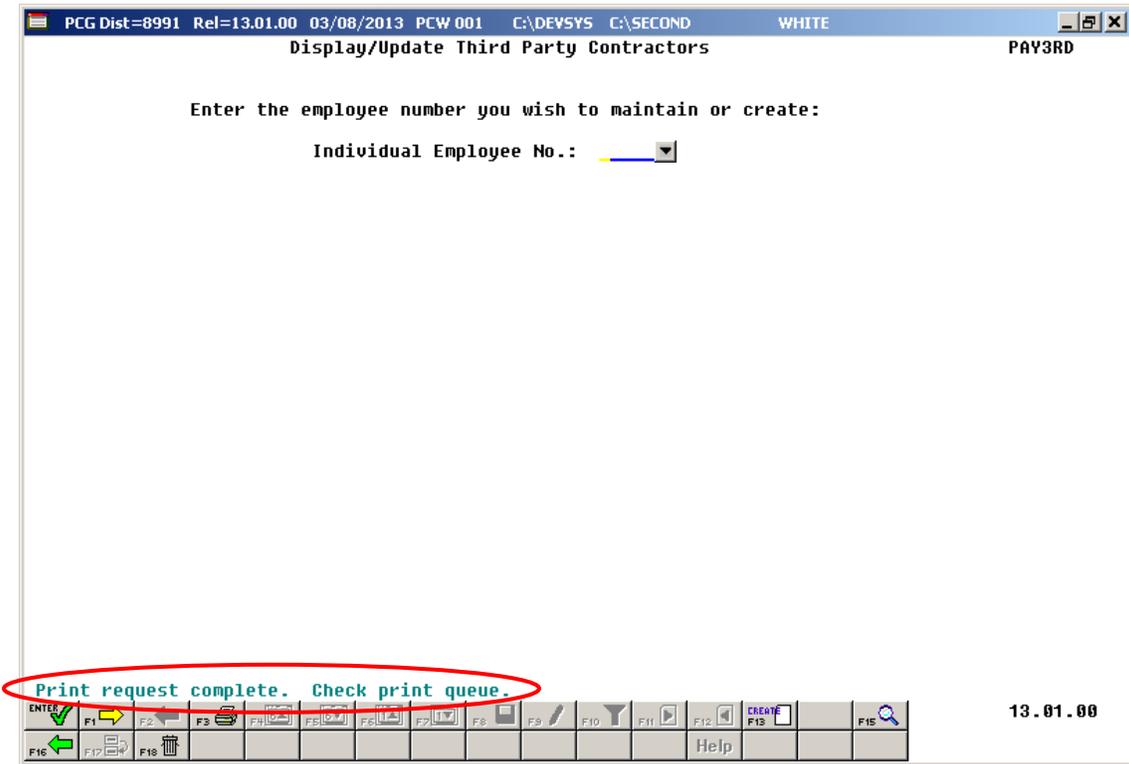| Step	Action
1	Repeat the steps provided in *Procedure B: Displaying/Updating a Third Party Contractor Employee Record* to change the employee's **Include on CPI?** flag to **N** (No).
2	From the *Business Applications Master Menu*, select ___4___ (**F4** – Certified/Classified Personnel Information System).

The following screen displays:

```
  A   PCG Dist=8991  Rel=17.04.00  02/02/2018  PCW 003  SV C:\DEVSYS  C:\SECOND        WHITE           ☐ ☐ ✖
                         Certified/Classified Personnel Information System                       CPIMENU
            FKey                            Master Menu
            ----
              1   --  Display/Update Individual Employee Information
              2   --  Display/Update Third Party Contractors
              3   --  Display/Update Personnel Data

              5   --  CPI Salary Schedule
              7   --  CPI Reporting Menu

              9   --  Create CPI Report & Transmission File
             11   --  CPI Assignment File Maintenance

             13   --  Certificate File Maintenance Menu
             15   --  CPI Description Code Menu

             31   --  CPI Special Functions Menu

             20   --  File Reorganization


                                                                                              17.04.00
  Master  User
          list
   F16   ☐   Word   PAY   VEND
                   MONITOR MONITOR
```

Step	Action
3	Select ___2___ (**F2** – Display/Update Third Party Contractors).

The following screen displays:

Step	Action
4	Enter the third party contractor's employee number, or select the drop-down selection icon ▼ within the field to choose the employee's information. *Select* F1➡ *(F1 – Next Description Record) and* F2⬅ *(F2 – Previous Description Record) to scan the third party contractor file for specific employee information where appropriate.*
5	Select F18 🗑 (**F18** – Delete Description Record).

The following screen displays:

Step	Action
6	Verify *"PF18 to Delete Record"* displays, and select F18 (**F18** – Confirm Delete). Select F3 (**F3** – Print this data) to obtain a screen print of the *Update/Display Third Party Contractors* screen. The screen print file will be available in the print queue with the name '*PSCNnnnn*'.

The following dialog box displays:

Step	Action
7	Select **Yes** (**Yes**). *When selecting 'NO', "Contractor not deleted" displays. Select F16 ← (F16 - Exit) to return to the Display/Update Third Party Contractors Entry/Selection screen, and proceed to Step 9.*

The following screen displays:
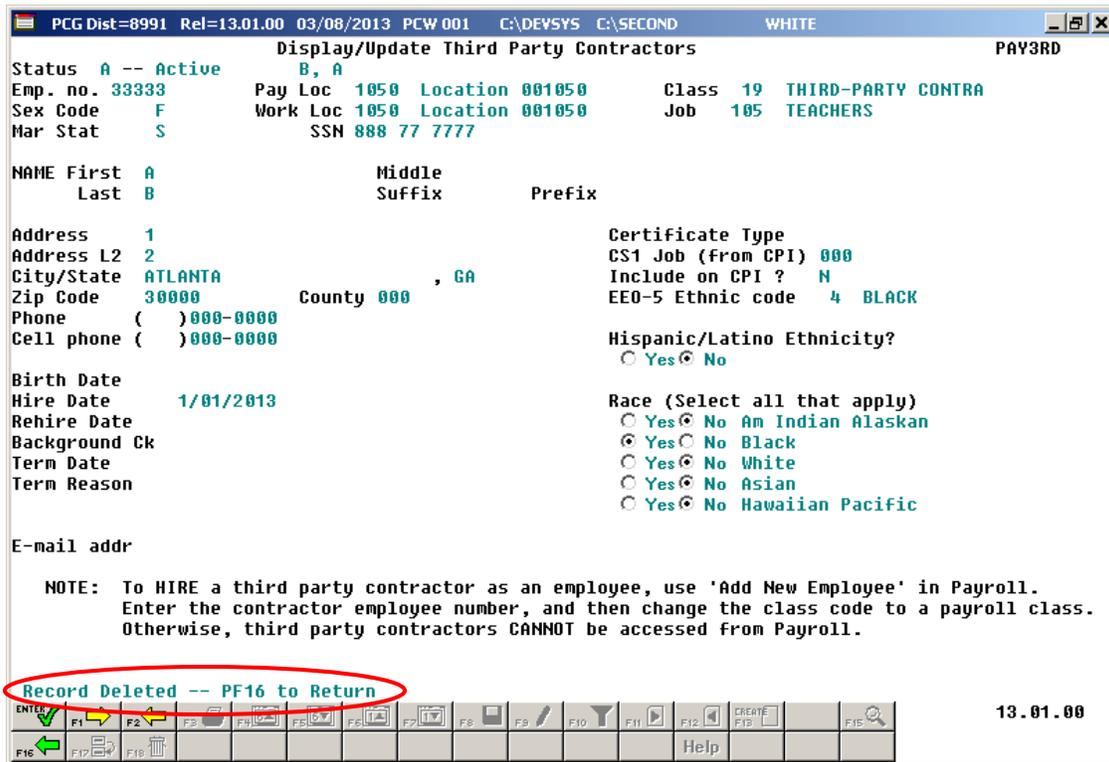
Step	Action
8	Verify *"Record Deleted -- F16 to Return"* displays, and select F16 ← (**F16** - Exit) to return to the *Display/Update Third Party Contractors Entry/Selection* screen.

The following screen displays:

Step	Action
9	Select F16 (**F16** - Exit) to return to the *Certified/Classified Personnel System Master Menu.*

The following screen displays:

Step	Action
10	Select (**F16** - Exit) or select (**Master**) to return to the *Business Applications Master Menu*.

Procedure D: Printing the CPI Third Party Contractor Listing

Step	Action
1	From the *Business Applications Master Menu*, select 4 (**F4** – Certified/Classified Personnel Information System).

The following screen displays:
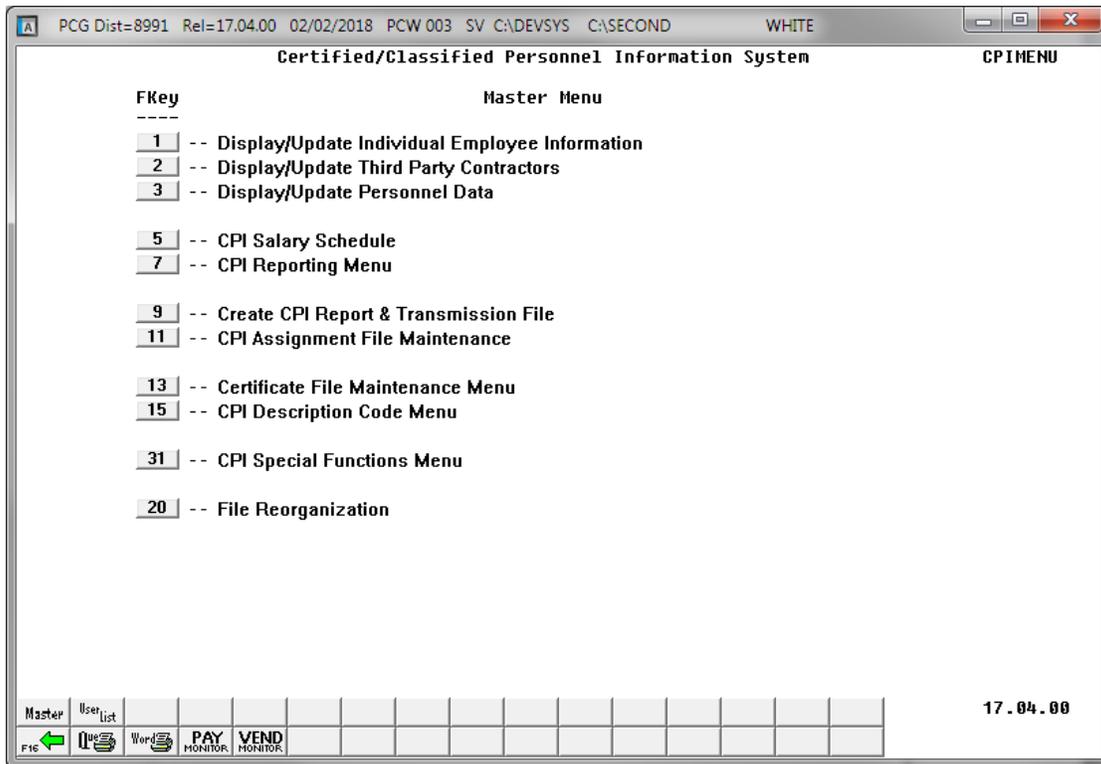
Step	Action
2	Select 2 (**F2** – Display/Update Third Party Contractors).

The following screen displays:

Step	Action
3	Select [F3 icon] (**F3** – Print this Data).

The following screen displays:

Step	Action
4	Verify *"Print request complete. Check print queue."* Displays, and select ![F16] (**F16** - Exit) to return to the *Certified/Classified Personnel System Master Menu*.

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**). 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 where appropriate.
6	Select [F16 icon] (**F16** - Exit) or select [Master icon] (**Master**) to return to the *Business Applications Master Menu.*

D1. CPI Third Party Contractor Listing – Example

```
REPORT DATE: 03/08/2013  14:51:04             CPI THIRD PARTY CONTRACTORS                          PAGE    1
   PROGRAM: PAY3RD

EMP #  SSN         NAME                   STAT CLASS                              BIRTH    ETHNIC  HISP  IND  BLK  WHT  ASN  PAC
                                          SEX  WORK LOCATION                      REHIRE   WRK DAYS  YRS EXP CERT BASIS  CLASS BAS
                                                                                 TERM DT   TERM REASON


88944  999-08-8944 AR9STEAD, TA9HINA      A  19   THIRD-PARTY CONTRACTOR-C  12/01/1970   02                          W
                                          F  8010 Location 008010                          0       2                        1.00

88730  999-08-8730 BE7GMAN, KR7S          T  18   THIRD-PARTY CONTRACTOR-NC  8/01/1988   02
                                          F  8010 Location 008010                          0       2                        1.00
                                                                                 2/01/2008  9 RESIGNATION

88670  999-08-8670 FR3END, BE3NARDO       A  18   THIRD-PARTY CONTRACTOR-NC 12/01/1953   02                          W
                                          F  6211 Location 006211                          0       0                        1.00

89378  999-08-9378 GA7LIN, GA7A           A  19   THIRD-PARTY CONTRACTOR-C   1/01/1981   02                          W
                                          F  8010 Location 008010                          0       2                        1.00

89538  999-08-9538 HA7MONS, DO7NETTA      T  18   THIRD-PARTY CONTRACTOR-NC 11/01/1968   02
                                          F  8010 Location 008010                          0       2                        1.00
                                                                                 1/01/2006  9 RESIGNATION

88503  999-08-8503 IV2, BI2LI             A  19   THIRD-PARTY CONTRACTOR-C   3/01/1975   02                          W
                                          F  8010 Location 008010                          0       2                        1.00

88354  999-08-8354 LA7DRUM, JA7EL         T  18   THIRD-PARTY CONTRACTOR-NC  7/01/1974   02
                                          F  8010 Location 008010                          0       2                        1.00
                                                                                 5/01/2002  9 RESIGNATION

22222  222-33-5656 SHEPARD, DEBRA         A  19   THIRD-PARTY CONTRACTOR-C                04                     B
                                          F  1050 Location 001050                          0       0         1.00
```

Appendix A: PCGenesis Automatic Record Creation

A1. Certificate File - Biographical Screen – Example

A2. Certificate File Maintenance Screen – Example

A3. Certificate File – Assignment Screen – Example

A4. Payroll System Screens – Example

A4.1. Add New Employee – Convert Third Party Contractor to Payroll Employee - Examples

Once the employee number for the contractor is entered, the user can change the individual's **Class Code** to a payroll class and the contractor will be "hired".

A4.2. Display/Update Personnel Data – Select Employee –Example