



# PCGENESIS PERSONNEL SYSTEM OPERATIONS GUIDE

12/22/2016

Section F: Personnel Update Processing,  
V1.4

## Revision History

| Date       | Version | Description   | Author    |
|------------|---------|---|-----------|
| 12/22/2016 | 1.4     | 16.04.00 – Update the <i>ACA Employee Data</i> screen with the ‘All 12 Mos’ field.                | D. Ochala |
| 06/14/2016 | 1.3     | 16.02.00 – Update the <i>ACA Dependent Data</i> delete dialog box.                                | D. Ochala |
| 02/04/2016 | 1.2     | 15.04.00 – Update the <i>ACA Dependent Data</i> screenshot.                                       | D. Ochala |
| 07/13/2015 | 1.1     | 15.02.00 – Add <i>Procedure C: ACA Employee Data</i> and <i>Procedure D: ACA Dependent Data</i> . | D. Ochala |
| 04/01/2013 | 1.0     | 13.01.00 – Create new document.   | D. Ochala |

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## Overview

The *Update/Display Personnel Data*, *Update/Display ACA Employee Data*, *Update/Display ACA Dependent Data*, *Update/Display Emergency Data* and *Update/Display Educational Data* items are available from the *Personnel System Update Menu*.

The *Update/Display Personnel Data* screen is also available from the *Payroll System – Payroll Update Menu*. Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information* for additional instructions.

Two ACA maintenance screens are available in PCGenesis on the *Personnel Update Menu*: *Update/Display ACA Employee Data* and *Update/Display ACA Dependent Data*. The purpose of these data entry screens is to facilitate producing IRS forms 1094-C and 1095-C for Affordable Healthcare reporting.

*Procedure C: ACA Employee Data* and *Procedure D: ACA Dependent Data* in this document provide detailed information about **IRS Form 1095-C** that is required starting in calendar year 2015. These forms will be produced at the same time as the W-2 forms, with a due date of January 31 of the reporting year. The forms and instructions can be found at [www.IRS.gov](http://www.IRS.gov). It is highly recommended that school district officials go to the IRS website and print and read the instructions for the 1094-C and the 1095-C.


The *Update/Display Emergency Data* screen allows the user to input next of kin information, emergency contact information, doctor information, comments, and the employee's e-mail address field.

The *Update/Display Educational Data* screen allows the user to input local and state years of teaching experience, as well as university and/or college degree information.

**GHI Change Code/GHI Change Date Fields:** The GHI change code and change date fields track employee updates which impact GHI processing. PCGenesis defaults the GHI change code to *MISC (Name, Address, Phone, etc.)* for updated employee information. PCGenesis automatically creates a 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

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.

**Screen Print:** The screen print feature allows the user to obtain a screen print of selected personnel screens. 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: Update/Display Personnel Data***

Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information* for instructions.

## Procedure C: ACA Employee Data

Two ACA maintenance screens are available in PCGenesis on the *Personnel Update Menu*: *Update/Display ACA Employee Data* and *Update/Display ACA Dependent Data*. The purpose of these data entry screens is to facilitate producing IRS forms 1094-C and 1095-C for Affordable Healthcare reporting.

Below is information which details the **Form 1095-C** that is required starting in calendar year 2015. These forms will be produced at the same time as the W-2 forms, with a due date of January 31 of the reporting year. The forms and instructions can be found at [www.IRS.gov](http://www.IRS.gov). It is highly recommended that school district officials go to the IRS website and print and read the instructions for the 1094-C and the 1095-C.

### Form 1095-C: Employer-Provided Health Insurance Offer and Coverage

- Form 1095-C is an employee statement.
- Form 1095-C answers the question of whether the employer met the *Penalty B* threshold as related to the Patient Protection and Affordable Care Act (ACA).
- Form 1095-C: Part II – Employee Offer and Coverage, example:

| Part II Employee Offer and Coverage  |               |     |     |     |     |     |      |      |     |      |     |     |     |
|--|---------------|-----|-----|-----|-----|-----|------|------|-----|------|-----|-----|-----|
|  | All 12 Months | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec |
| 14 Offer of Coverage (enter required code)   |               |     |     |     |     |     |      |      |     |      |     |     |     |
| 15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage | \$            | \$  | \$  | \$  | \$  | \$  | \$   | \$   | \$  | \$   | \$  | \$  | \$  |
| 16 Applicable Section 4980H Safe Harbor (enter code, if applicable)                    |               |     |     |     |     |     |      |      |     |      |     |     |     |

The *Update/Display ACA Employee Data* screen allows entry of the employee data required for IRS form 1095-C. Payroll administrators have the ability to enter ACA data using the PCGenesis *Update/Display ACA Employee Data Screen* and the *Update/Display ACA Dependent Data Screen*, or have the ability to mass load the ACA data by importing from a spreadsheet. School district officials need to enter the correct ACA codes for **ALL** full-time employees as defined by the ACA legislation.

For additional information about the ACA processes supported by PCGenesis, refer to the *Payroll System Operations Guide, Section D: Monthly/Quarterly/Annual/ Fiscal Report Processing, Topic 4: Processing Annual Reports – 1095-C Statement Processing*.

**Full-time employees must be manually coded by the payroll administrator in the line items regarding health coverage.** The data must be entered manually on the *Update/Display ACA Employee Data* screen. It will be the sole responsibility of the LUA officials to determine which individuals are considered full time employees and the correct codes for those full time employees as related to health insurance offers and coverage. The **1095-C Eligible** field on the *Update/Display ACA Employee Data* screen indicates to the system whether the employee is considered full-time based upon IRS ACA regulations. A ‘Y’ (Yes) value in the **1095-C Eligible** field indicates that the employee is full-time for ACA and that system will print a 1095-C for the employee.

**The Employer Shared Responsibility Provisions under the Affordable Care Act** do include penalties related to failure to comply with the employer responsibilities. Detailed information is located at <http://www.irs.gov/Affordable-Care-Act/Employers/Questions-and-Answers-on-Employer-Shared-Responsibility-Provisions-Under-the-Affordable-Care-Act>.

### **PC Genesis and GaDOE Support**

It remains the school district's responsibility to determine the appropriate reporting for the **Forms 1094-C and 1095-C**. We encourage school district officials to begin the process of determining the codes by month for all full-time employees and/or contracted individuals. For PCGenesis users, all full-time employees must be manually coded by the payroll administrator in the line items regarding health coverage. It will be the sole responsibility of the LUA officials to determine which individuals are considered full time employees and the correct codes for those full time employees as related to health insurance offers and coverage.

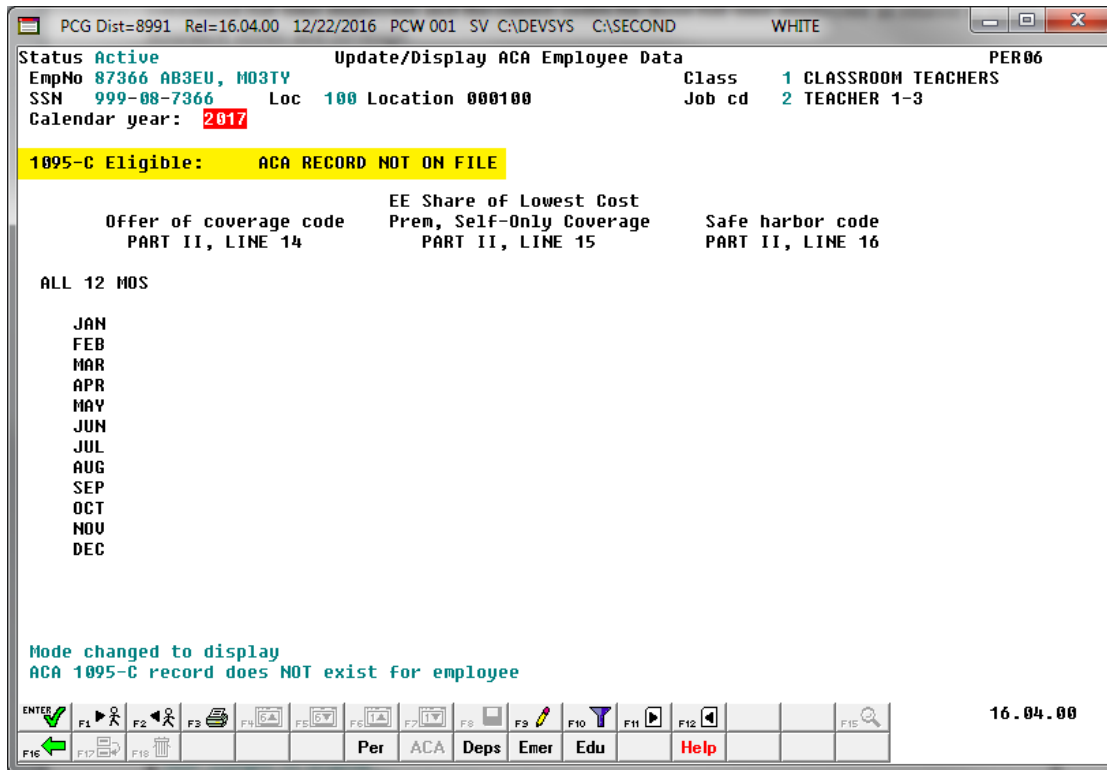
The PCGenesis Help Desk personnel will not be able to assist or advise the school districts as to the correct codes and options for individual employees when preparing these forms. Therefore, we strongly recommend that LUA personnel consult with their HR professionals and/or attorneys.



**The Update/Display ACA Employee Data Screen**

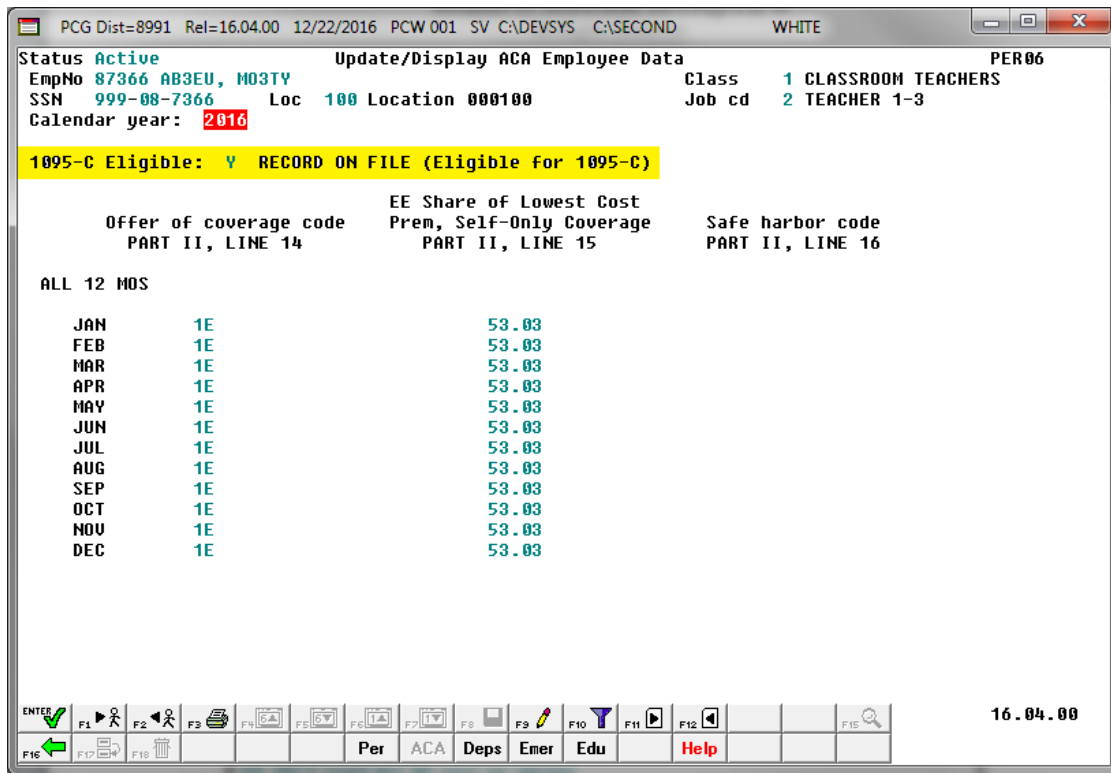
Careful attention should be paid to the information displayed on the *Update/Display ACA Employee Data* screen. The screen will clearly indicate whether or not an ACA record exists for the **Calendar Year** indicated on the screen, or if the ACA record does exist, whether the employee is ACA eligible or not.

In *Example 1*, an ACA record does not exist for the employee for the **Calendar Year** indicated on the screen and the message “ACA RECORD NOT ON FILE” is displayed.



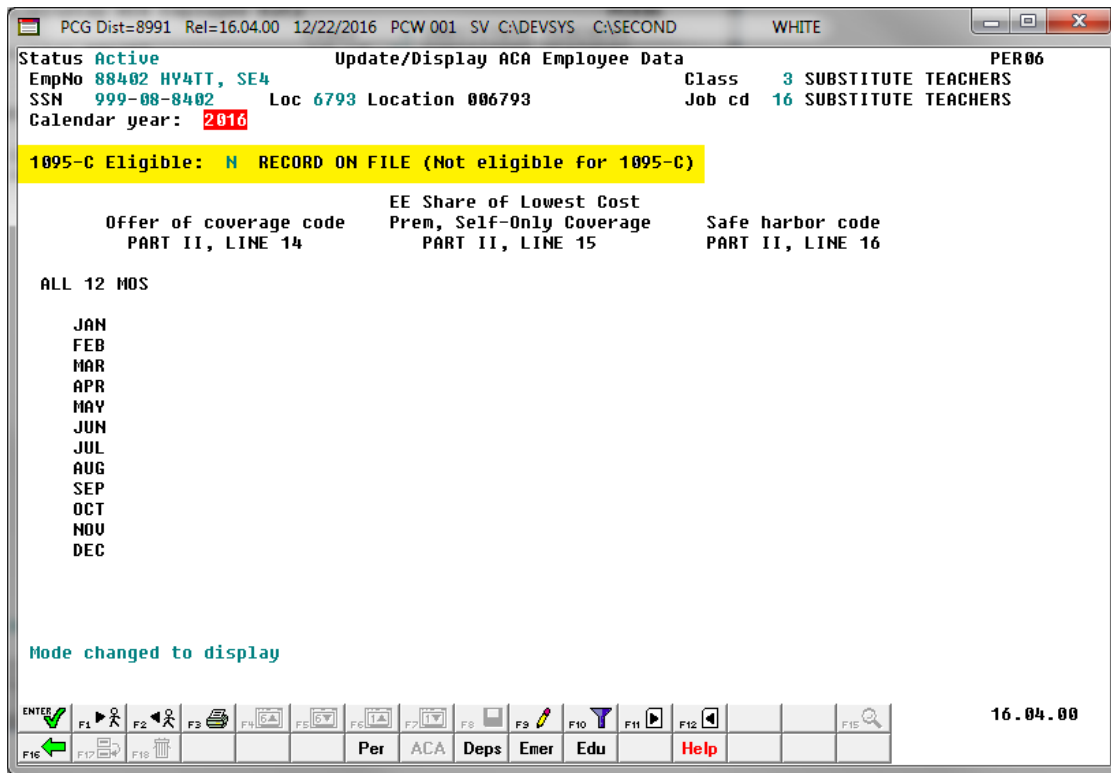
*Example 1 – ACA Record Not On File*

In *Example 2*, an ACA record does exist for the employee for the **Calendar Year** indicated on the screen and, because the **1095-C Eligible** switch is set to ‘Y’ (Yes), the message “*Record On File (Eligible for 1095-C)*” is displayed.



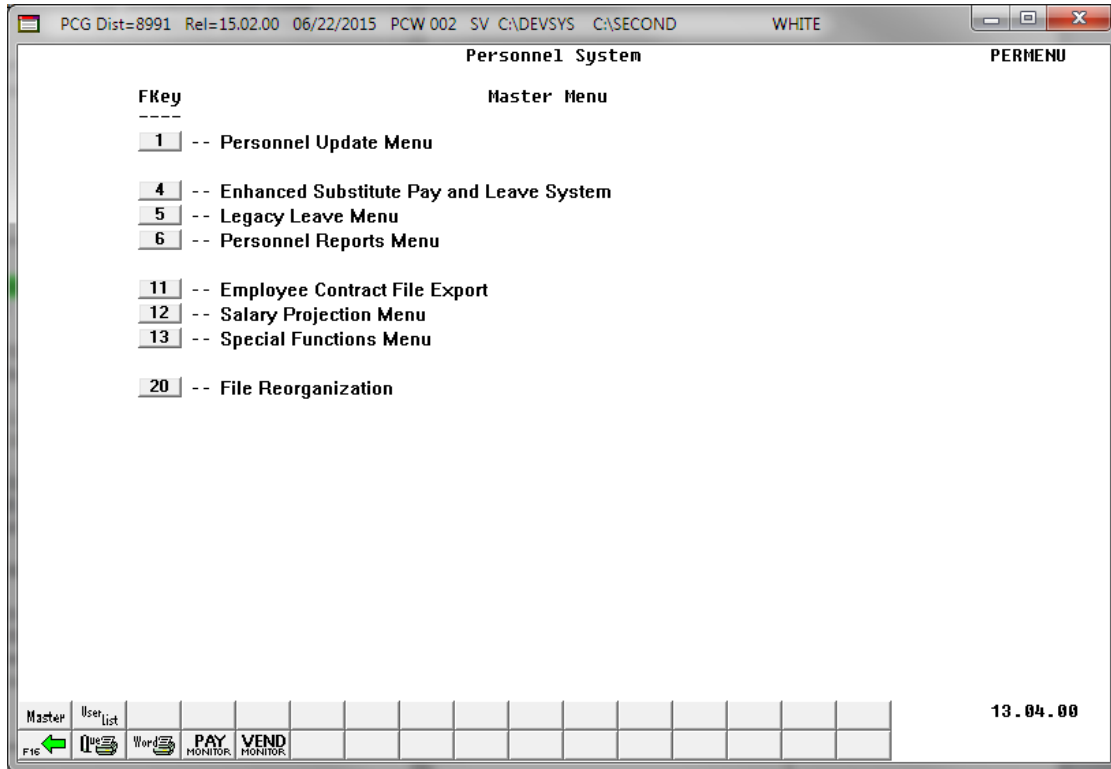
Example 2 – Record On File (Eligible for 1095-C)

In *Example 3*, an ACA record does exist for the employee for the **Calendar Year** indicated on the screen and, because the **1095-C Eligible** switch is set to ‘N’ (No), the message “*Record On File (Not Eligible for 1095-C)*” is displayed.



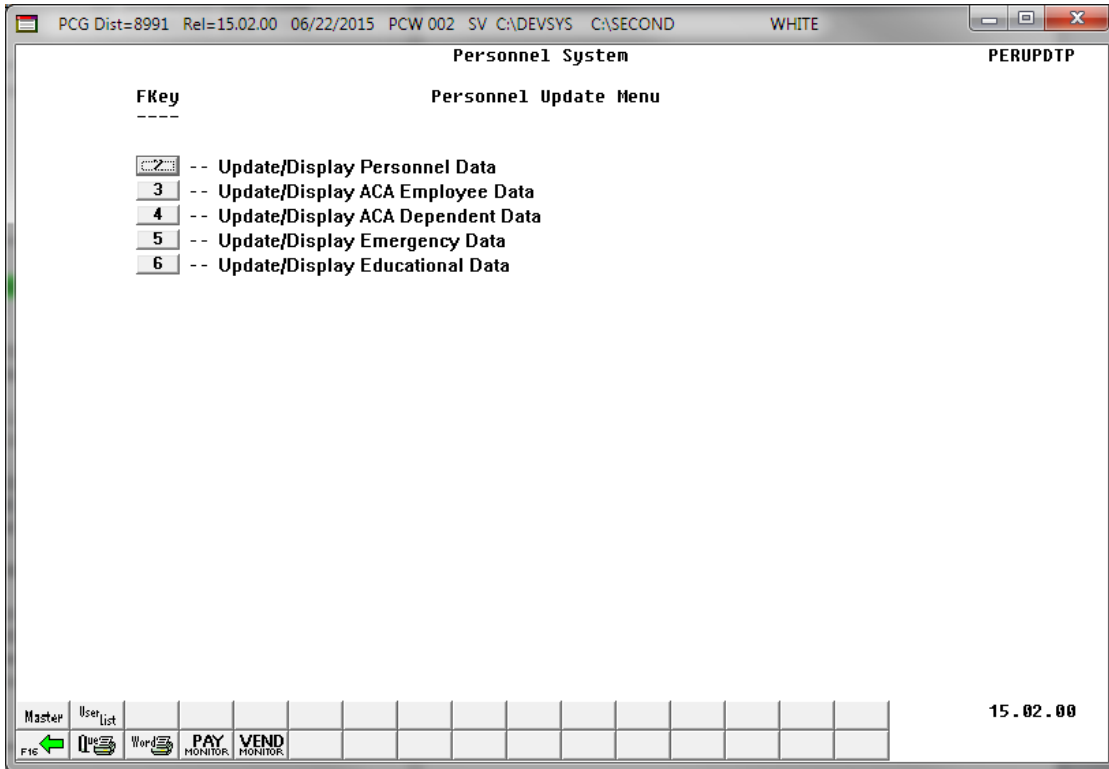
Example 3 – Record On File (Not Eligible for 1095-C)

## C1: Update/Display ACA Employee Data



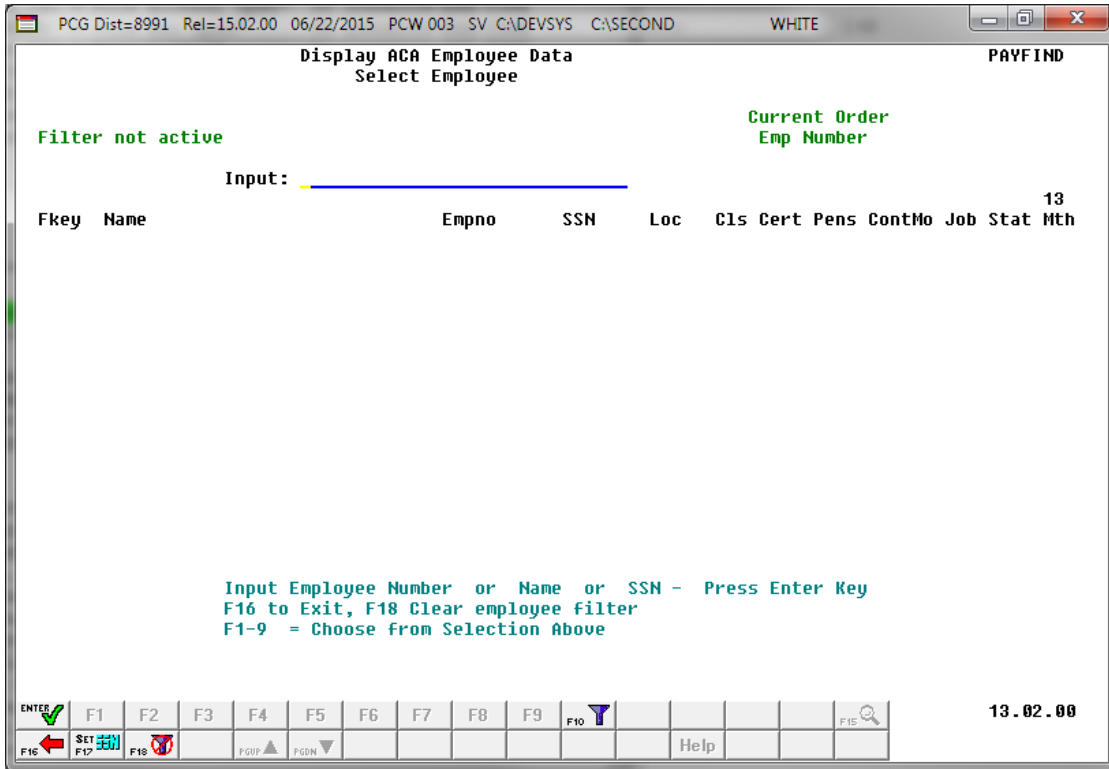
| Step | Action   |
|------|--|
| 1    | Select <b>F1</b> (F1 - Personnel Update Menu). |


The following screen displays:



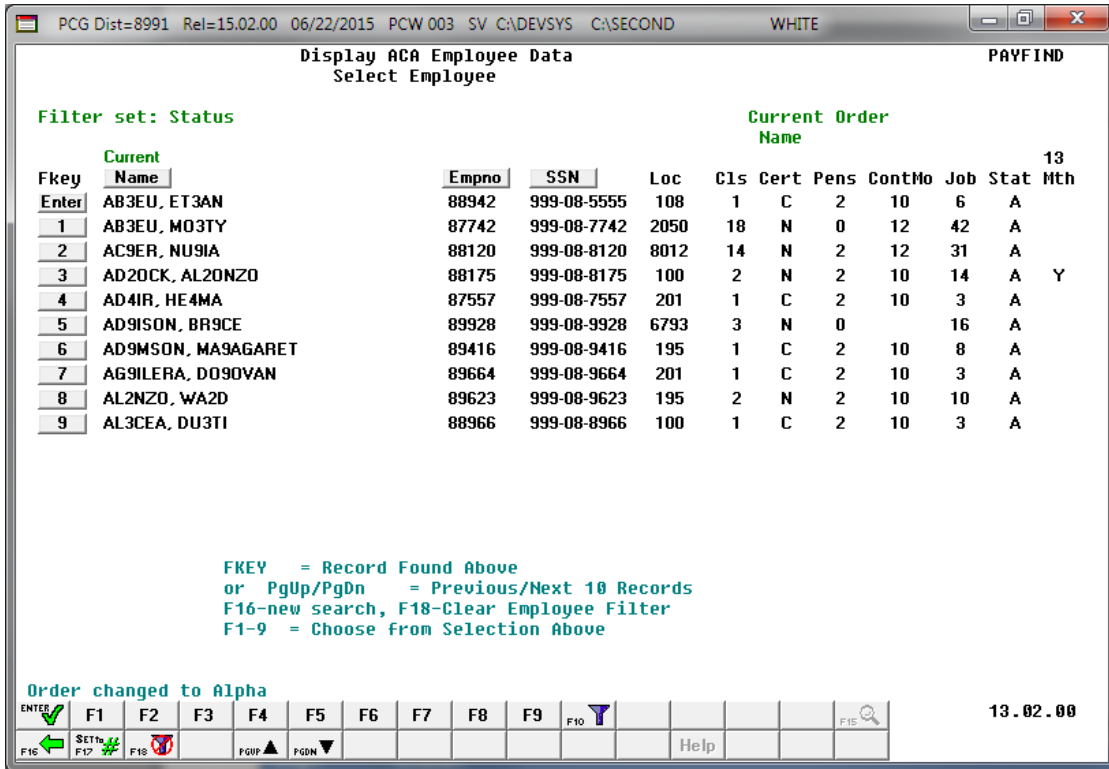
| Step | Action   |
|------|--|
| 2    | Select <b>3</b> (F3 - Update/Display ACA Employee Data). |




The following screen displays:



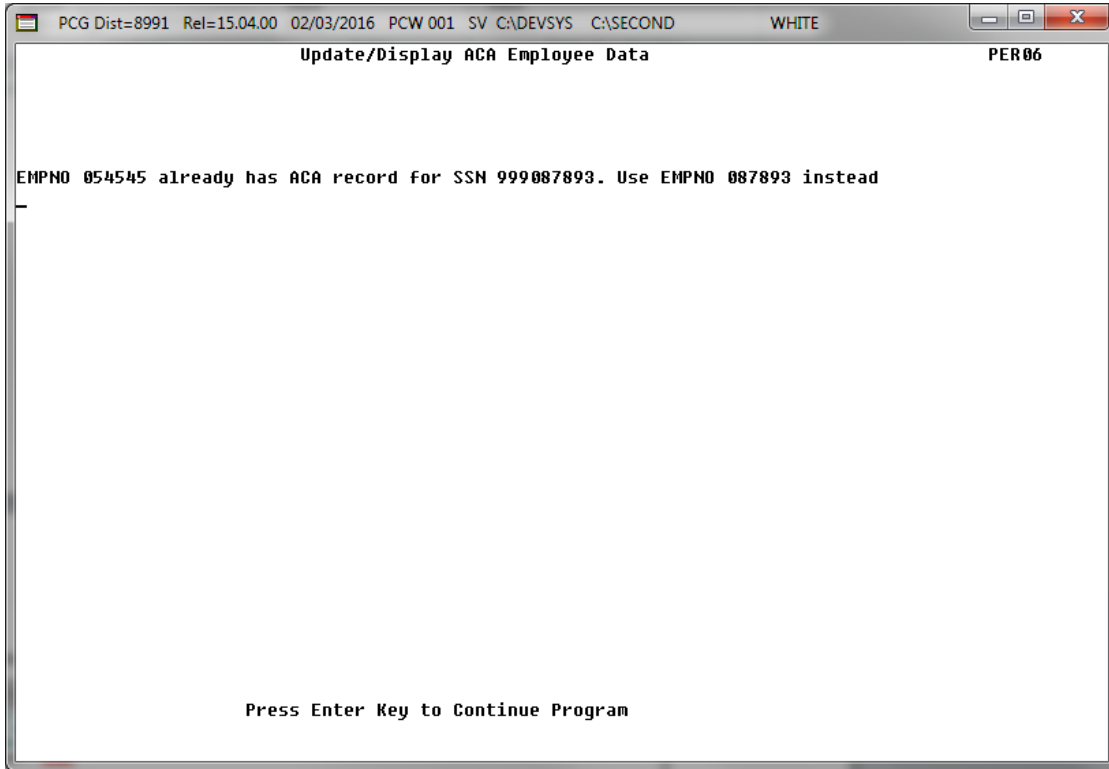
| Step | Action   |
|------|--|
| 3    | <p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 5</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and select <b>Enter</b>. 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> |

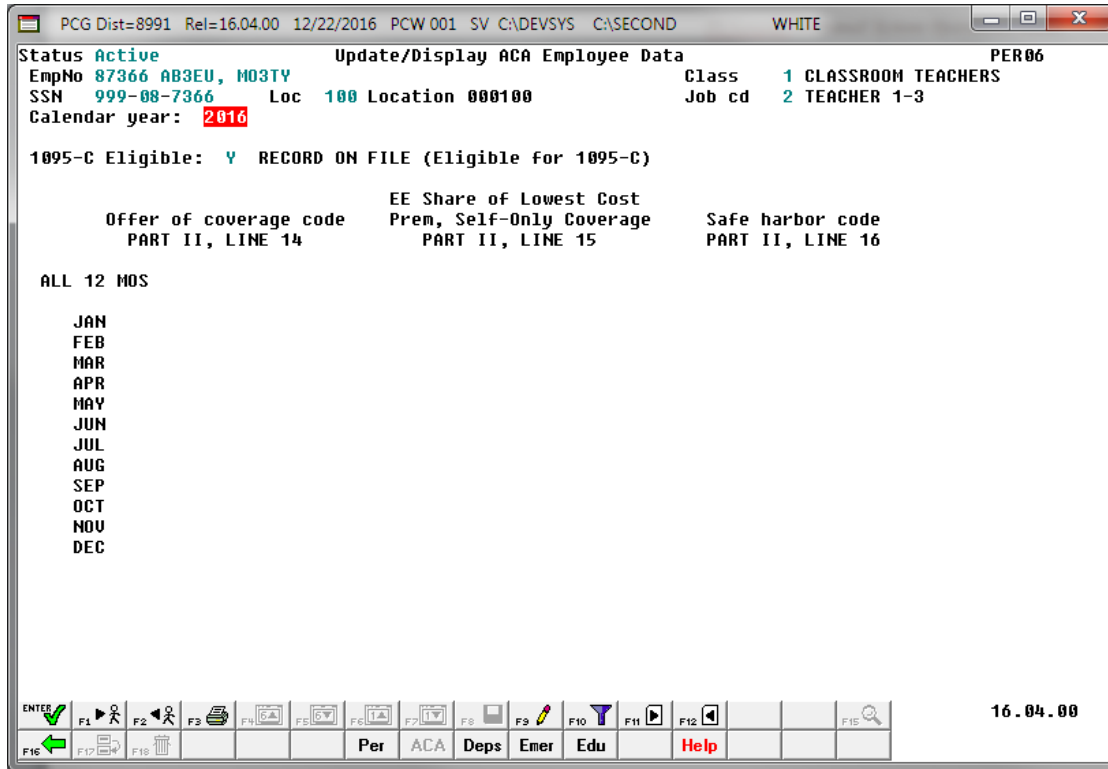
If an ACA record already exists for the employee’s Social Security Number, the following screen displays:




| Step | Action  |
|------|---|
| 5    | <p><u>When multiple employee ID numbers exist for the same Social Security Number:</u></p> <p>PCGenesis allows <u>one</u> employee ACA record to be created per Social Security Number. Therefore, if an employee ID number is entered and if an ACA record already exists for the employee’s Social Security Number, a screen will be displayed with the message, “EMPNO xxxxxx already has ACA record for SSN #####. Use EMPNO yyyyyy instead”. In this case, use the employee id number specified on the screen and return to Step 3.</p> <p>If the ACA data should be entered under the other employee ID number, the employee and dependent ACA data must first be deleted from the existing employee ID. To move the ACA data, go to the <i>Update/Display ACA Employee Data</i> screen and use <b>F18</b> to delete all of the employee’s ACA data for the Calendar Year. Then, create the employee and dependent ACA data using the preferred Employee ID number.</p> <p>To delete the existing ACA data, follow the procedures in section C2: <i>Delete ACA Employee Data</i>.</p> |

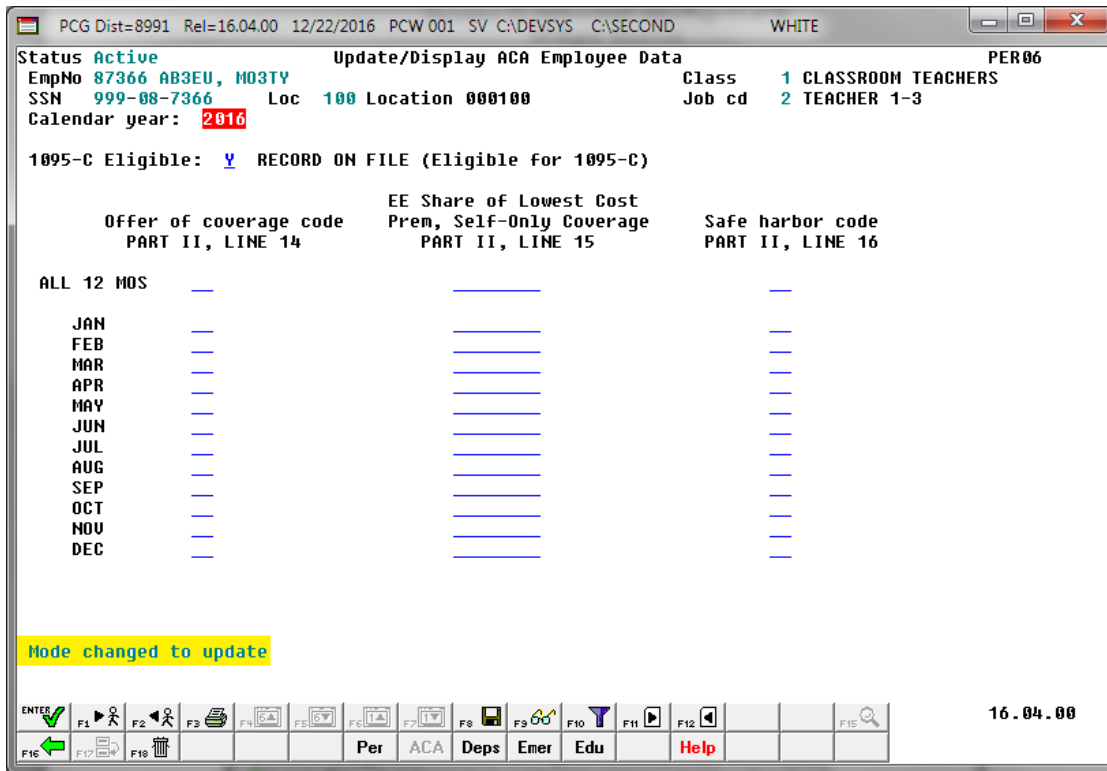




The following screen displays:









| Step | Action   |
|------|--|
| 6    | Select  (F9 – Switch to Update Mode). |

The following screen displays:

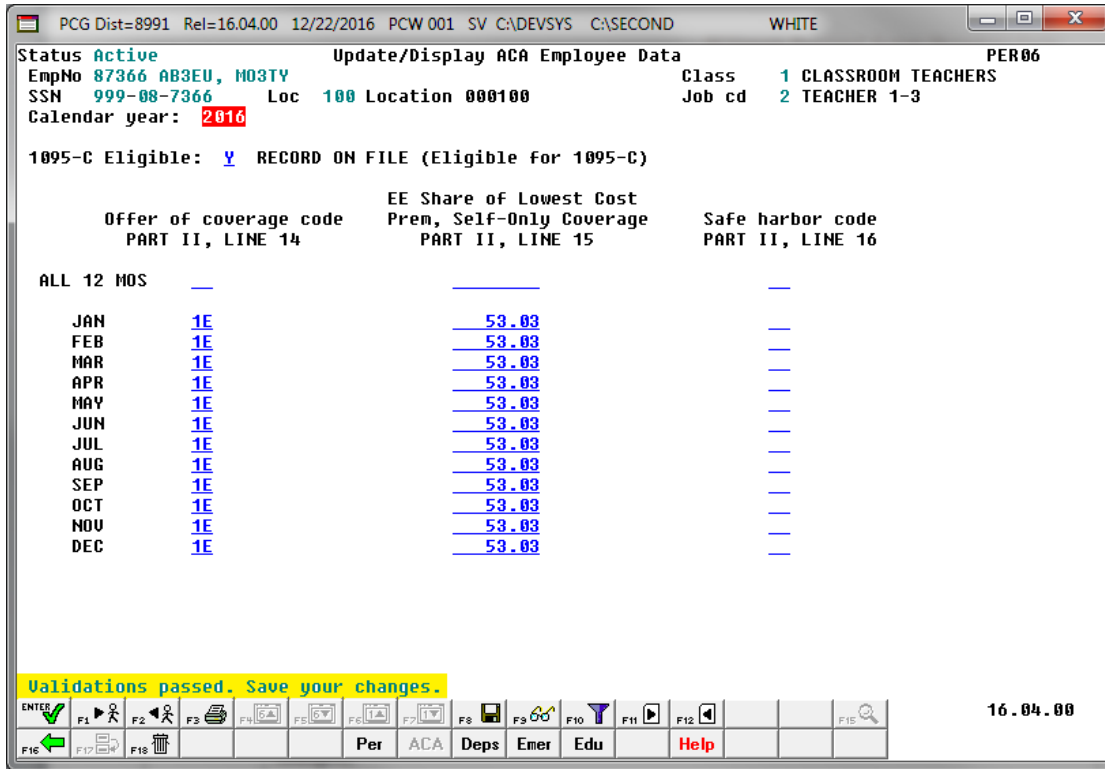



| Step | Action   |
|------|--|
| 7    | <p>Verify “Mode changed to update” displays.</p> <p><i>Although these instructions refer primarily to the entry of information, if the fields already contain information, or are automatically populated with information during the selection of a PF key, verify the fields’ entries are correct for the employee. If the information is incorrect, make the appropriate modifications to the field entries.</i></p>  |
| 8    | <p>Verify the <b>Calendar Year</b> field.</p> <p>The system defaults the <b>Calendar Year</b> field based upon the current date. If the current month is January through June, the <b>Calendar Year</b> field defaults to the current year minus one. If the current month is July through December, the <b>Calendar Year</b> field defaults to the current year.</p> <p>Select  (F11 – Go to next calendar year) to display the <i>ACA Employee Data</i> for the next calendar year. Select  (F12 – Go to previous calendar year) to display the <i>ACA Employee Data</i> for the previous calendar year.</p> |

| Step   | Action  |
|--|---|
| 9  | <p>Enter the <b>1095-C Eligible</b> field. The <b>1095-C Eligible</b> field on the <i>Update/Display ACA Employee Data</i> screen indicates to the system whether the employee is considered full-time based upon IRS ACA regulations.</p> <p>A ‘Y’ (Yes) value in the <b>1095-C Eligible</b> field indicates that the employee is considered full-time based upon IRS ACA regulations and therefore the system will print a 1095-C for the employee.</p> <p>A ‘N’ (No) value in the <b>1095-C Eligible</b> field indicates that the employee is <u>not</u> considered full-time based upon IRS ACA regulations and therefore that the system will <u>not</u> print a 1095-C for the employee.</p> <p>Valid values:</p> <p>Y – Print a 1095-C for the employee<br/>N – Do not print a 1095-C for the employee</p>   |
| 10   | <p>Data can be entered on the <i>Update/Display ACA Employee Data</i> screen by keying in data for <b>Offer of Coverage Codes</b>, <b>Employee Share of Lowest Cost Premium</b> fields, and the <b>Safe Harbor Codes</b> by either of the following methods:</p> <ul style="list-style-type: none"> <li>• <b>ALL 12 MOS</b> (All 12 months) – Enter the data <u>once</u> in the <b>ALL 12 MOS</b> row and select  (ENTER) to populate the <b>JAN</b> through <b>DEC</b> (January through December) rows with the same value.</li> </ul> <p style="text-align: center;">-- OR --</p> <ul style="list-style-type: none"> <li>• Enter data for each month <b>JAN</b> through <b>DEC</b> (January through December) rows individually.</li> </ul> <p>The data may be entered in <u>either</u> the <b>ALL 12 MOS</b> (All 12 months) row or the <b>JAN</b> through <b>DEC</b> rows, but not both.</p> <p>If the <b>JAN</b> through <b>DEC</b> rows are already populated and the user would like to use the <b>ALL 12 MOS</b> row to populate the months with different values, the individual <b>JAN</b> through <b>DEC</b> rows must be cleared first. Then, the user can enter the data <u>once</u> in the <b>ALL 12 MOS</b> row and select  (ENTER) to populate the <b>JAN</b> through <b>DEC</b> (January through December) rows with the same value.</p> |
| <p>Complete <i>Steps 11 - 13</i> by entering data in <u>either</u> the <b>ALL 12 MOS</b> (All 12 months) row or the <b>JAN</b> through <b>DEC</b> (January through December) rows, but not both.</p> |   |
| 11   | <p>Enter the code or select the drop-down selection icon  in the <b>Offer of Coverage Code</b> field to choose the employee’s correct offer of coverage code based upon IRS regulations. Enter the <b>Offer of Coverage Code</b> for all 12 months.</p> <p>The <b>Offer of Coverage</b> fields print on the employee’s 1095-C form in Part II, Line 14 for each of the 12 months of the calendar year. Review IRS regulations for determining the correct codes for the employee.</p>  |

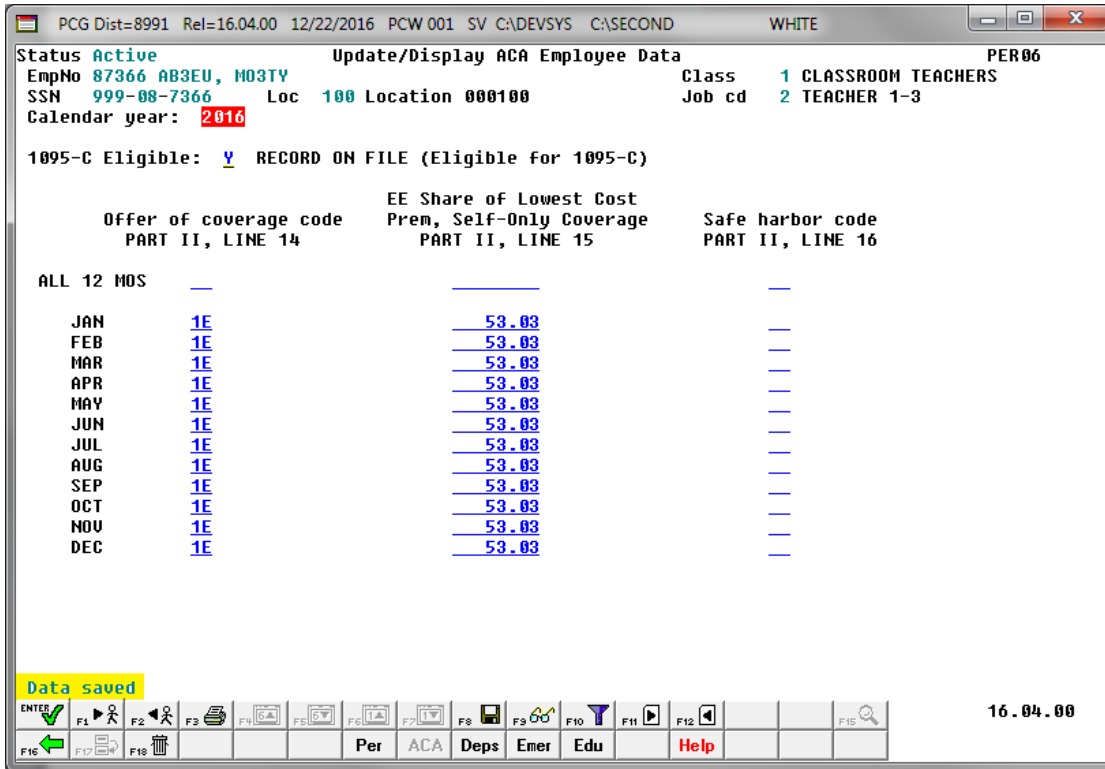
| Step | Action  |
|------|---|
| 12   | <p>Enter the <b>EE Share of Lowest Cost Prem, Self-Only Coverage</b> fields.</p> <p>The <b>EE Share of Lowest Cost Prem, Self-Only Coverage</b> fields print on the employee's 1095-C in Part II, Line 15 for each of the 12 months of the calendar year, if applicable.</p> <p>Enter line 15 only if the coverage offered to the employee provided minimum value and code <b>1B</b>, <b>1C</b>, <b>1D</b>, or <b>1E</b> is entered for the <b>Offer of Coverage Code</b>. Enter the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee. Enter the amount including any cents. If the employee is not required to contribute any amount towards the premium, enter "0.00".</p> <p>If the employer did not offer health coverage, or it offered health coverage that was not minimum essential coverage or did not provide minimum value, do not complete this line.</p> <p>Review IRS regulations for a complete explanation of these fields.</p> |
| 13   | <p>Enter the code or select the drop-down selection icon  in the <b>Safe Harbor Code</b> field to choose the employee's correct safe harbor code based upon IRS regulations. Enter the <b>Safe Harbor Code</b> for all 12 months.</p> <p>The <b>Safe Harbor</b> fields print on the employee's 1095-C form in Part II, Line 16 for each of the 12 months of the calendar year. Review IRS regulations for determining the correct codes for the employee.</p>  |
| 14   | <p>Select  (<b>Enter</b>).</p> <p>Select  (<b>F3</b> – Print this data) to obtain a screen print of the <i>Update/Display ACA Employee Data</i> screen. The screen print file will be available in the print queue with the name 'PSCNnnnn'.</p>  |


The following screen displays:



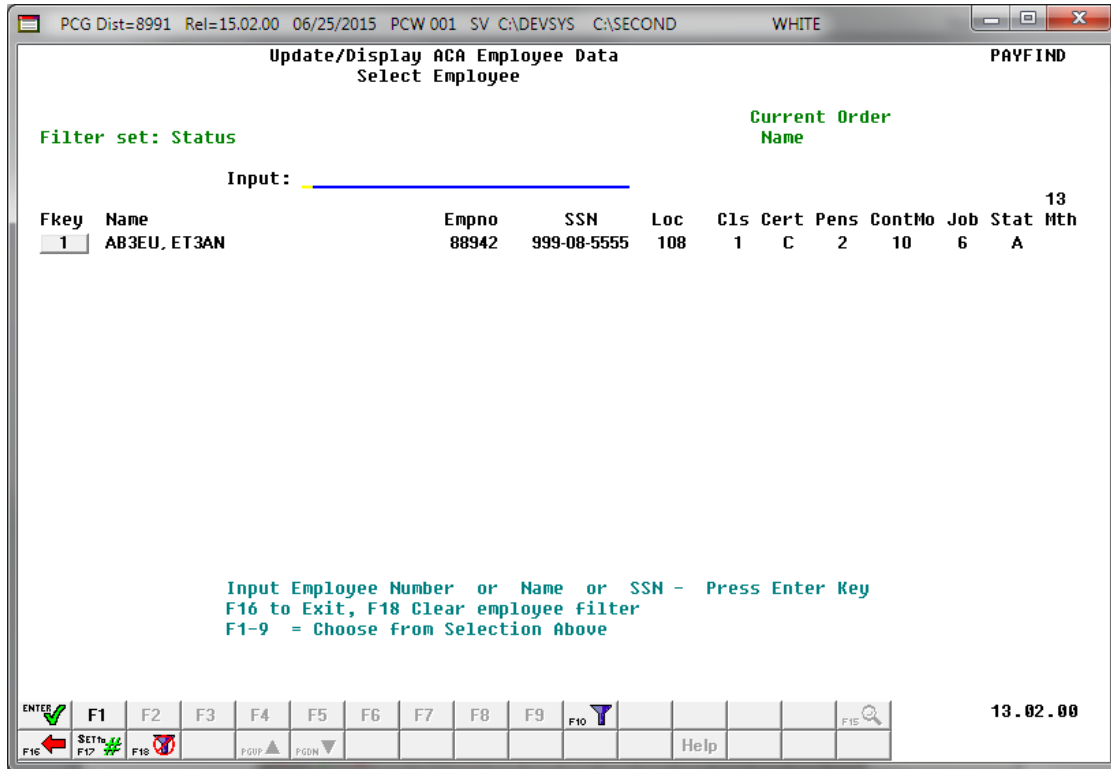
| Step | Action   |
|------|--|
| 15   | Verify “Validations passed. Save your changes.” displays and select  (F8 – Save changes). |


The following screen displays:



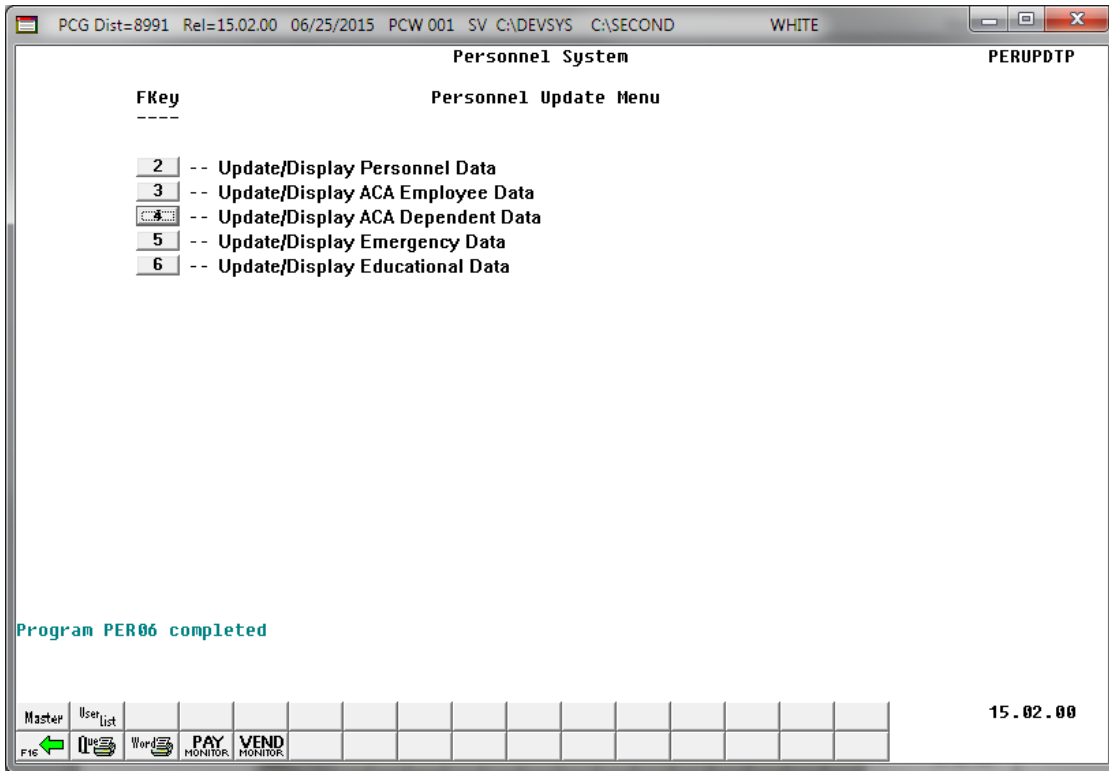
| Step | Action   |
|------|--|
| 16   | Verify "Data saved" displays, and select  (F16 – Exit) to the <i>Display/Update ACA Employee Data - Select Employee</i> screen. |



The following screen displays:



| Step | Action   |
|------|--|
| 17   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |

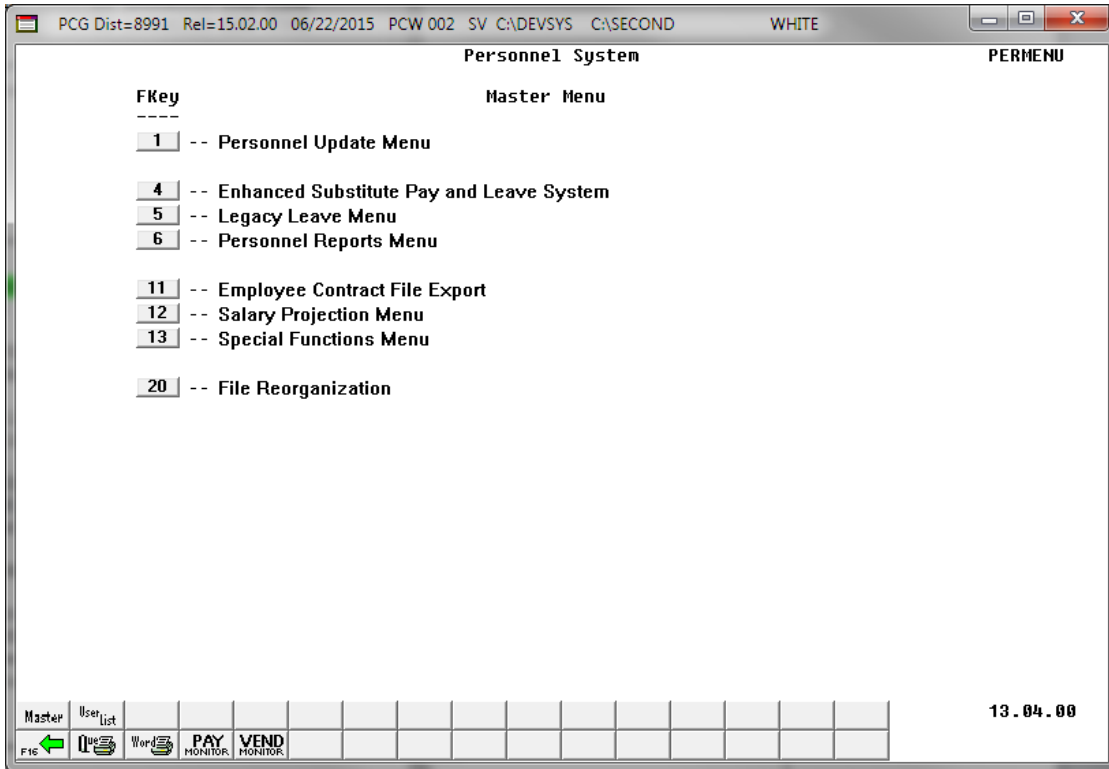
The following screen displays:



| Step | Action  |
|------|---|
| 18   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |

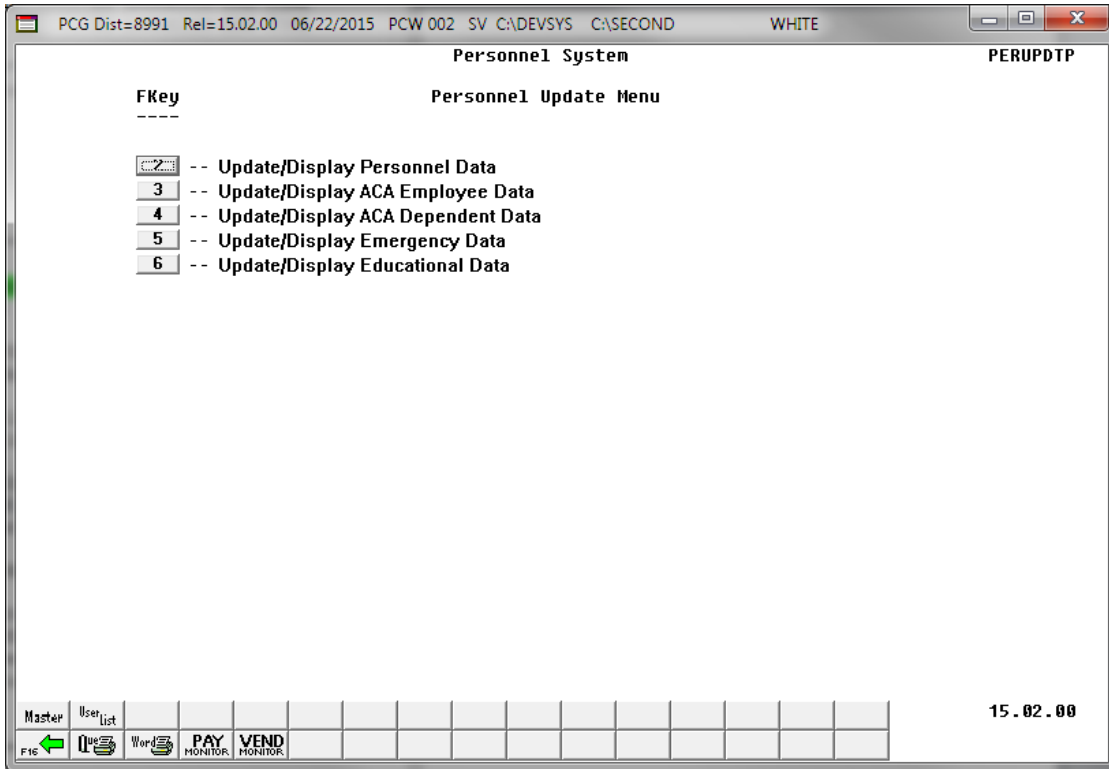


## C2: Delete ACA Employee Data



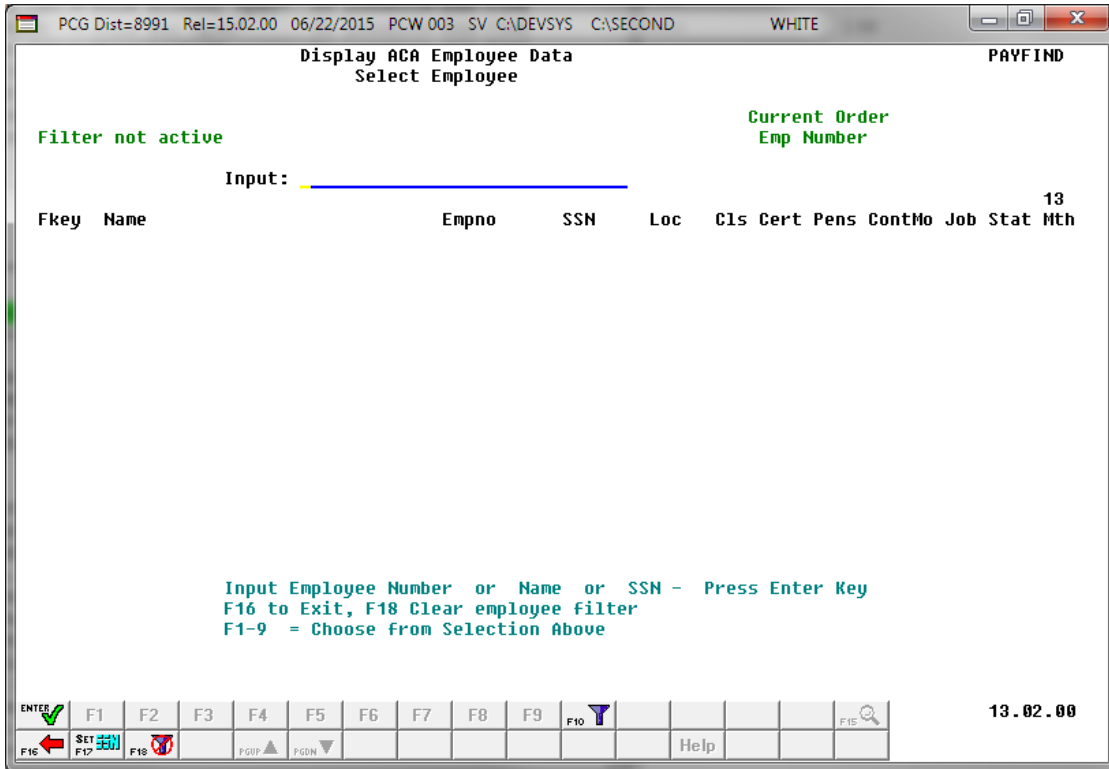
| Step | Action   |
|------|--|
| 1    | Select <b>F1</b> (F1 - Personnel Update Menu). |


The following screen displays:



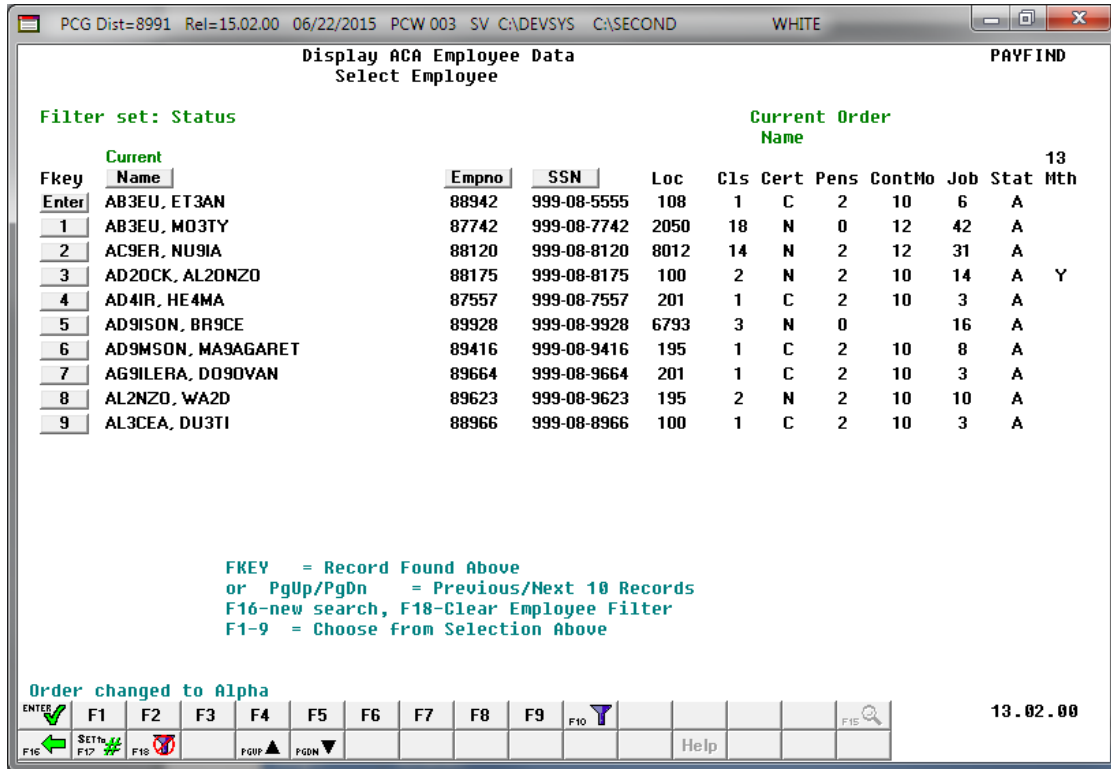
| Step | Action   |
|------|--|
| 2    | Select <b>3</b> (F3 - Update/Display ACA Employee Data). |




The following screen displays:



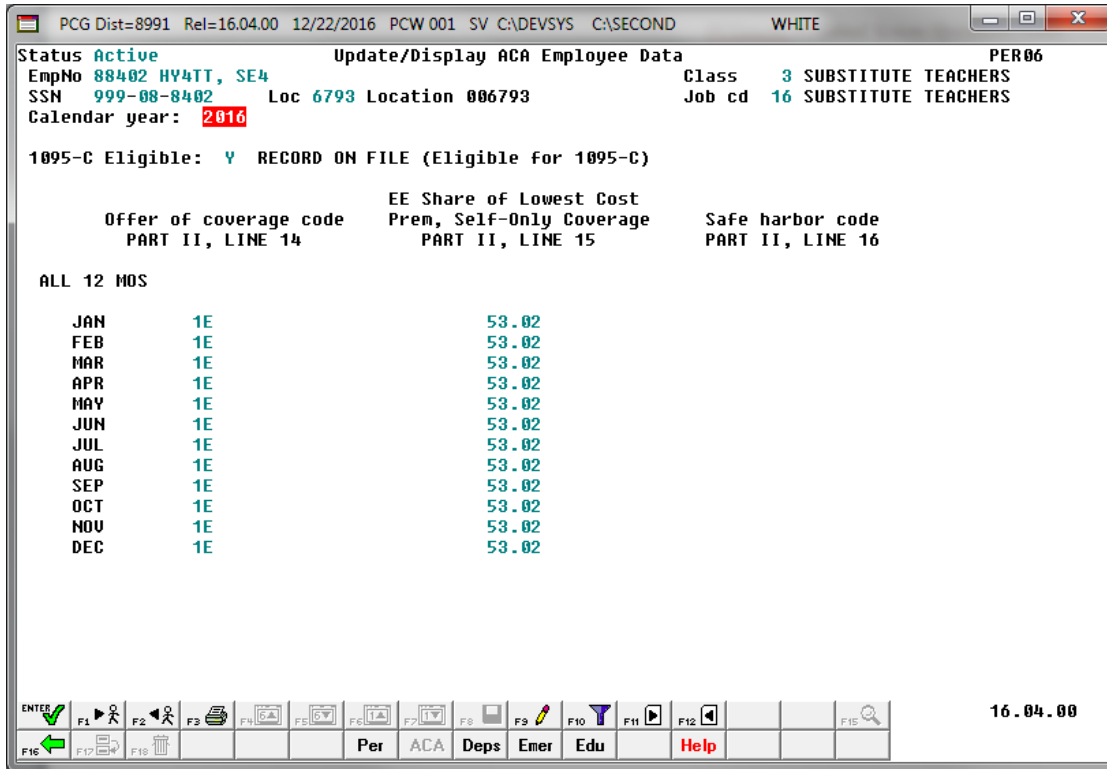
| Step | Action   |
|------|--|
| 3    | <p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 5</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and select <b>Enter</b>. 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:



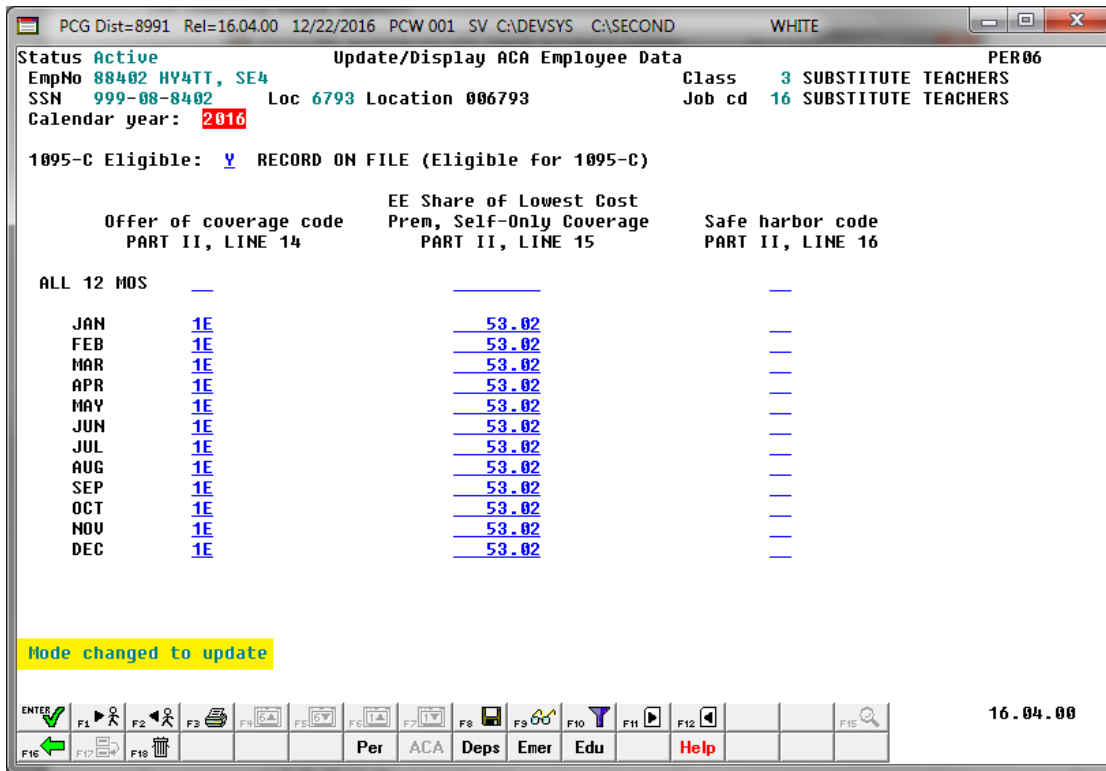
| Step | Action   |
|------|--|
| 4    | <p>Select <b>Enter</b> (Enter) or select the <b>Function key</b> corresponding to the employee's record, and select  (Enter).</p> <p>To sort by Name: Select <b>Name</b> (Name).</p> <p>To sort by Employee Number: Select <b>Empno</b> (Empno).</p> <p>To sort by Social 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> |





The following screen displays:



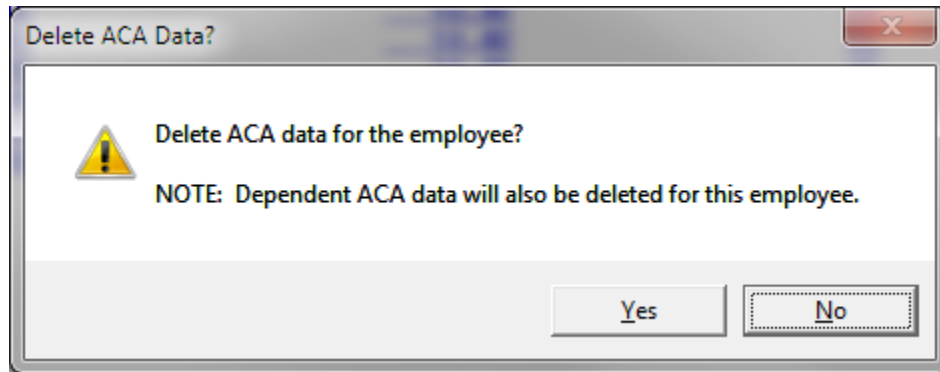
| Step | Action   |
|------|--|
| 5    | Select  (F9 – Switch to Update Mode). |

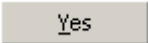
The following screen displays:



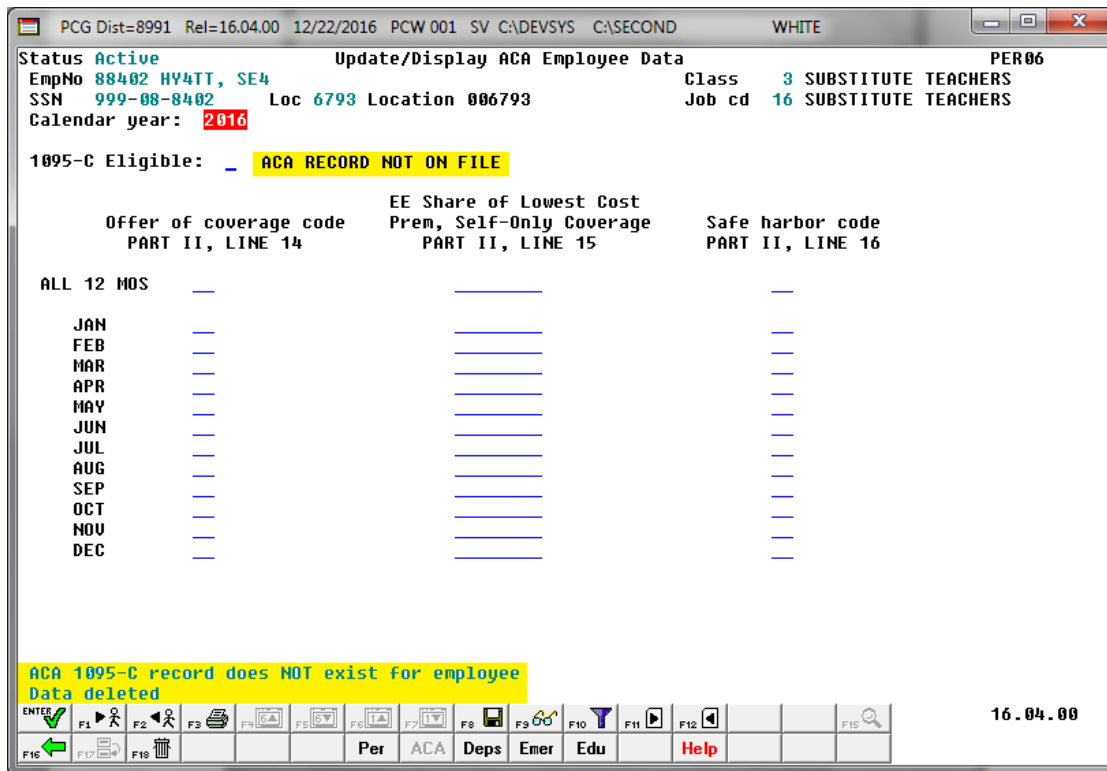
| Step | Action   |
|------|--|
| 6    | Verify “Mode changed to update” displays.  |
| 7    | <p>Verify the <b>Calendar Year</b> field.</p> <p>The system defaults the <b>Calendar Year</b> field based upon the current date. If the current month is January through June, the <b>Calendar Year</b> field defaults to the current year minus one. If the current month is July through December, the <b>Calendar Year</b> field defaults to the current year.</p> <p>Select  (F11 – Go to next calendar year) to display the <i>ACA Employee Data</i> for the next calendar year. Select  (F12 – Go to previous calendar year) to display the <i>ACA Employee Data</i> for the previous calendar year.</p> |
| 8    | <p>To delete the record, select  (F18 – Delete ACA Data).</p> <p>Select  (F3 – Print this data) to obtain a screen print of the <i>Update/Display ACA Employee Data</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’.</p>   |


The dialog box displays:



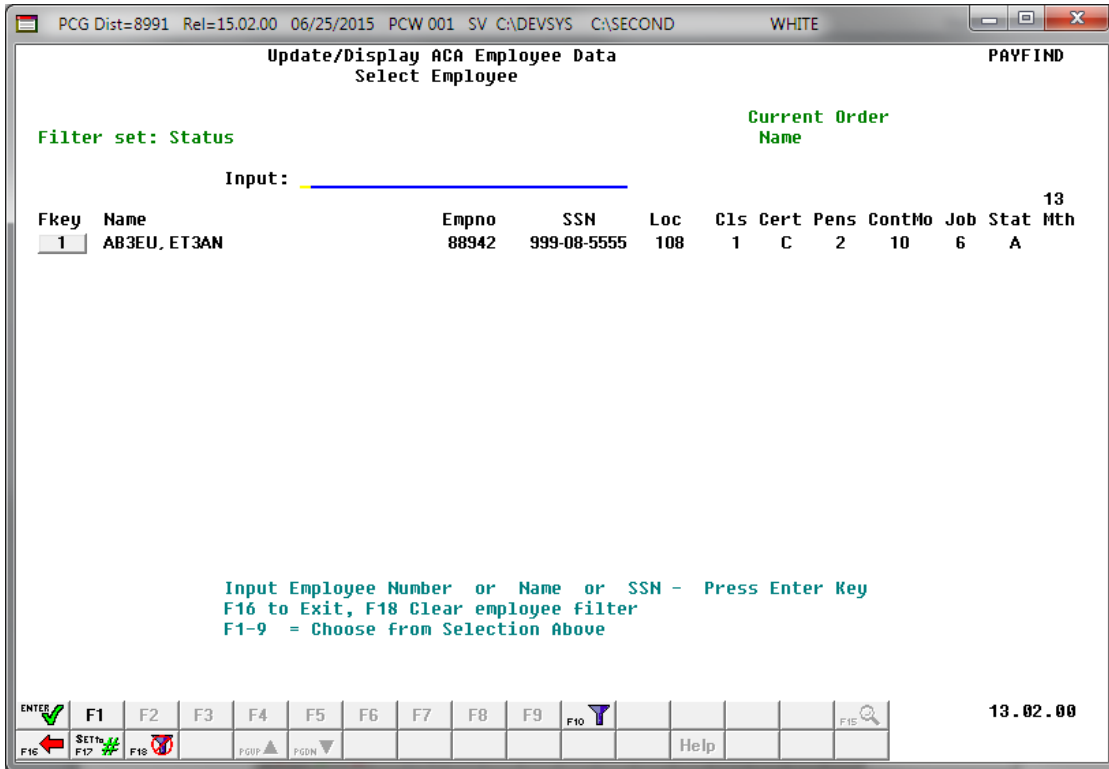
| Step | Action  |
|------|---|
| 9    | Select  (Yes) to delete the employee's ACA data. |


The following screen displays:



| Step | Action  |
|------|---|
| 10   | Verify "Data deleted" displays and verify the <b>1095-C Eligible</b> field is blank. Select  (F16 – Exit) to the <i>Display/Update ACA Employee Data - Select Employee</i> screen. |

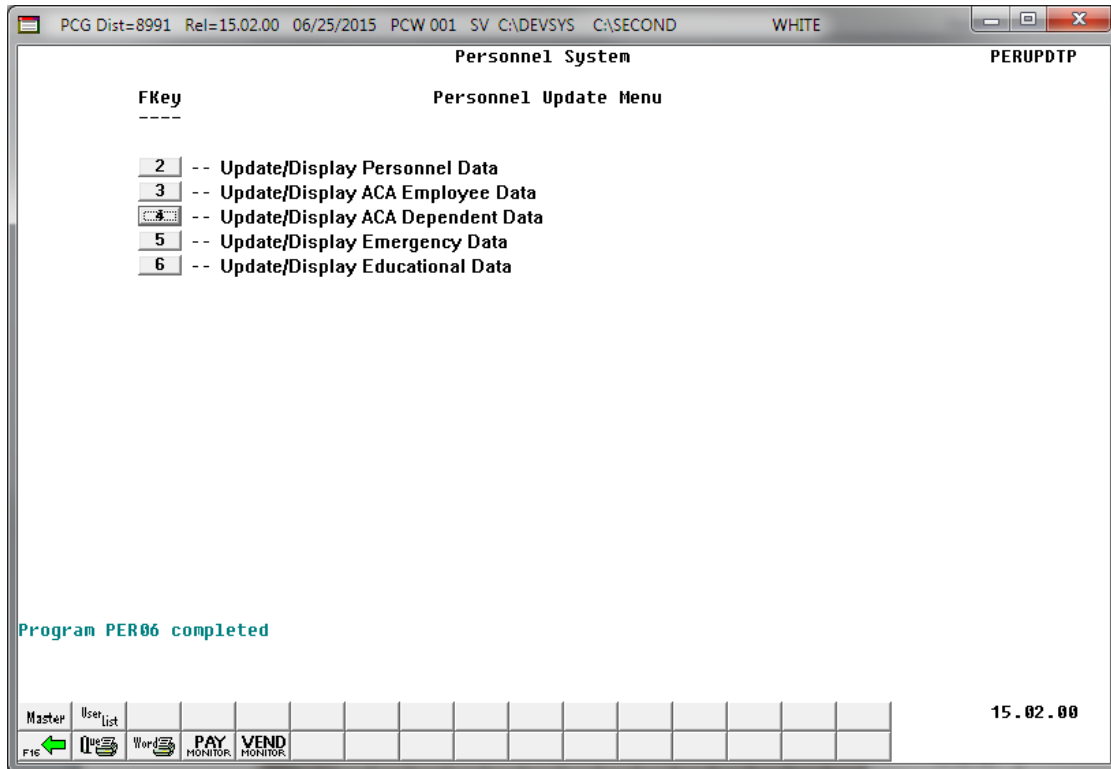
The following screen displays:





| Step | Action   |
|------|--|
| 11   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |



The following screen displays:



| Step | Action  |
|------|---|
| 12   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |

## Procedure D: ACA Dependent Data

Two ACA maintenance screens are available in PCGenesis on the *Personnel Update Menu*: *Update/Display ACA Employee Data* and *Update/Display ACA Dependent Data*. The purpose of these data entry screens is to facilitate producing IRS forms 1094-C and 1095-C for Affordable Healthcare reporting.

Below is information which details the **Form 1095-C** that is required starting in calendar year 2015. These forms will be produced at the same time as the W-2 forms, with a due date of January 31 of the reporting year. The forms and instructions can be found at [www.IRS.gov](http://www.IRS.gov). It is highly recommended that school district officials go to the IRS website and print and read the instructions for the 1094-C and the 1095-C.

### Form 1095-C: Employer-Provided Health Insurance Offer and Coverage

- Form 1095-C is an employee statement.
- Form 1095-C answers the question of whether the employer met the *Penalty B* threshold as related to the Patient Protection and Affordable Care Act (ACA).
- Form 1095-C: Part III – Covered Individuals:
  - Complete Part III ONLY if the employee enrolled in the employer-sponsored health coverage.
  - Columns (a) through (e) must be completed for each individual enrolled in the coverage, **including the employee himself**.
  - Column (d) or (e) must indicate the months in which the individual was covered.

| Part III Covered Individuals  |         |                                   |                           |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |
|---|---------|-----------------------------------|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| If Employer provided self-insured coverage, check the box and enter the information for each covered individual. <input type="checkbox"/> |         |                                   |                           |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |
| (a) Name of covered individual(s)   | (b) SSN | (c) DOB (if SSN is not available) | (d) Covered all 12 months | (e) Months of Coverage   |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |
|   |         |                                   |                           | Jan                      | Feb                      | Mar                      | Apr                      | May                      | June                     | July                     | Aug                      | Sept                     | Oct                      | Nov                      | Dec                      |
| 17  |         |                                   | <input type="checkbox"/>  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18  |         |                                   | <input type="checkbox"/>  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19  |         |                                   | <input type="checkbox"/>  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The *Update/Display ACA Dependent Data* screen allows entry of the employee data required for IRS form 1095-C. The data on the *Update/Display ACA Dependent Data* screen will be populated from the SHBP/ADP file-feed. For **GHI-eligible employees** who are offered coverage through SHBP, districts will receive a file-feed from SHBP/ADP. This transmission file from SHBP/ADP will contain the necessary information to populate the *Update/Display ACA Dependent Data* screen for those GHI-eligible employees. The transmission file contains those GHI-eligible employees’ dependent information.

The ADP file is a very complicated file, and the legalities involved with interpreting IRS ACA legislation are beyond the scope of the PCGenesis software. Therefore, PCGenesis reads the ADP file and loads dependent names, SSN's and date of births but NOT the months of coverage. PCGenesis will NOT read the ADP file to load **Offer of Coverage Codes, Safe Harbor Codes**, or months of coverage for employees or dependents.

For additional information about the ACA processes supported by PCGenesis, refer to the *Payroll System Operations Guide, Section D: Monthly/Quarterly/Annual/ Fiscal Report Processing, Topic 4: Processing Annual Reports – 1095-C Statement Processing*.

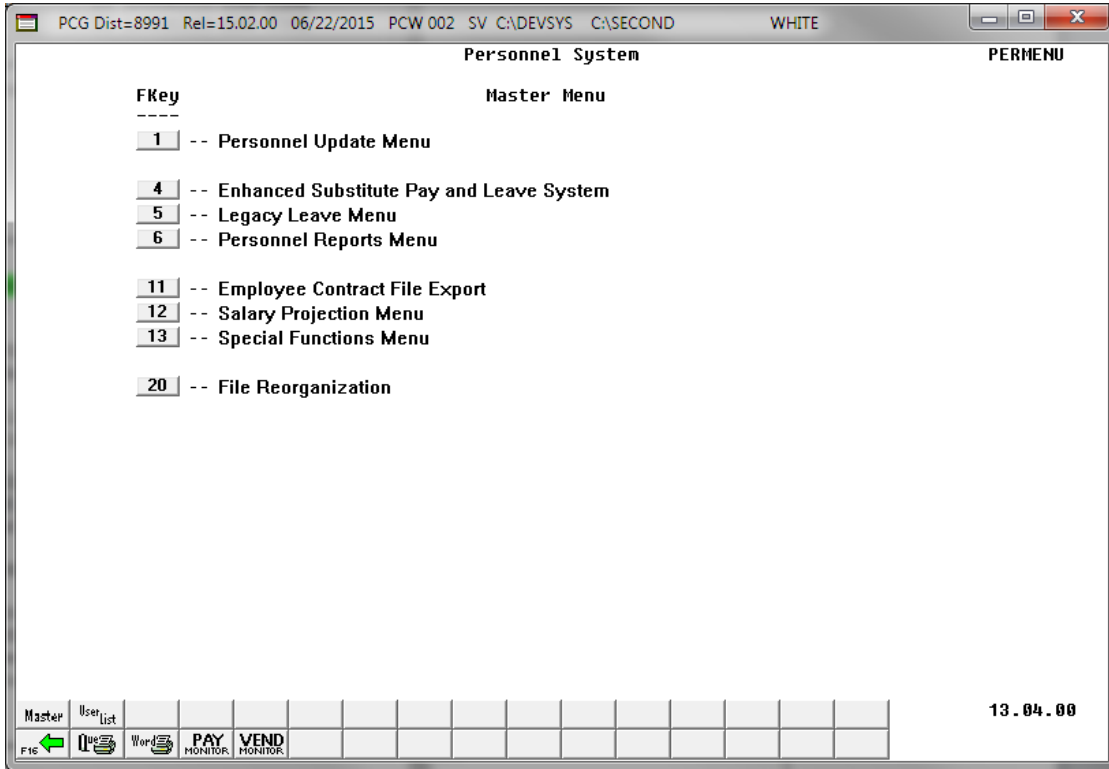
Any full-time employee who is **not** offered coverage through SHBP does not report dependent information on the 1095-C form. It is not necessary to enter any dependent information for employees who are not offered health insurance coverage by the LUA.

NOTE: Data can't be entered on the *Update/Display ACA Dependent Data* screen until the employee ACA data is created on the *Update/Display ACA Employee Data* screen. The **1095-C Eligible Flag** on the *Update/Display ACA Employee Data* screen must be set to 'Y' before any dependent data can be entered into the system for the employee. A **1095-C Eligible Flag** of 'Y' indicates to the system that the employee is full-time for ACA, that the employee will receive an IRS form 1095-C, and that the employee is eligible to report dependents on IRS form 1095-C.

**The Employer Shared Responsibility Provisions under the Affordable Care Act** do include penalties related to failure to comply with the employer responsibilities. Detailed information is located at <http://www.irs.gov/Affordable-Care-Act/Employers/Questions-and-Answers-on-Employer-Shared-Responsibility-Provisions-Under-the-Affordable-Care-Act>.

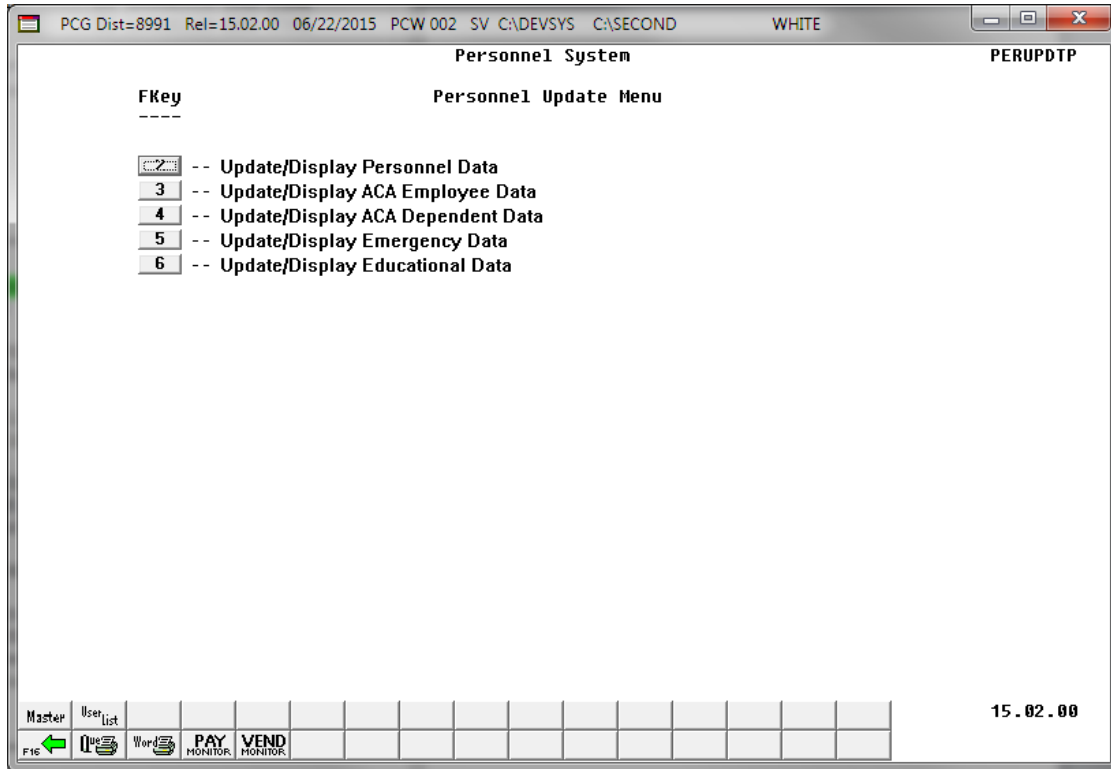
## D1: Update/Display ACA Dependent Data

Note: According to IRS specifications, dependent coverage data (Part III, columns (a) through (e) on IRS form 1095-C) must be completed for each individual enrolled in the coverage, **including the employee himself**.



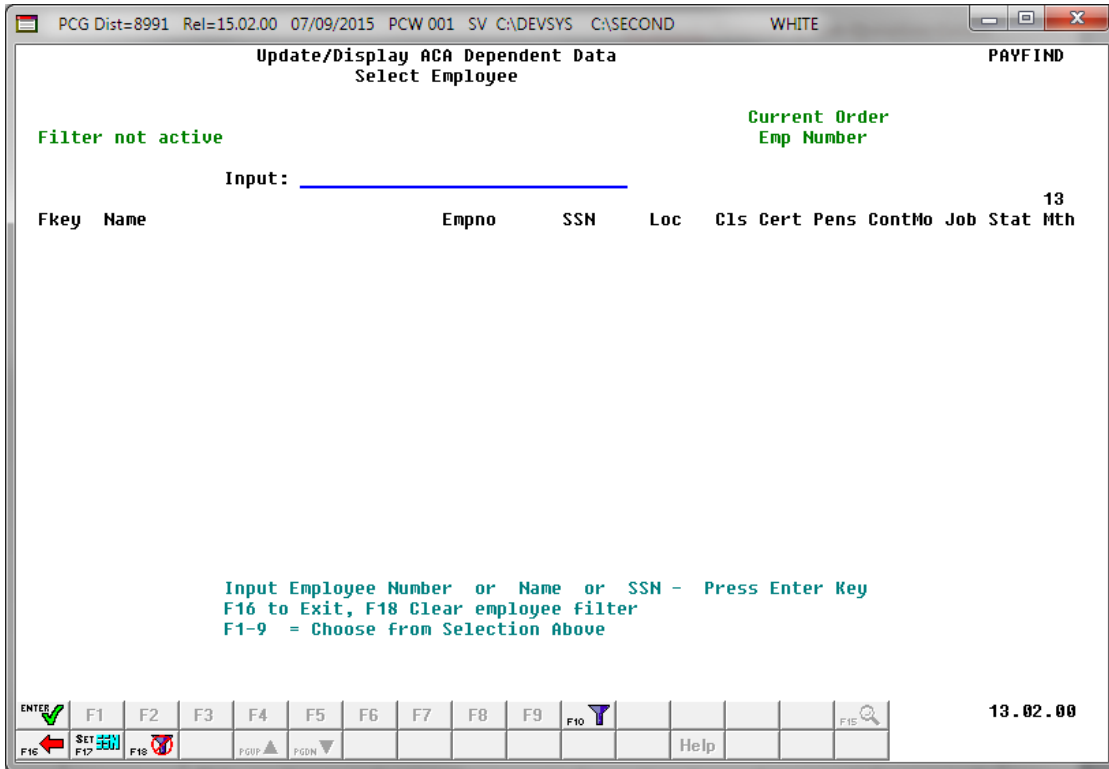
| Step | Action   |
|------|--|
| 1    | Select <b>F1</b> (F1 - Personnel Update Menu). |


The following screen displays:



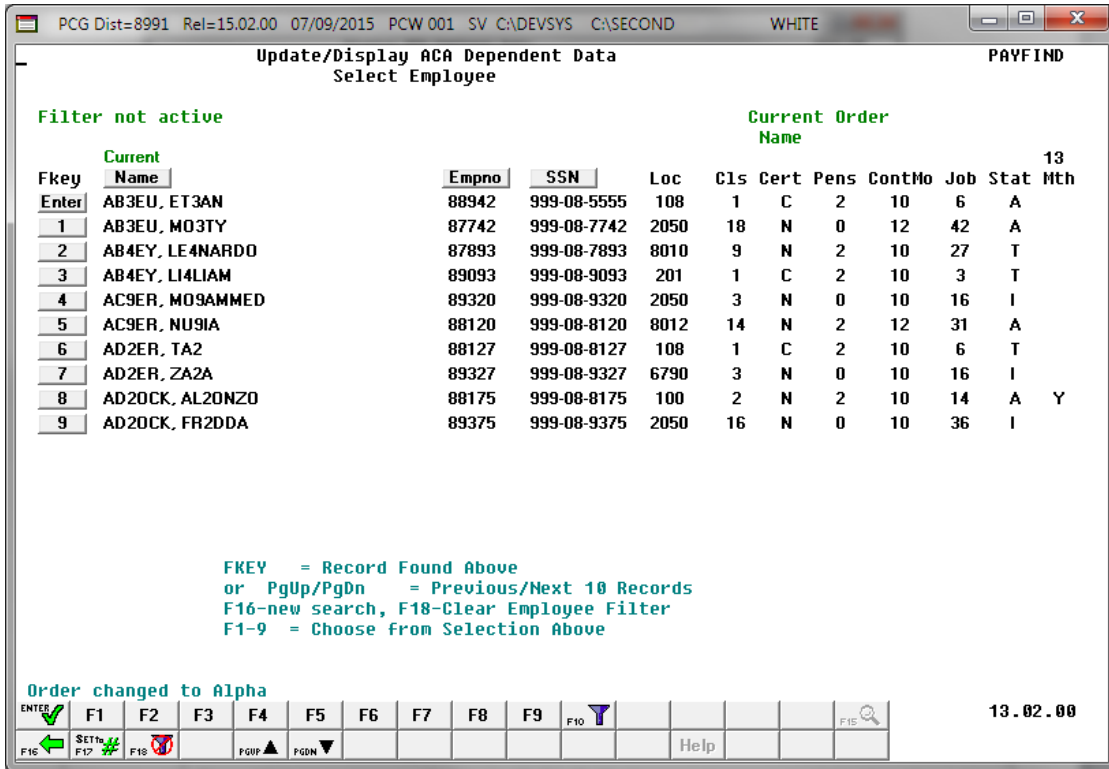
| Step | Action  |
|------|---|
| 2    | Select <b>4</b> (F4 - Update/Display ACA Dependent Data). |




The following screen displays:



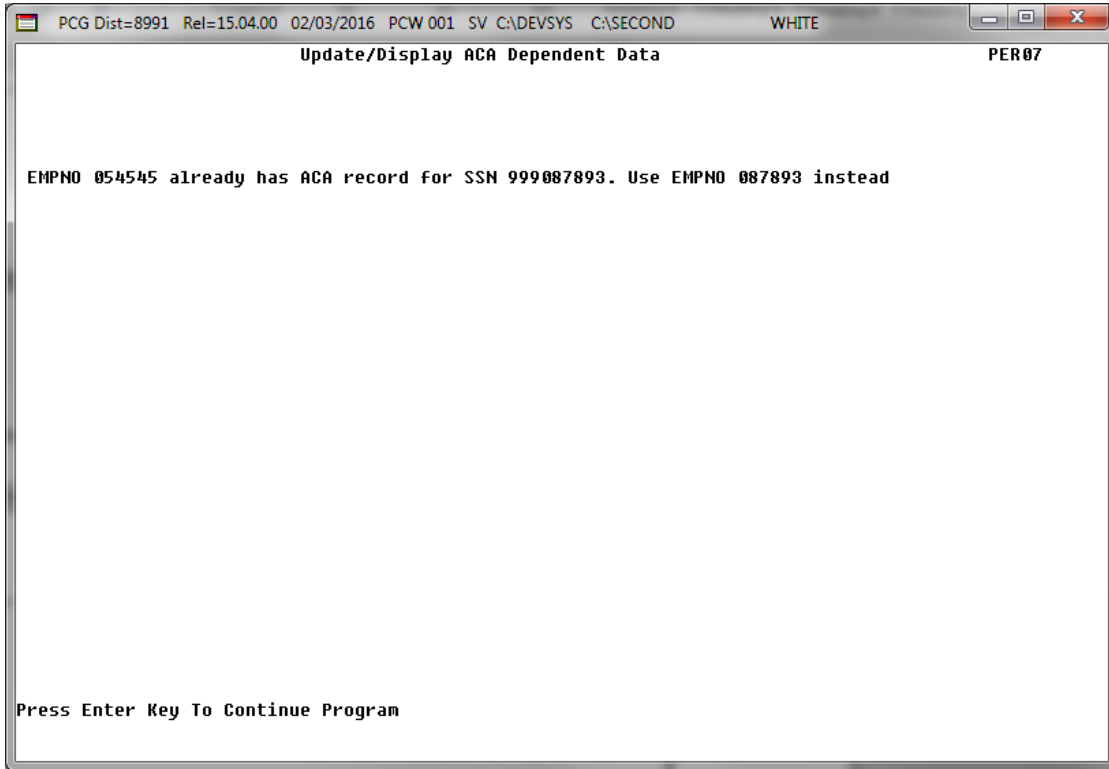
| Step | Action   |
|------|--|
| 3    | <p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 5</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and select <b>Enter</b>. 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> |

If an ACA record already exists for the employee’s Social Security Number, the following screen displays:



| Step | Action  |
|------|---|
| 5    | <p><u>When multiple employee ID numbers exist for the same Social Security Number:</u></p> <p>PCGenesis allows <u>one</u> employee ACA record to be created per Social Security Number. Therefore, if an employee ID number is entered and if an ACA record already exists for the employee’s Social Security Number, a screen will be displayed with the message, “EMPNO xxxxxx already has ACA record for SSN #####. Use EMPNO yyyyyy instead”. In this case, use the employee id number specified on the screen and return to Step 3.</p> <p>If the ACA data should be entered under the other employee ID number, the employee and dependent ACA data must first be deleted from the existing employee ID. To move the ACA data, go to the <i>Update/Display ACA Employee Data</i> screen and use <b>F18</b> to delete all of the employee’s ACA data for the Calendar Year. Then, create the employee and dependent ACA data using the preferred Employee ID number.</p> <p>To delete the existing ACA data, follow the procedures in section C2: <i>Delete ACA Employee Data</i>.</p> |



The following screen displays:

PCG Dist=8991 Rel=15.04.00 02/03/2016 PCW 001 SV CADEVSY5 CASECOND WHITE

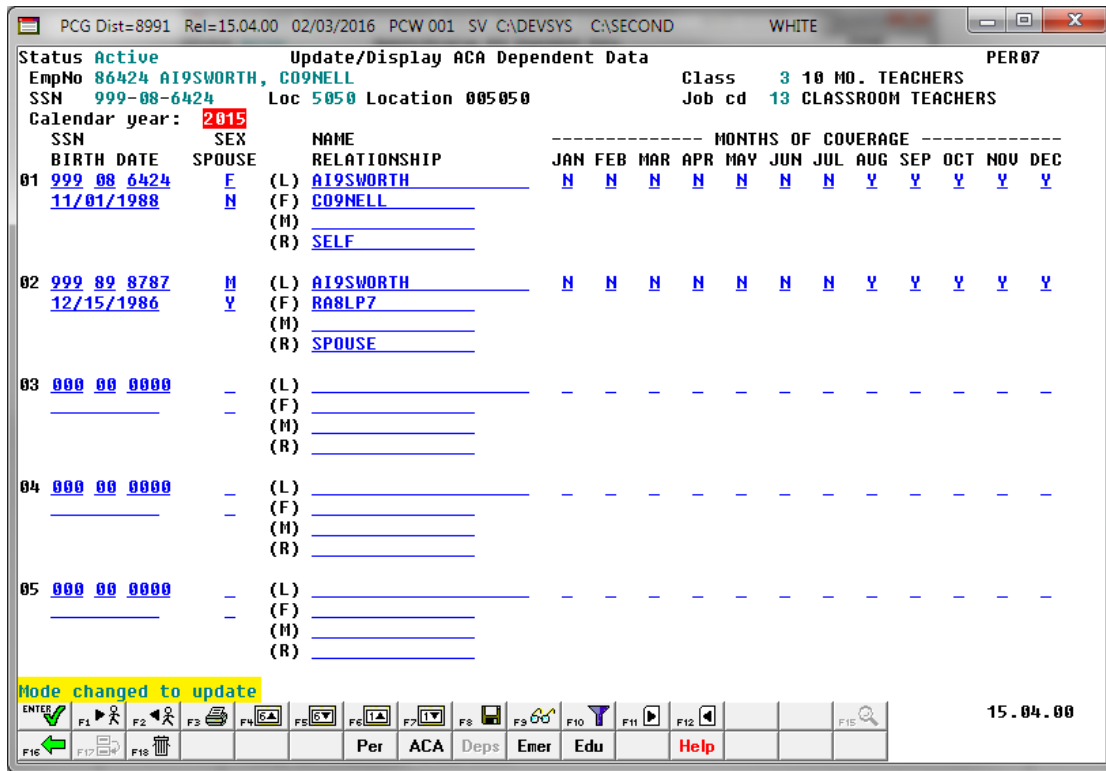
Status Active Update/Display ACA Dependent Data PER07  
 EmpNo 86424 AI9SWORTH, C09NELL Class 3 10 MO. TEACHERS  
 SSN 999-08-6424 Loc 5050 Location 005050 Job cd 13 CLASSROOM TEACHERS  
 Calendar year: 2015

| SSN            | BIRTH DATE | SEX | SPOUSE | NAME   | RELATIONSHIP | MONTHS OF COVERAGE |     |     |     |     |     |     |     |     |     |     |     |   |
|----------------|------------|-----|--------|--|--------------|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---|
|                |            |     |        |  |              | JAN                | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |   |
| 01 999 08 6424 | 11/01/1988 | F   | N      | (L) AI9SWORTH<br>(F) C09NELL<br>(M)<br>(R) SELF  |              | N                  | N   | N   | N   | N   | N   | N   | N   | Y   | Y   | Y   | Y   | Y |
| 02 999 89 8787 | 12/15/1986 | M   | Y      | (L) AI9SWORTH<br>(F) RA8LP7<br>(M)<br>(R) SPOUSE |              | N                  | N   | N   | N   | N   | N   | N   | N   | Y   | Y   | Y   | Y   | Y |
| 03 000 00 0000 |            |     |        | (L)<br>(F)<br>(M)<br>(R)                         |              |                    |     |     |     |     |     |     |     |     |     |     |     |   |
| 04 000 00 0000 |            |     |        | (L)<br>(F)<br>(M)<br>(R)                         |              |                    |     |     |     |     |     |     |     |     |     |     |     |   |
| 05 000 00 0000 |            |     |        | (L)<br>(F)<br>(M)<br>(R)                         |              |                    |     |     |     |     |     |     |     |     |     |     |     |   |



15.04.00



| Step | Action   |
|------|--|
| 6    | Select  (F9 – Switch to Update Mode). |

The following screen displays:




| Step | Action   |
|------|--|
| 7    | <p>Verify “Mode changed to update” displays.</p> <p>NOTE: Data can’t be entered on the <i>Update/Display ACA Dependent Data</i> screen until the <u>employee</u> ACA data is created on the <i>Update/Display ACA Employee Data</i> screen, otherwise the message “ACA record must exist for employee before dependents can be added” is displayed.</p> <p>The <b>1095-C Eligible Flag</b> on the <i>Update/Display ACA Employee Data</i> screen must be set to ‘Y’ before any dependent data can be entered into the system for the employee, otherwise the message “1095-C Eligible Flag must be ‘Y’ before dependents can be added” is displayed.</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 of an Fkey, verify the fields’ entries are correct for the employee. If the information is incorrect, make the appropriate modifications to the field entries.</i></p> |

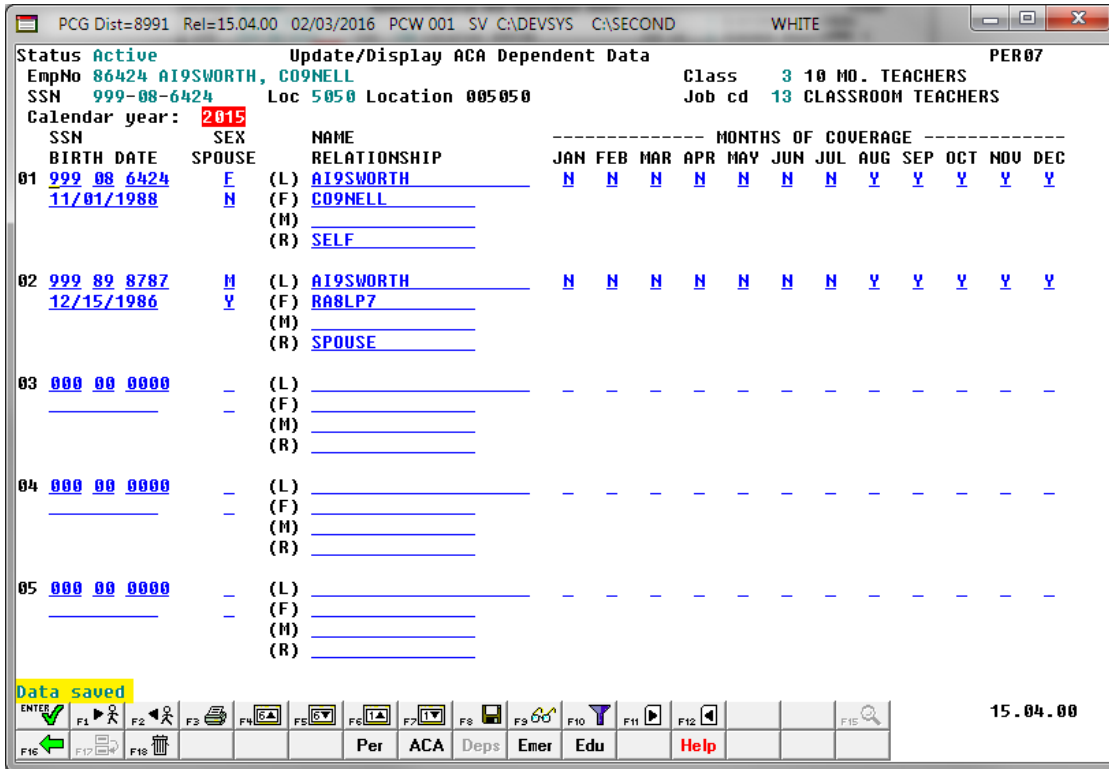
| Step | Action   |
|------|--|
| 8    | <p>Verify the <b>Calendar Year</b> field.</p> <p>The system defaults the <b>Calendar Year</b> field based upon the current date. If the current month is January through June, the <b>Calendar Year</b> field defaults to the current year minus one. If the current month is July through December, the <b>Calendar Year</b> field defaults to the current year.</p> <p>Select  (F11 – Go to next calendar year) to display the <i>ACA Dependent Data</i> for the next calendar year. Select  (F12 – Go to previous calendar year) to display the <i>ACA Dependent Data</i> for the previous calendar year.</p> |
| 9    | Enter the dependent's social security number in the <b>SSN</b> (Social Security Number) field.   |
| 10   | <p>Enter the dependent's date of birth (MM/DD/CCYY) in the <b>Birth Date</b> field.</p> <p><i>The <b>Birth Date</b> field is optional if the dependent's social security number has been entered in the <b>SSN</b> field.</i></p>  |
| 11   | <p>Enter <b>F</b> (Female) or <b>M</b> (Male) in the <b>Sex Code</b> field to identify the dependent's gender.</p> <p><i>The <b>Sex Code</b> is an optional field.</i></p>   |
| 12   | <p>Enter <b>N</b> (Not the spouse) or <b>Y</b> (Spouse) in the <b>Spouse</b> field to identify whether or not the dependent is a spouse.</p> <p><i>The <b>Spouse Code</b> is an optional field.</i></p>  |
| 13   | <p>Enter the dependent's last name, up to twenty (20) characters in the <b>NAME (L)</b> field.</p> <p><i>The last name field is a required field.</i></p>  |
| 14   | <p>Enter the dependent's first name, up to fifteen (15) characters in the <b>NAME (F)</b> field.</p> <p><i>The First name is a required field.</i></p>   |
| 15   | <p>Enter the dependent's middle name or middle initial, up to fifteen (15) characters in the <b>NAME (M)</b> field.</p> <p><i>The Middle name or initial is an optional field.</i></p>   |
| 16   | <p>Enter the dependent's relationship to the employee, up to fifteen (15) characters, in the <b>RELATIONSHIP (R)</b> field.</p> <p><i>The Relationship is an optional field.</i></p>   |


| Step | Action  |
|------|---|
| 17   | <p>Enter the <b>Months of Coverage</b> fields for January (<b>JAN</b>) through December (<b>DEC</b>). The <b>Months of Coverage</b> fields on the <i>Update/Display ACA Dependent Data</i> screen indicate to the system whether the dependent was covered by the employee’s healthcare plan at any time during the calendar year. Enter the <b>Months of Coverage</b> field for all 12 months.</p> <p>Valid values:</p> <p><b>Y</b> – The dependent was covered by the employee’s healthcare plan<br/> <b>N</b> – The dependent was <u>not</u> covered by the employee’s healthcare plan</p> |
| 18   | <p>Select  (<b>Enter</b>).</p> <p>Select  (<b>F3</b> – Print this data) to obtain a screen print of the <i>Update/Display ACA Dependent Data</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’.</p>   |

The following screen displays:

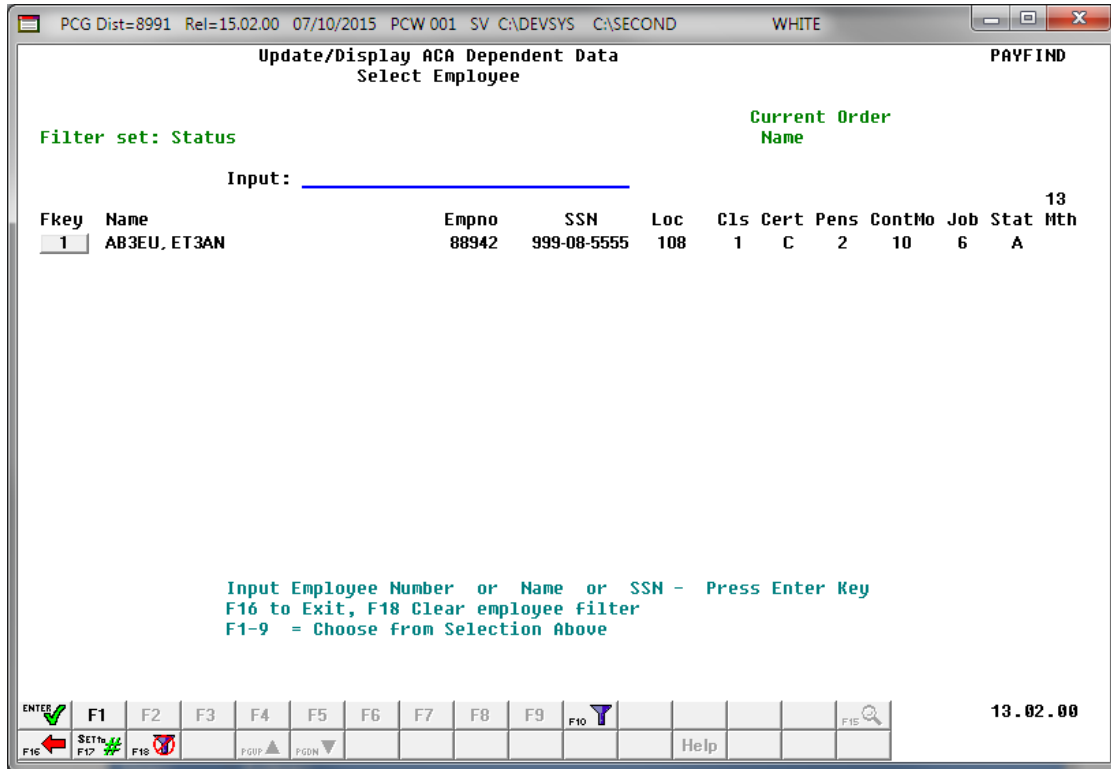
| Step | Action  |
|------|---|
| 19   | <p>Verify “<i>Validations passed. Save your changes.</i>” displays and select  (<b>F8</b> – Save changes).</p> |


The following screen displays:



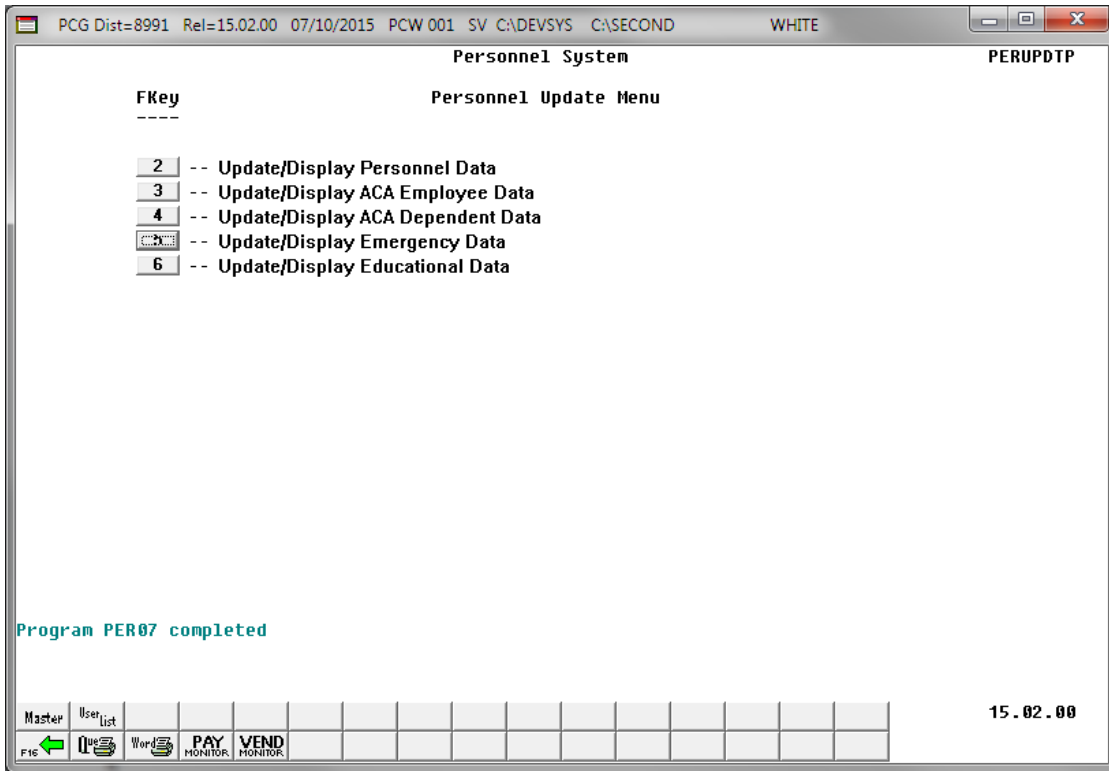
| Step | Action  |
|------|---|
| 20   | Verify "Data saved" displays, and select  (F16 – Exit) to the <i>Display/Update ACA Dependent Data - Select Employee</i> screen. |



The following screen displays:



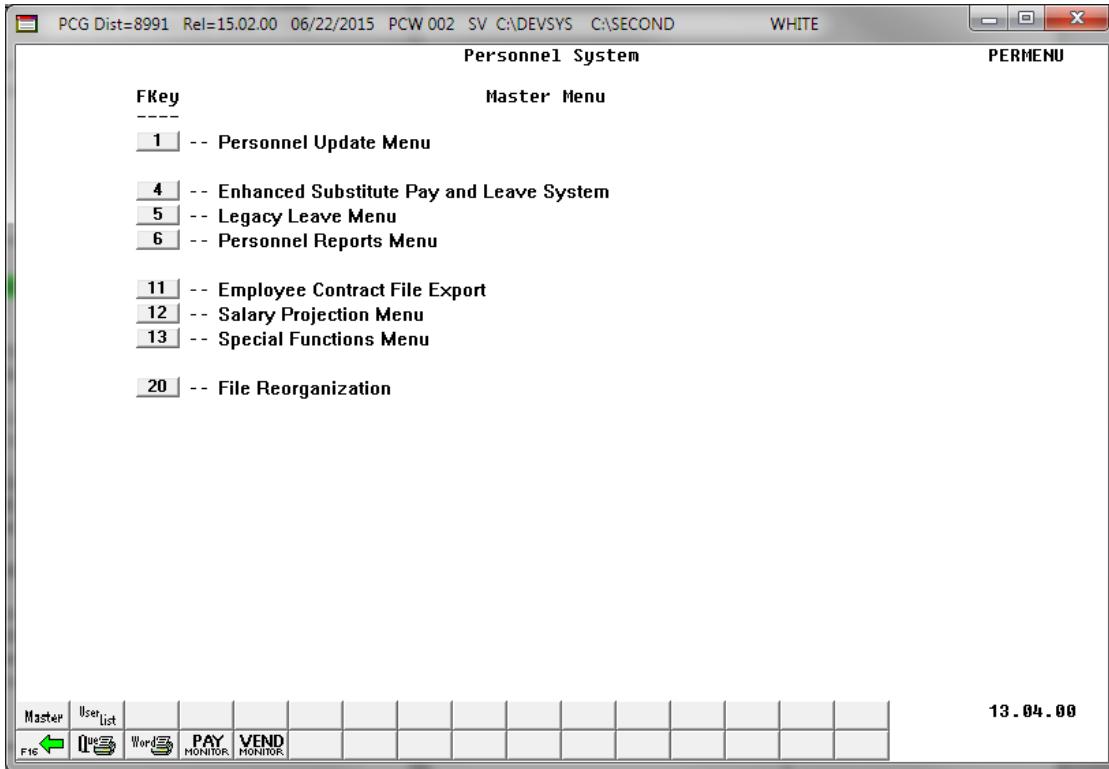
| Step | Action   |
|------|--|
| 21   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |

The following screen displays:



| Step | Action  |
|------|---|
| 22   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |

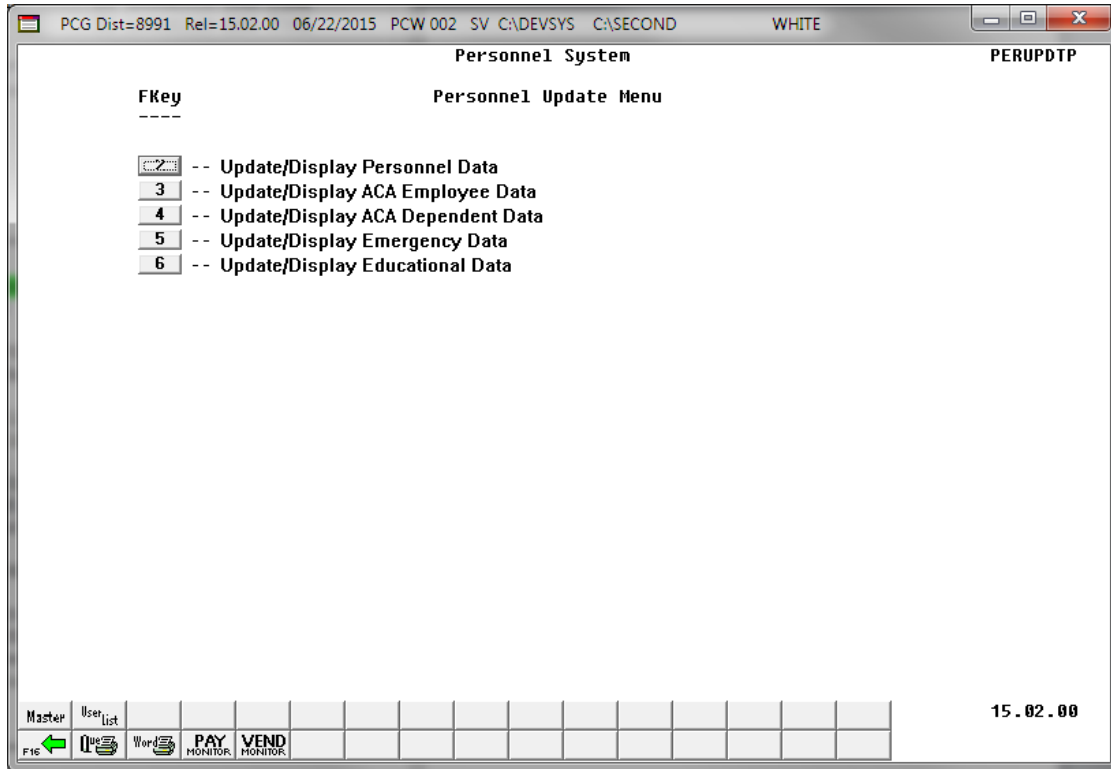
## D2: Delete ALL ACA Dependent Data



| Step | Action   |
|------|--|
| 1    | Select <b>F1</b> (F1 - Personnel Update Menu). |

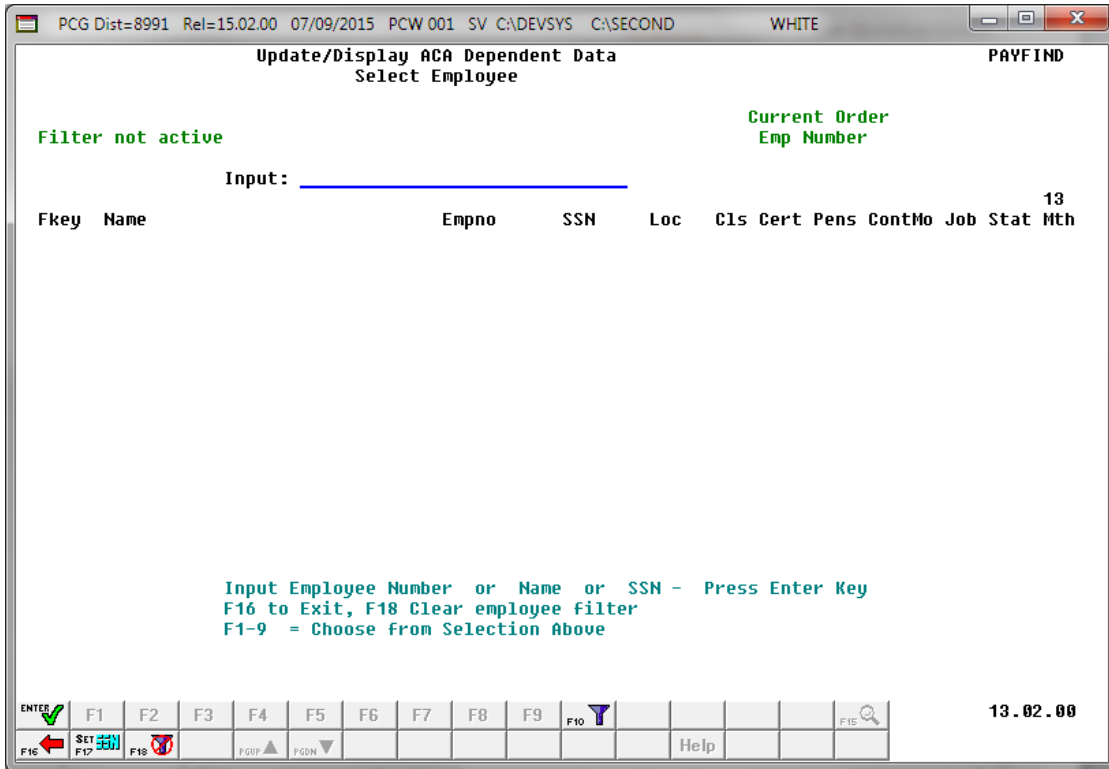



The following screen displays:



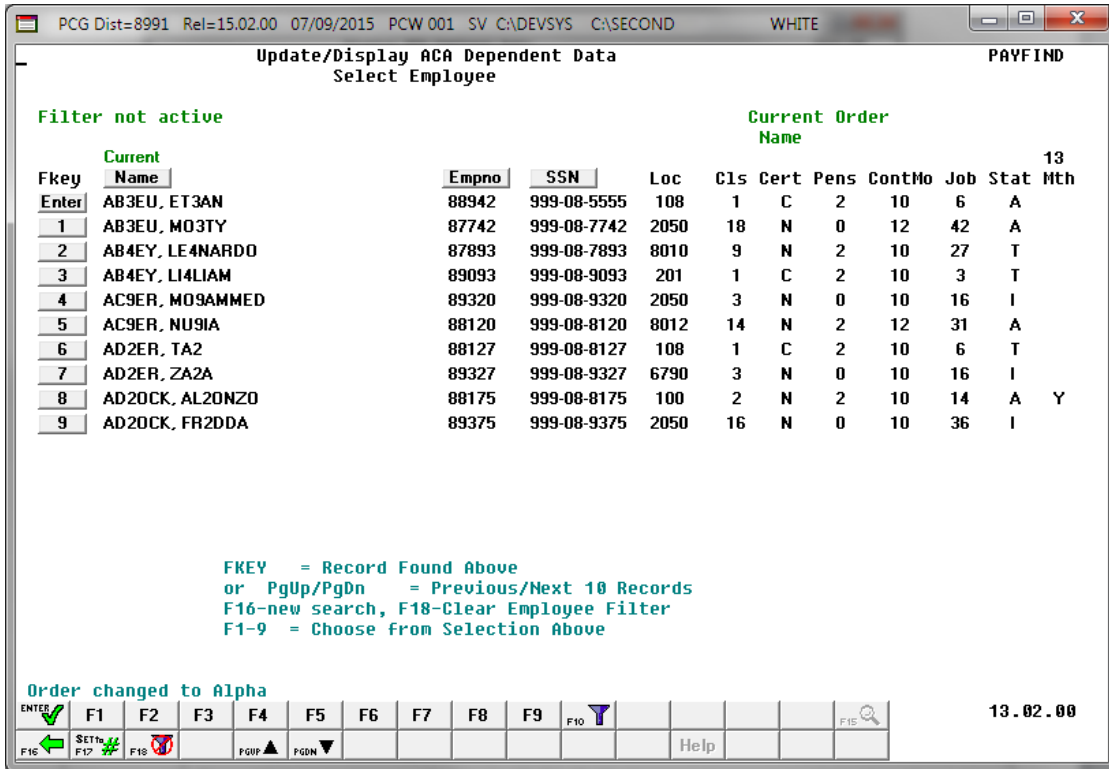
| Step | Action  |
|------|---|
| 2    | Select <b>4</b> (F4 - Update/Display ACA Dependent Data). |




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 <b>Enter</b>. 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> |

The following screen displays:

PCG Dist=8991 Rel=15.04.00 02/03/2016 PCW 001 SV CADEVSYS CASECOND WHITE

Status Active Update/Display ACA Dependent Data PER07  
 EmpNo 86424 AI9SWORTH, C09NELL Class 3 10 MO. TEACHERS  
 SSN 999-08-6424 Loc 5050 Location 005050 Job cd 13 CLASSROOM TEACHERS  
 Calendar year: 2015

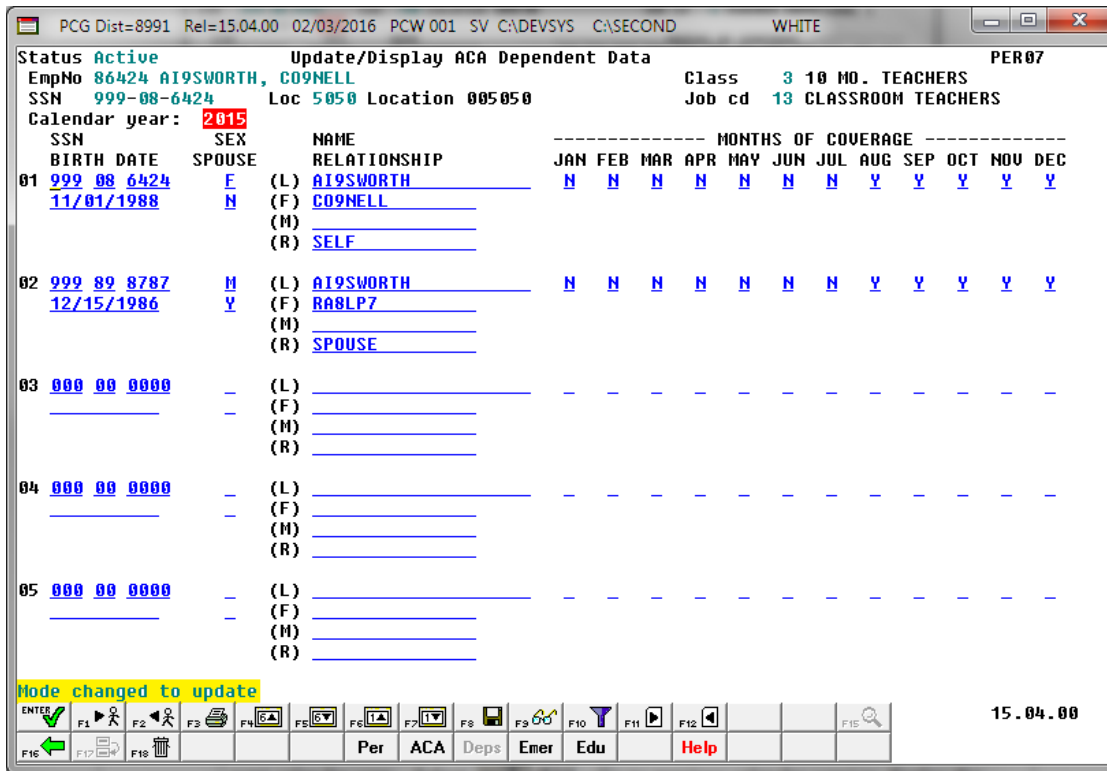
|    | SSN         | BIRTH DATE | SEX | SPOUSE | NAME          | RELATIONSHIP | MONTHS OF COVERAGE |     |     |     |     |     |     |     |     |     |     |     |
|----|-------------|------------|-----|--------|---------------|--------------|--------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|    |             |            |     |        |               |              | JAN                | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
| 01 | 999 08 6424 | 11/01/1988 | F   | N      | (L) AI9SWORTH |              | N                  | N   | N   | N   | N   | N   | N   | Y   | Y   | Y   | Y   | Y   |
|    |             |            |     |        | (F) C09NELL   |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (M) SELF      |              |                    |     |     |     |     |     |     |     |     |     |     |     |
| 02 | 999 89 8787 | 12/15/1986 | M   | Y      | (L) AI9SWORTH |              | N                  | N   | N   | N   | N   | N   | N   | Y   | Y   | Y   | Y   | Y   |
|    |             |            |     |        | (F) RABLP7    |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (M) SPOUSE    |              |                    |     |     |     |     |     |     |     |     |     |     |     |
| 03 | 000 00 0000 |            |     |        | (L)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (F)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (M)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (R)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
| 04 | 000 00 0000 |            |     |        | (L)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (F)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (M)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (R)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
| 05 | 000 00 0000 |            |     |        | (L)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (F)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (M)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |
|    |             |            |     |        | (R)           |              |                    |     |     |     |     |     |     |     |     |     |     |     |





ENTER [F1] [F2] [F3] [F4] [F5] [F6] [F7] [F8] [F9] [F10] [F11] [F12] [F15]

Per ACA Deps Emer Edu Help 15.04.00

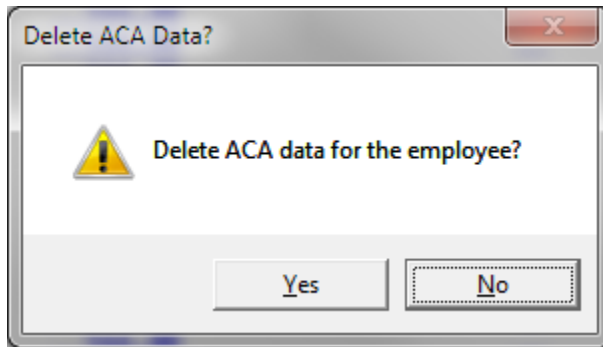
| Step | Action   |
|------|--|
| 5    | Select  (F9 – Switch to Update Mode). |

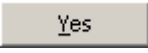

The following screen displays:



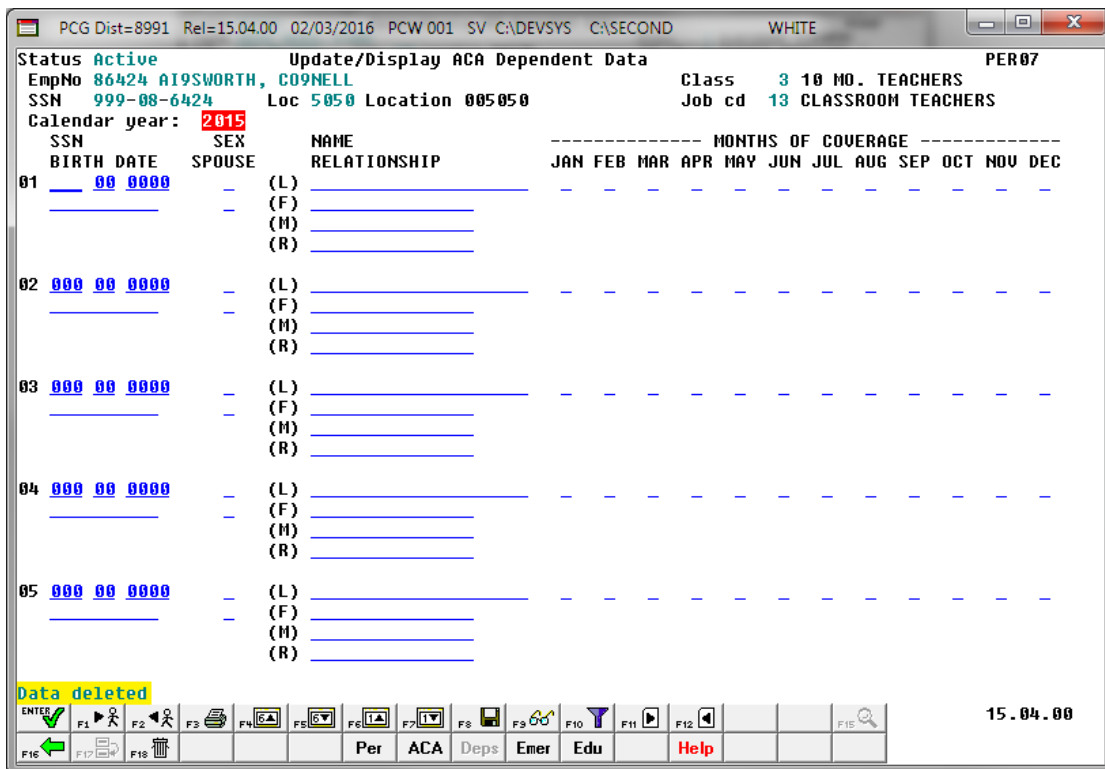
| Step | Action  |
|------|---|
| 6    | Verify “Mode changed to update” displays.   |
| 7    | <p>Verify the <b>Calendar Year</b> field.</p> <p>The system defaults the <b>Calendar Year</b> field based upon the current date. If the current month is January through June, the <b>Calendar Year</b> field defaults to the current year minus one. If the current month is July through December, the <b>Calendar Year</b> field defaults to the current year.</p> <p>Select  (F11 – Go to next calendar year) to display the <i>ACA Dependent Data</i> for the next calendar year. Select  (F12 – Go to previous calendar year) to display the <i>ACA Dependent</i> for the previous calendar year.</p> |
| 8    | <p>To delete the record, select  (F18 – Delete ACA Data).</p> <p>Select  (F3 – Print this data) to obtain a screen print of the <i>Update/Display ACA Dependent Data</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’.</p>   |


The dialog box displays:



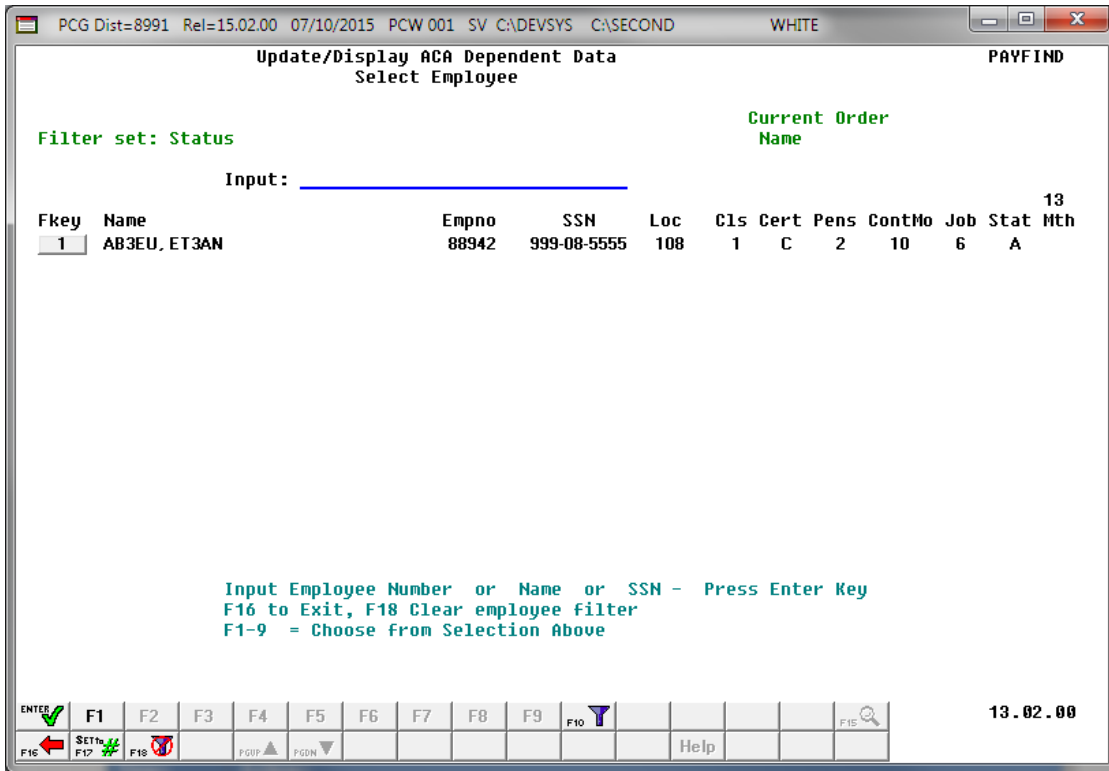
| Step | Action  |
|------|---|
| 9    | Select  (Yes) to delete the employee's ACA dependent data.<br>Note: If <b>Yes</b> is selected, <u>ALL</u> dependents will be deleted for the employee. To delete only <u>one</u> of many dependents, simply space out all of the data fields related to the dependent to be deleted, and select  (F8 – Save). |


The following screen displays:



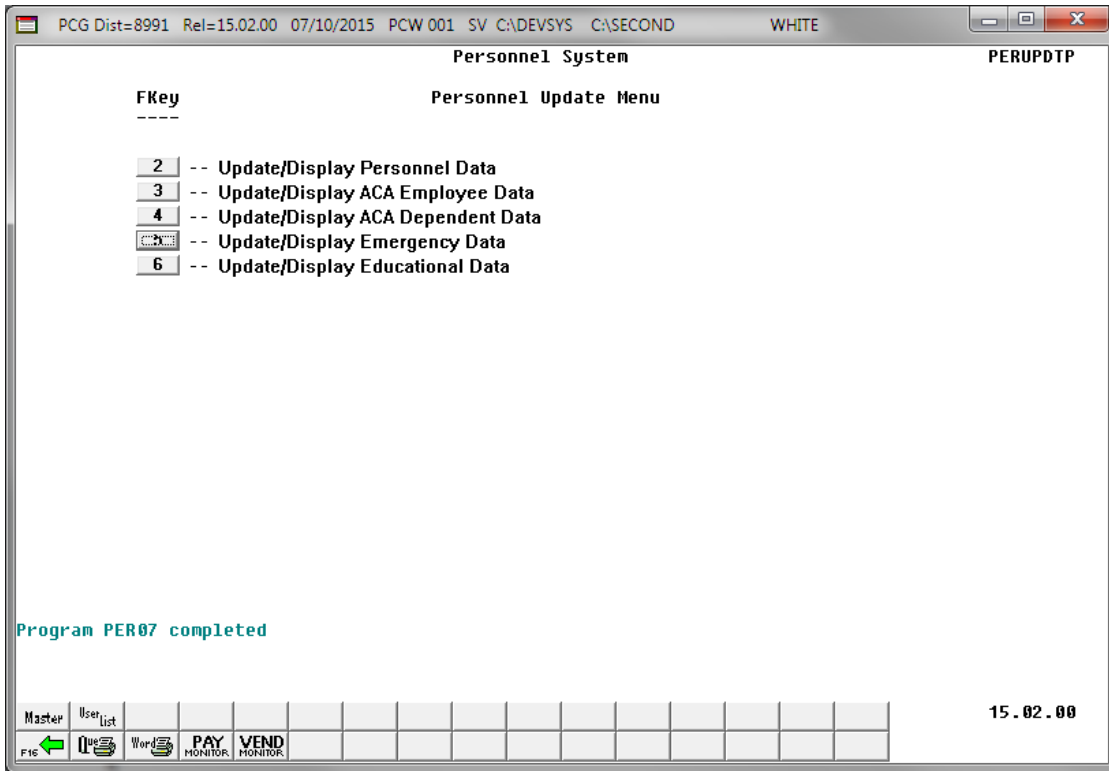
| Step | Action   |
|------|--|
| 10   | Verify “Data deleted” displays and select  (F16 – Exit) to the <i>Display/Update ACA Dependent Data - Select Employee</i> screen. |



The following screen displays:



| Step | Action   |
|------|--|
| 11   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |

The following screen displays:

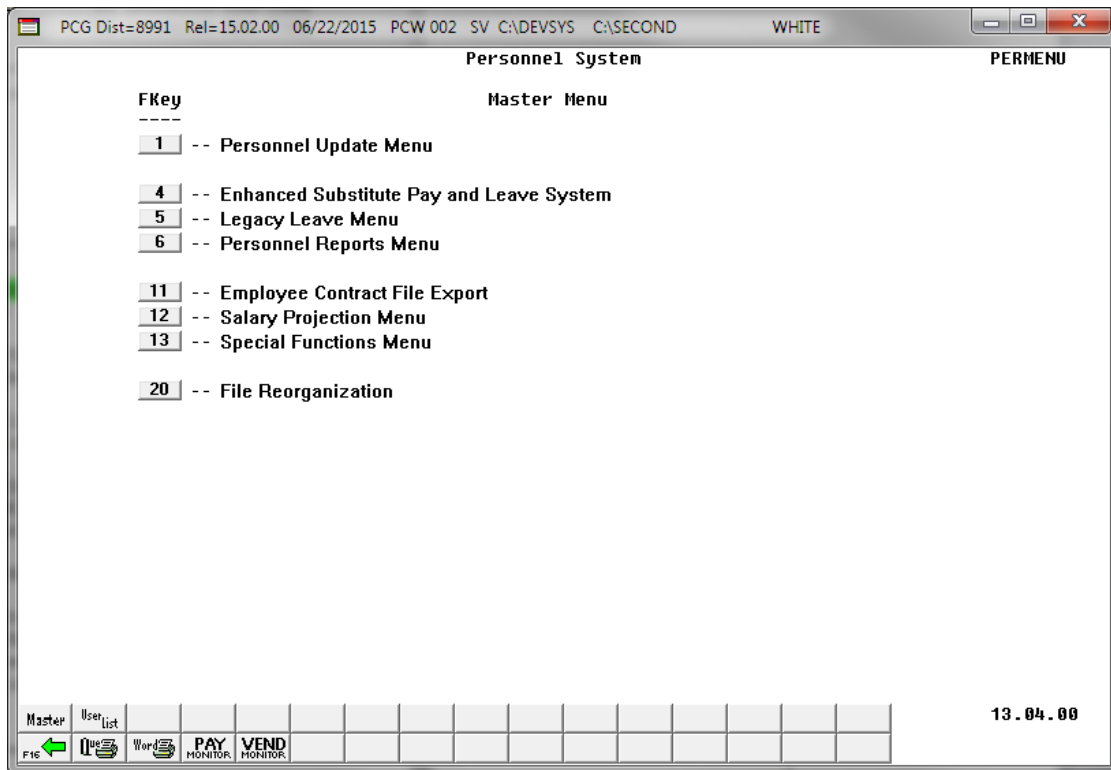


| Step | Action  |
|------|---|
| 12   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |



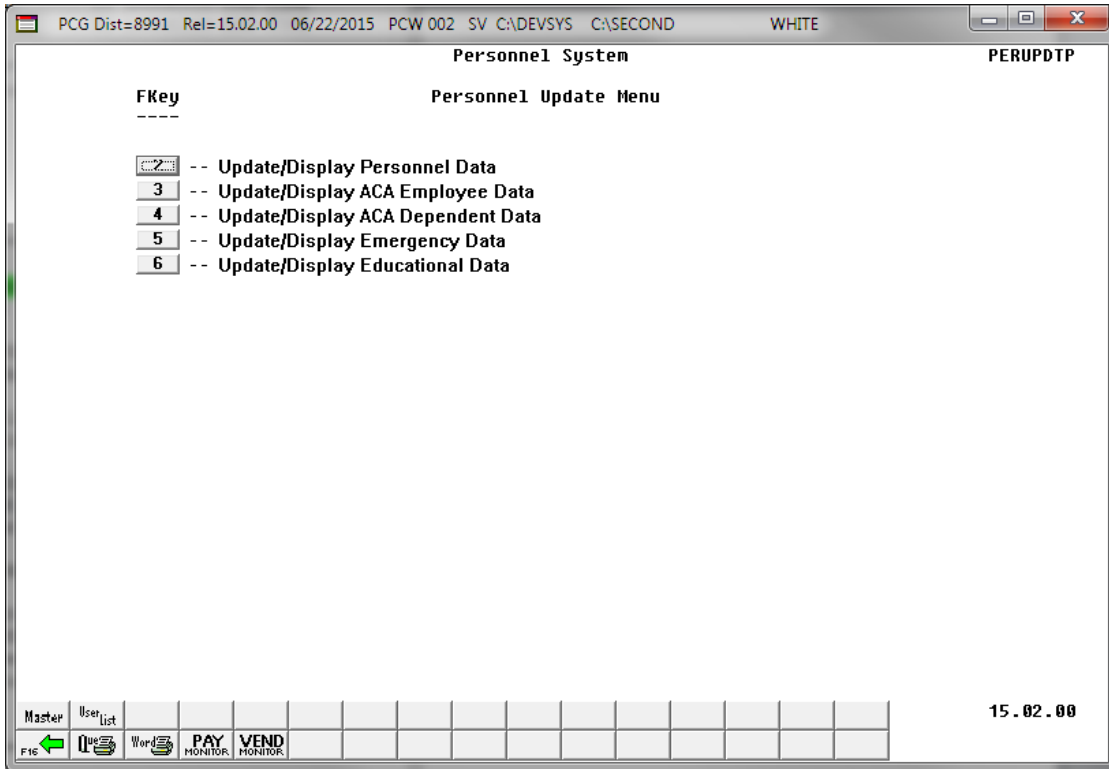
## Procedure E: Update/Display Emergency Data

| Step | Action   |
|------|--|
| 1    | From the <i>Business Applications Master Menu</i> , select <b>3</b> (F3 - Personnel System). |



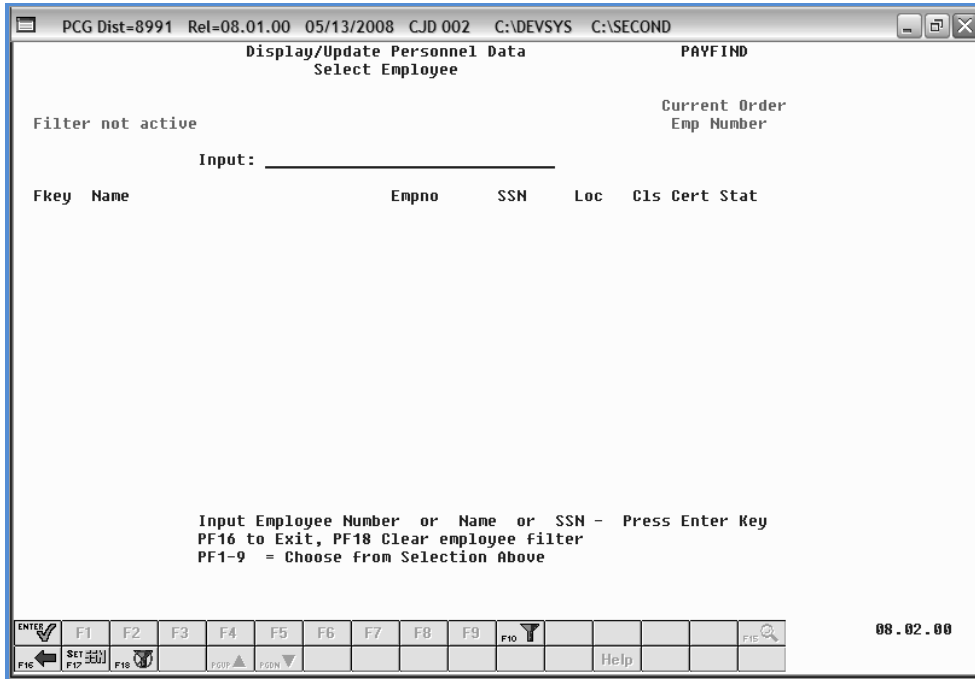
| Step | Action   |
|------|--|
| 2    | Select <b>F1</b> (F1 - Personnel Update Menu). |


The following screen displays:



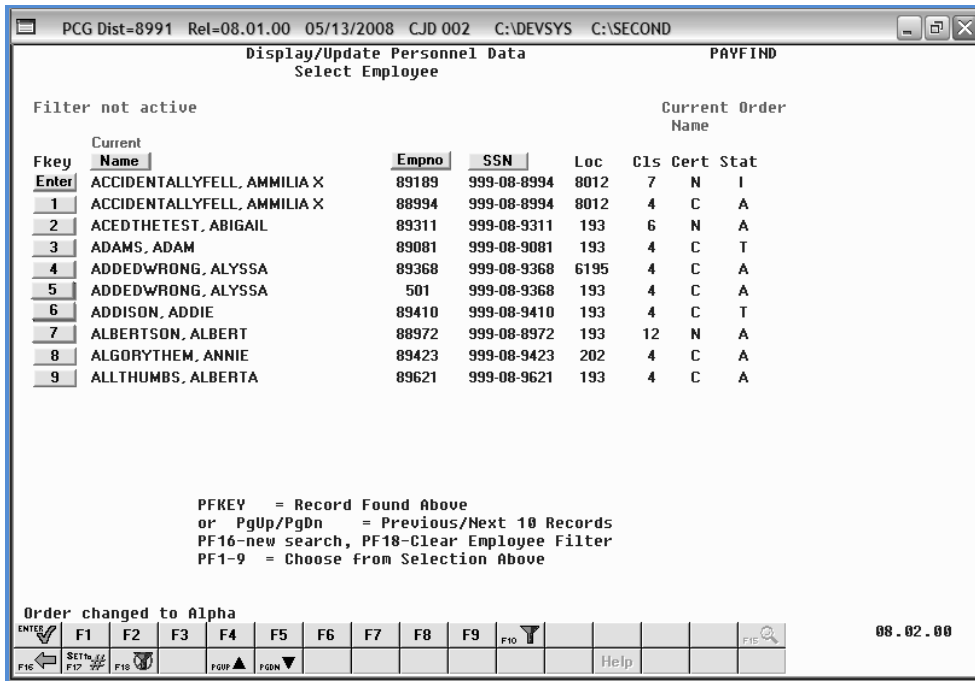
| Step | Action  |
|------|---|
| 3    | Select <b>5</b> (F5 – Update/Display Emergency Data). |




The following screen displays:



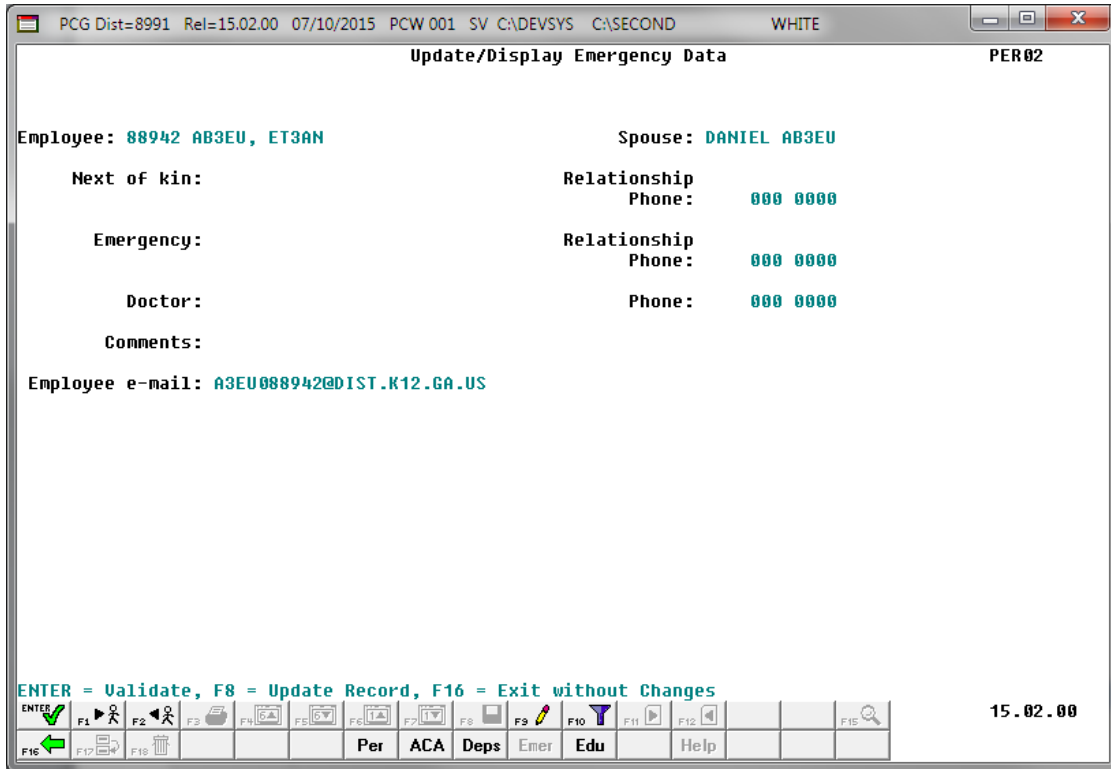
| Step | Action   |
|------|--|
| 4    | <p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 6</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and 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 5.</i></p> |


The following screen displays:



| Step | Action   |
|------|--|
| 5    | <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> |



The following screen displays:



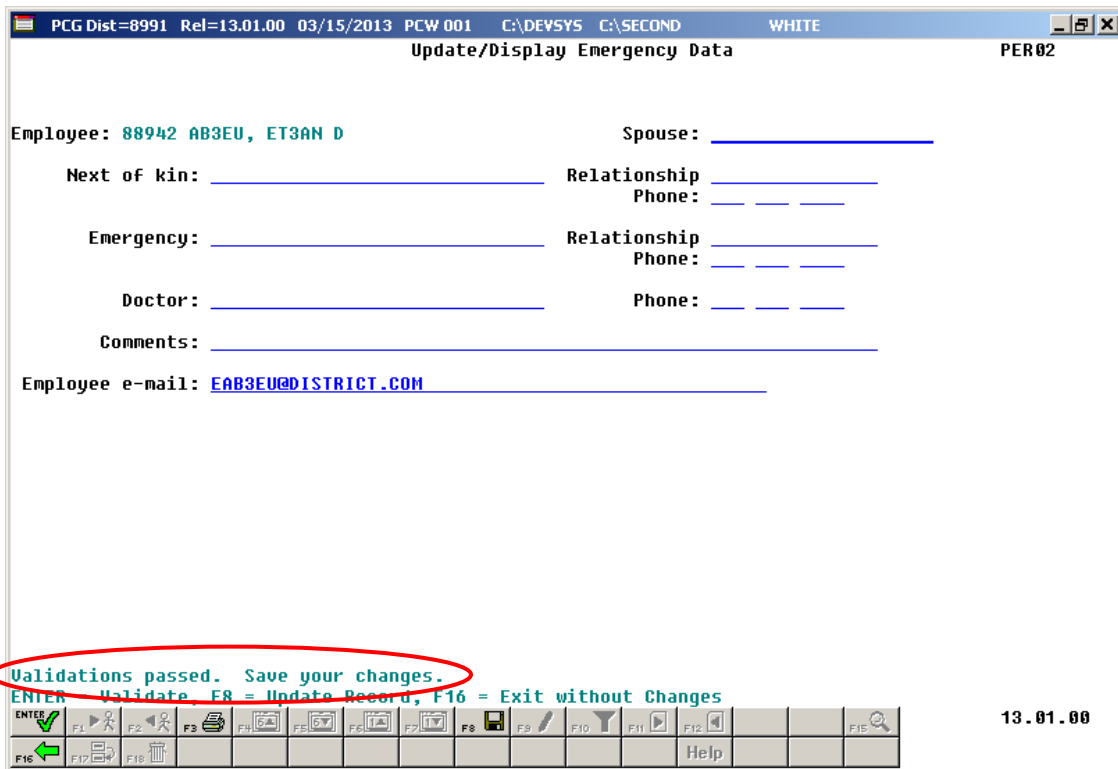
| Step | Action   |
|------|--|
| 6    | Select  (F9 – Switch to Update Mode). |


The following screen displays:

| Step | Action   |
|------|--|
| 7    | Verify “Mode changed to update” displays.<br><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 of 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> |
| 8    | Enter the spouse’s name in the <b>Spouse</b> field.  |
| 9    | Enter the name of a next of kin in the <b>Next of kin</b> field.   |
| 10   | Enter the relationship of the next of kin in the <b>Relationship</b> field.  |
| 11   | Enter the phone number for the next of kin in the <b>Phone</b> field.  |
| 12   | Enter the name of someone who should be contacted in case of emergency in the <b>Emergency</b> field.  |
| 13   | Enter the relationship of the emergency contact in the <b>Relationship</b> field.  |
| 14   | Enter the phone number for the emergency contact in the <b>Phone</b> field.  |
| 15   | Enter the name of name of the employee's doctor in the <b>Doctor</b> field.  |

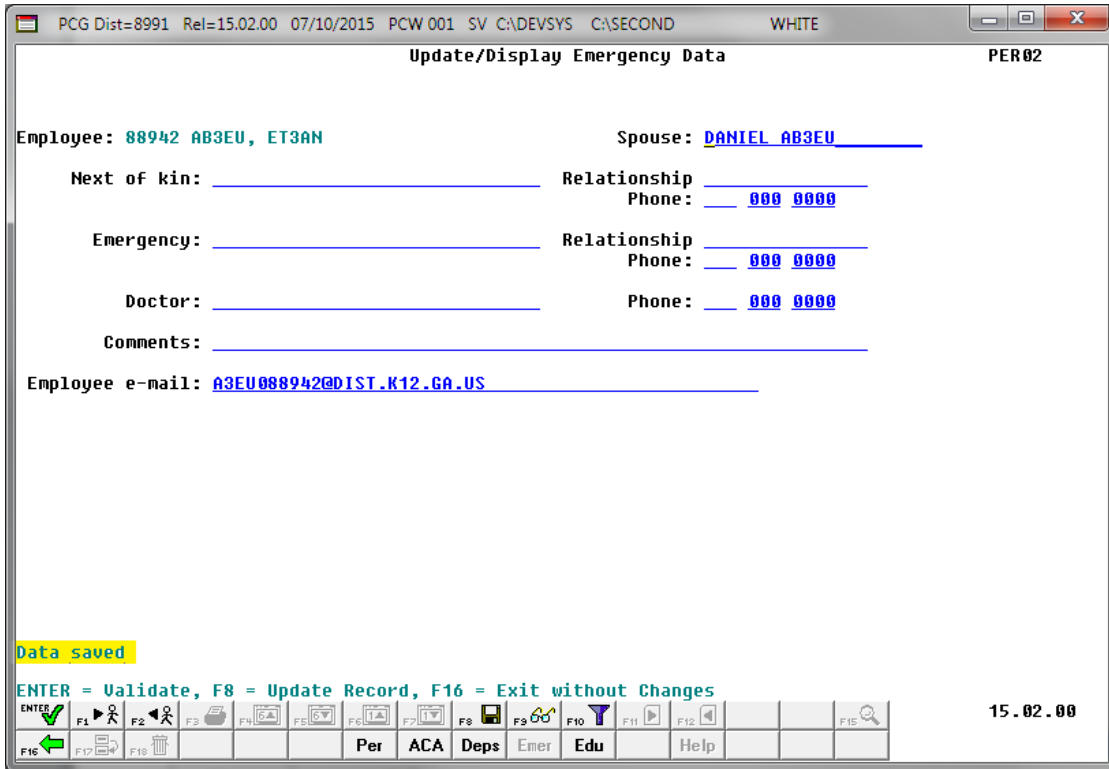
| Step | Action  |
|------|---|
| 16   | Enter the phone number for the employee’s doctor in the <b>Phone</b> field.   |
| 17   | Enter any desired comments in the <b>Comments</b> field.  |
| 18   | Enter the employee’s e-mail address in the <b>Employee e-mail</b> field. The e-mail address must contain one ‘@’ sign.  |
| 19   | Select  ( <b>Enter</b> ).<br><br>Select  ( <b>F3</b> – Print this data) to obtain a screen print of the <i>Update/Display Emergency Data</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’. |


The following screen displays:



| Step | Action  |
|------|---|
| 20   | Verify “ <i>Validations passed. Save your changes.</i> ” displays and select  ( <b>F8</b> – Save changes). |

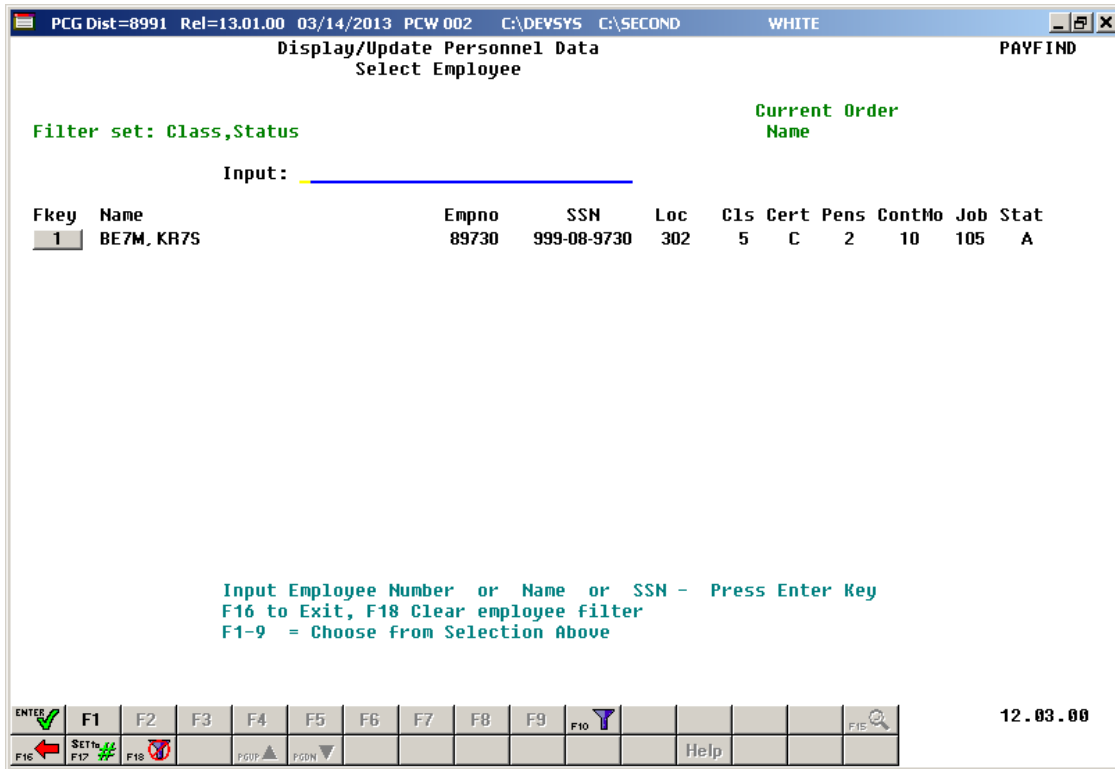
The following screen displays:




| Step | Action   |
|------|--|
| 21   | Verify “Data saved” displays, and select  (F16 – Exit) to the <i>Display/Update Emergency Data - Select Employee</i> screen. |

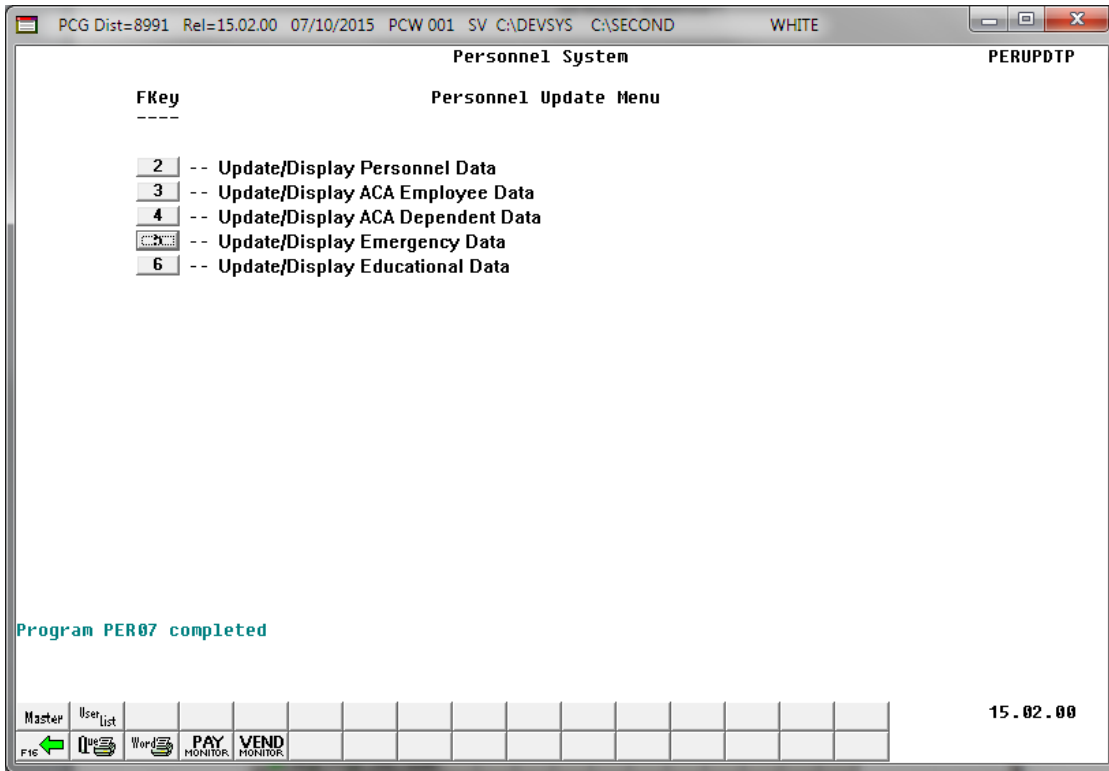




The following screen displays:



| Step | Action   |
|------|--|
| 22   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |

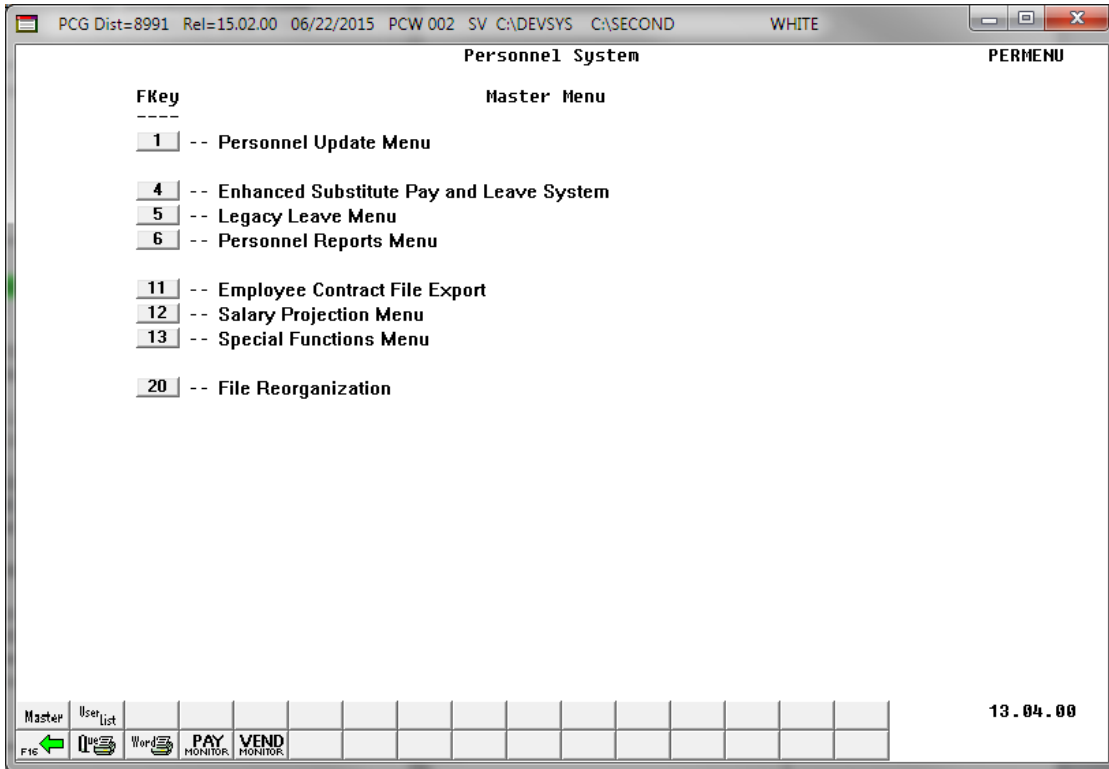
The following screen displays:



| Step | Action  |
|------|---|
| 23   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |

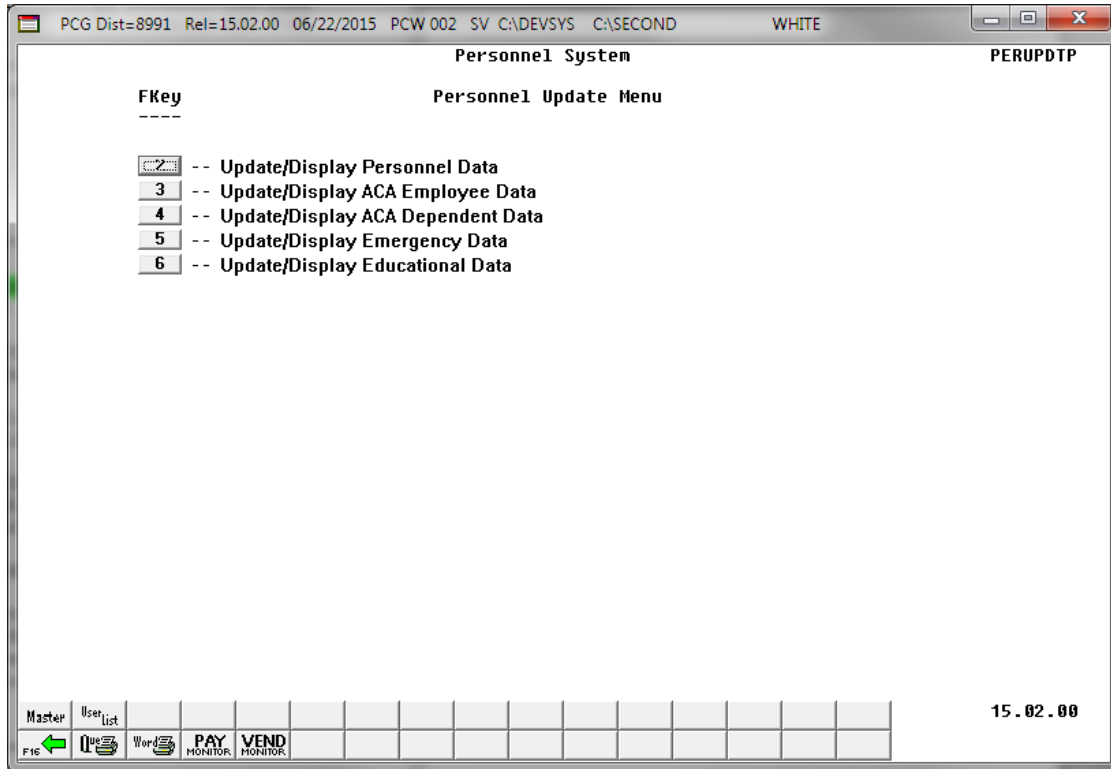
## Procedure F: Update/Display Educational Data

| Step | Action   |
|------|--|
| 1    | From the <i>Business Applications Master Menu</i> , select <b>3</b> (F3 - Personnel System). |



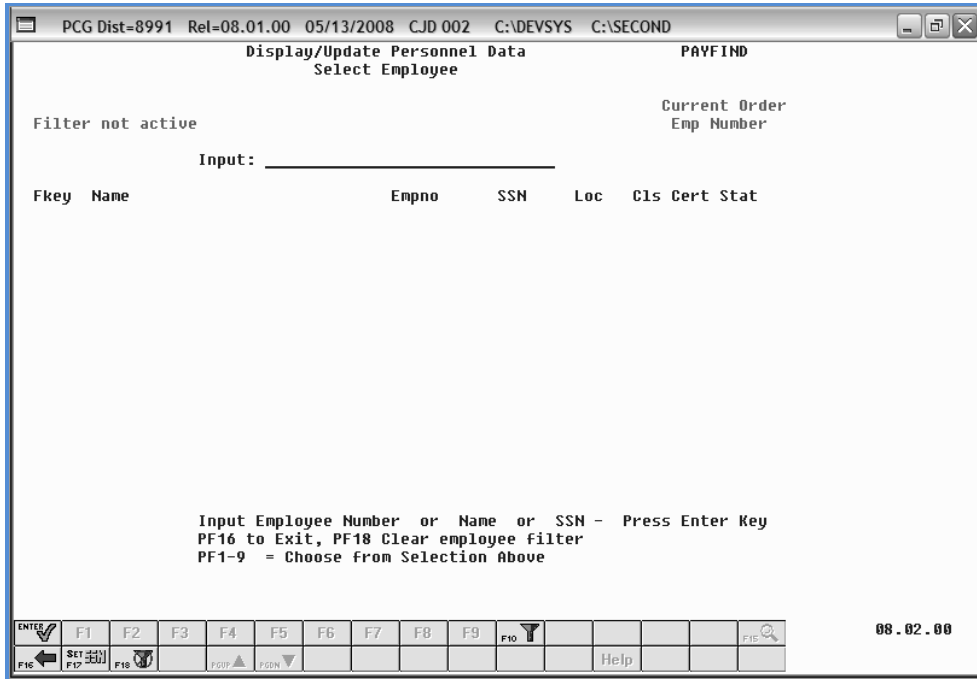
| Step | Action   |
|------|--|
| 2    | Select <b>F1</b> (F1 - Personnel Update Menu). |


The following screen displays:



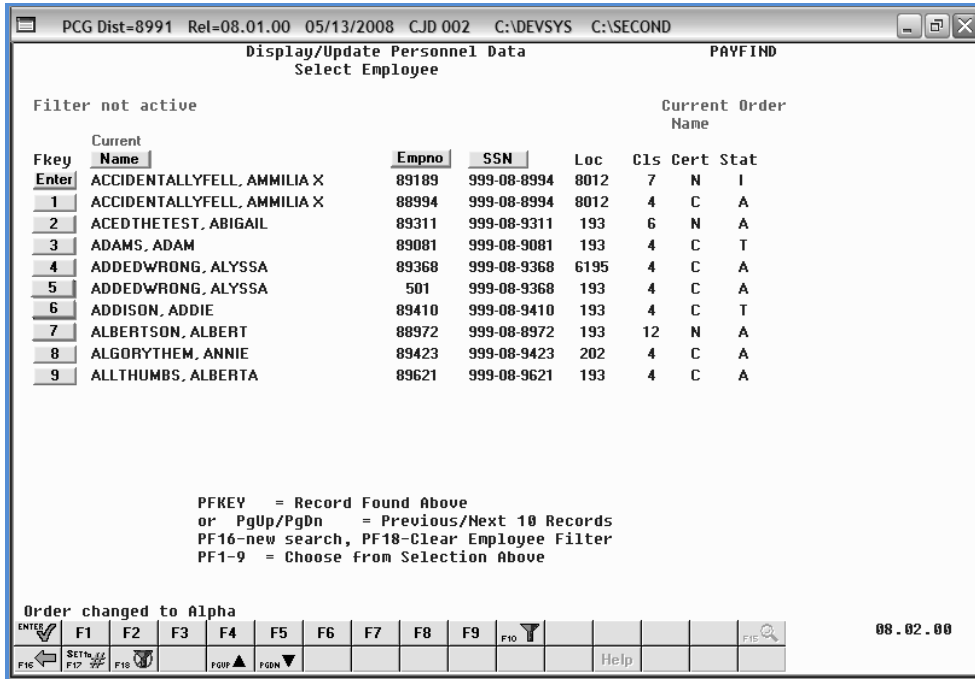
| Step | Action  |
|------|---|
| 3    | Select <b>[6]</b> (F6 – Update/Display Educational Data). |




The following screen displays:



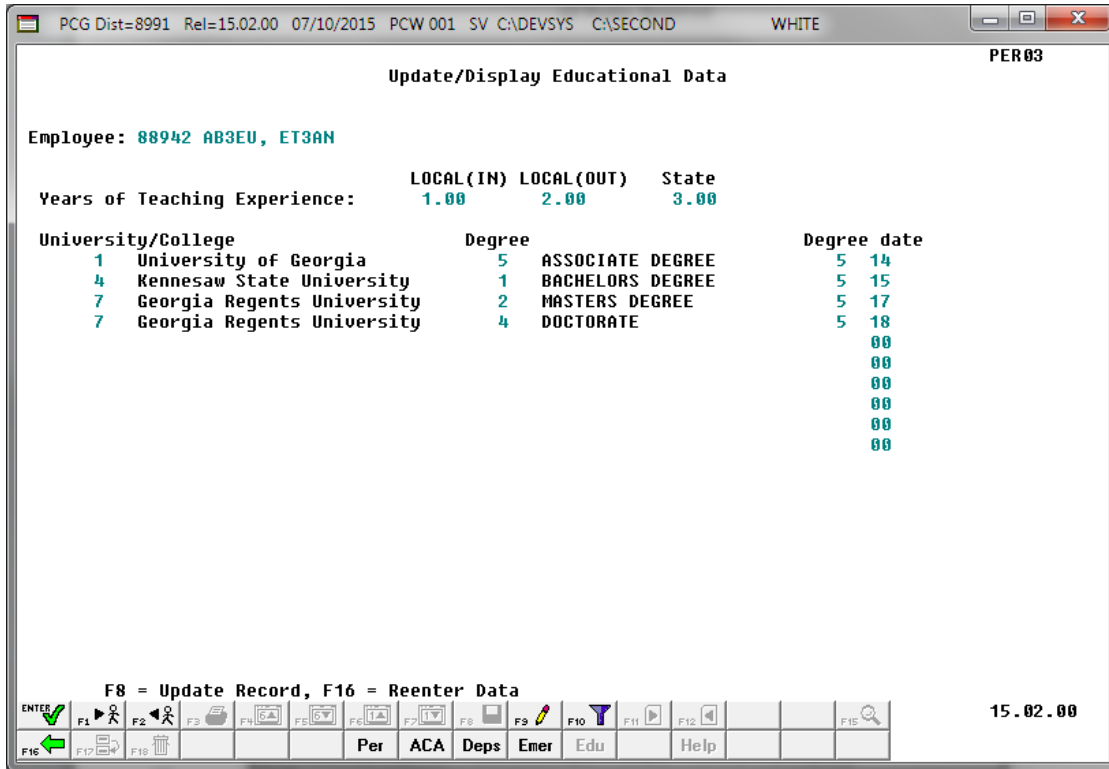
| Step | Action   |
|------|--|
| 4    | <p>Enter the number in the <b>Input</b> field, select  (<b>Enter</b> - Continue), and proceed to <i>Step 6</i>.</p> <p><i>If the employee number is unknown, enter the employee's complete or partial name, or the Social Security Number in the "Input" field, and 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 5.</i></p> |

The following screen displays:



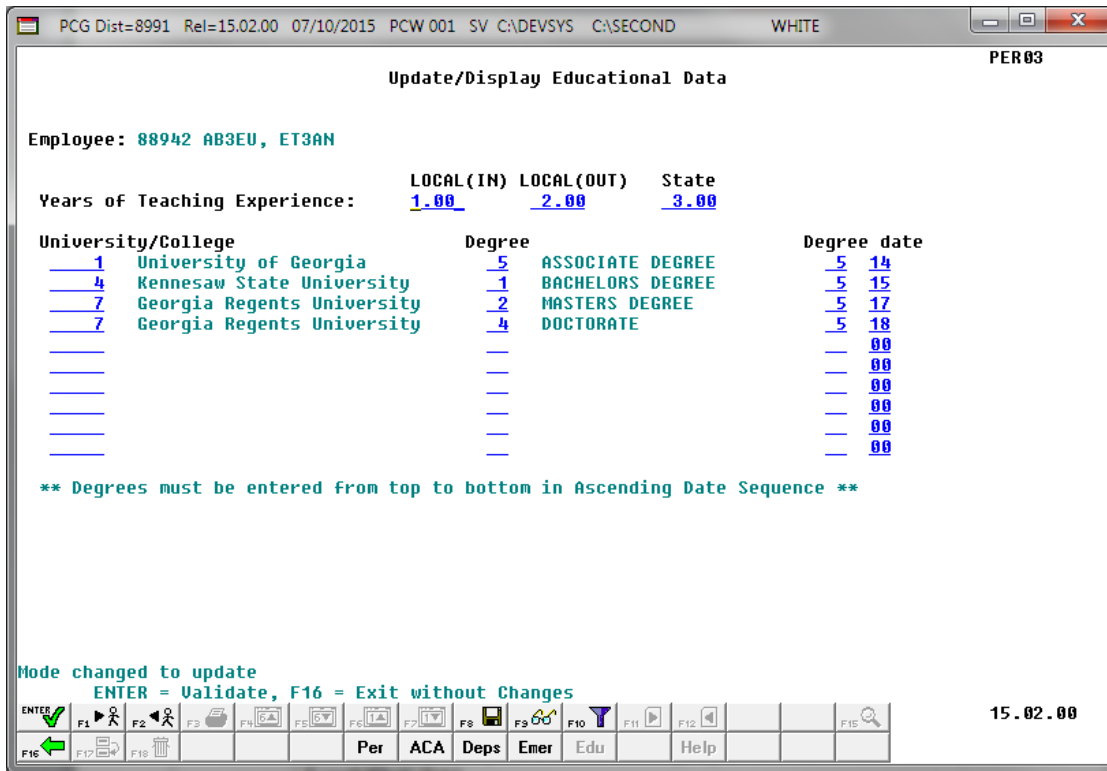
| Step | Action   |
|------|--|
| 5    | <p>Select <b>Enter</b> (Enter) or select the <b>Function key</b> corresponding to the employee's record, and select  (Enter).</p> <p>To sort by Name: Select <b>Name</b> (Name).</p> <p>To sort by Employee Number: Select <b>Empno</b> (Empno).</p> <p>To sort by Social 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> |


The following screen displays:






| Step | Action   |
|------|--|
| 6    | Select  (F9 – Switch to Update Mode). |

The following screen displays:

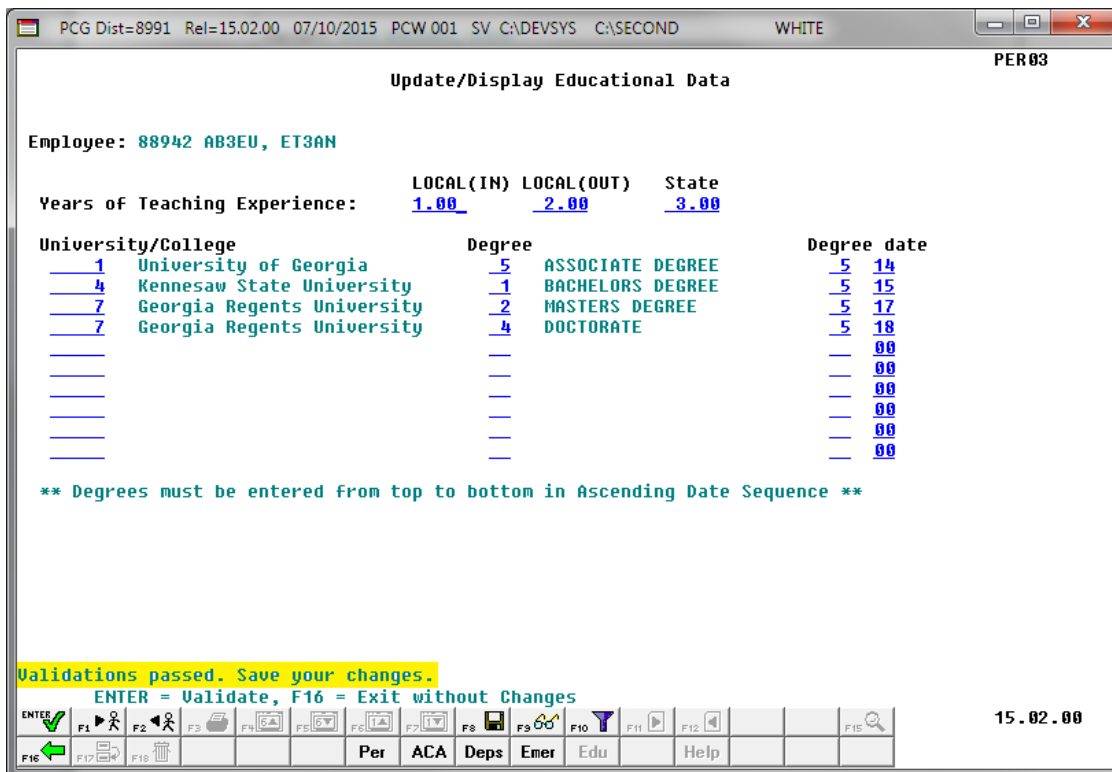



| Step  | Action   |
|---|--|
| 7   | Verify "Mode changed to update" displays.<br><br><i>Although these instructions refer primarily to the entry of information, if the fields already contain information, or are automatically populated with information during the selection of a PF key, verify the fields' entries are correct for the employee. If the information is incorrect, make the appropriate modifications to the field entries.</i> |
| 8   | Enter the number of years of local teaching experience within the school system in the <b>Local (In)</b> field.  |
| 9   | Enter the number of years of local teaching experience outside the school system in the <b>Local (Out)</b> field.  |
| 10  | Enter number of years of state teaching experience (excluding local) in the <b>State</b> field.  |
| <b>Complete Steps 11 - 14 for each University/College entered in Step 11.</b> |  |
| 11  | Enter the code or select the drop-down selection icon  of a university or college attended in the <b>University/College</b> field. This code must match a type "U" record in the <i>Payroll Description File</i> .  |



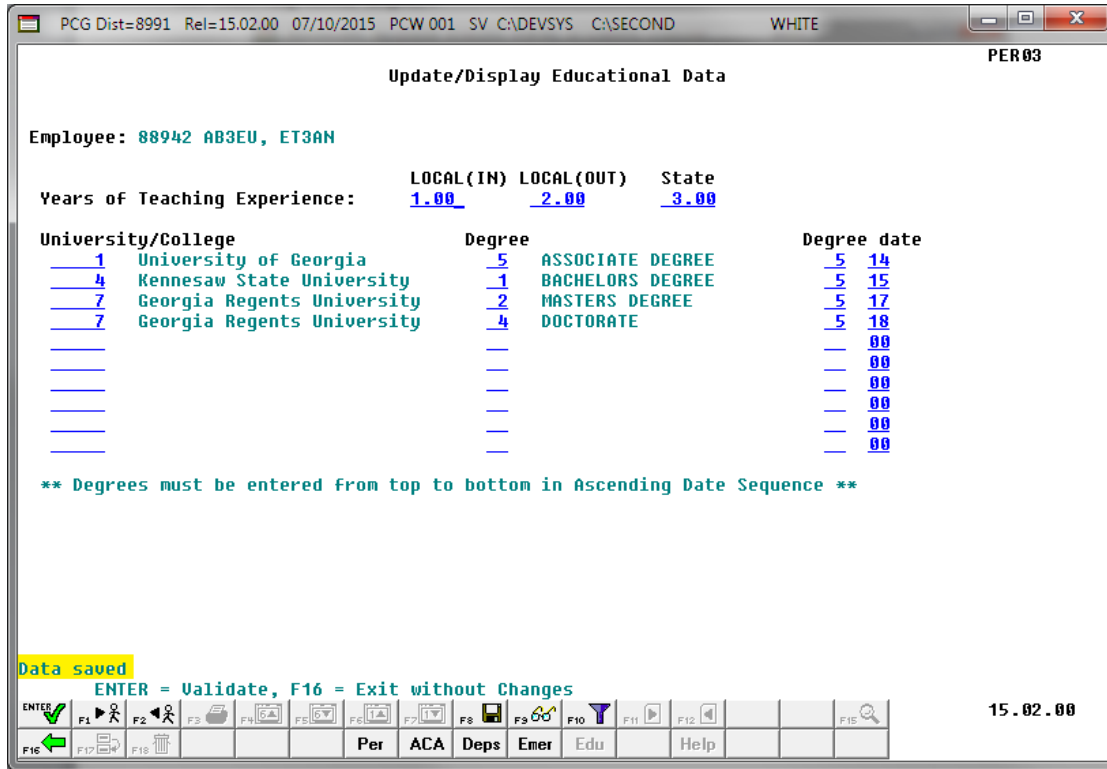
| Step | Action  |
|------|---|
| 12   | Enter the code or select the drop-down selection icon  of a degree earned at the associated University/College in the <b>Degree</b> field. This code must match a type "D" record in the <i>Payroll Description File</i> .   |
| 13   | Enter the date (month and year) the degree was conferred from the associated university or college in the <b>Degree Date</b> field.   |
| 14   | <u>If there are additional University/College degrees:</u> Select the Tab key to access the next <b>University/College</b> field and repeat this procedure at <i>Step 11</i> .  |
| 15   | Select  ( <b>Enter</b> ).<br><br>Select  ( <b>F3</b> – Print this data) to obtain a screen print of the <i>Update/Display Educational Data</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’. |


The following screen displays:



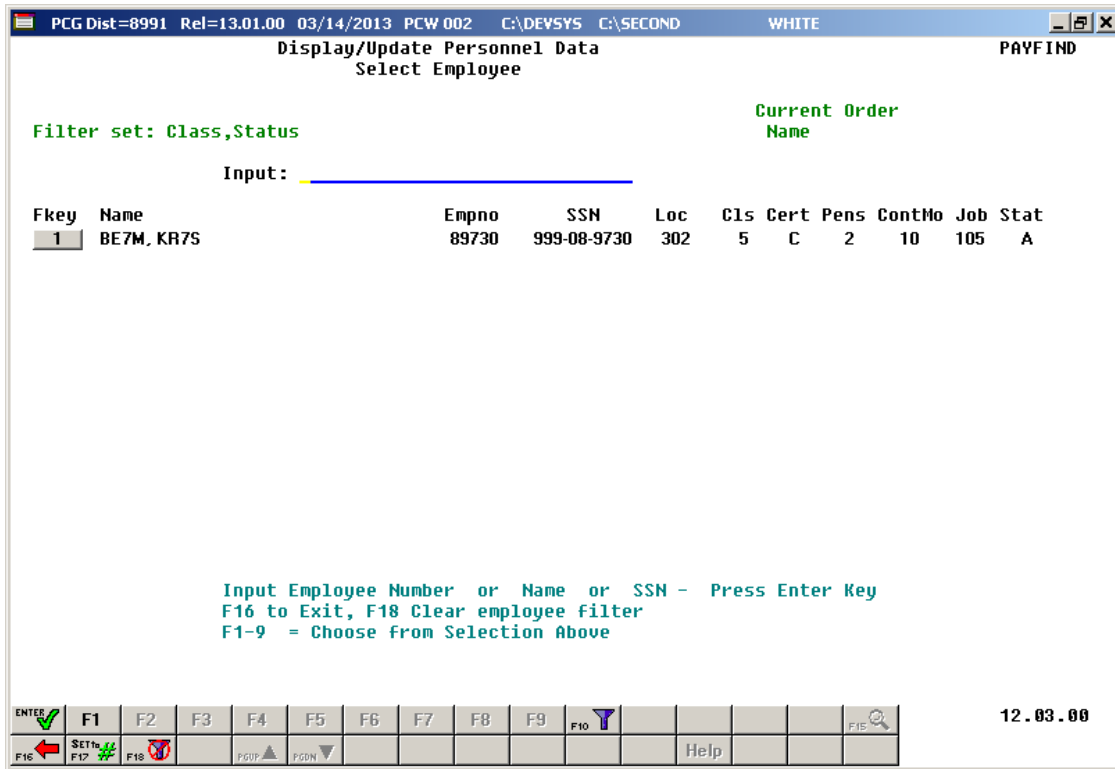
| Step | Action  |
|------|---|
| 16   | Verify “ <i>Validations passed. Save your changes.</i> ” displays and select  ( <b>F8</b> – Save changes). |


The following screen displays:



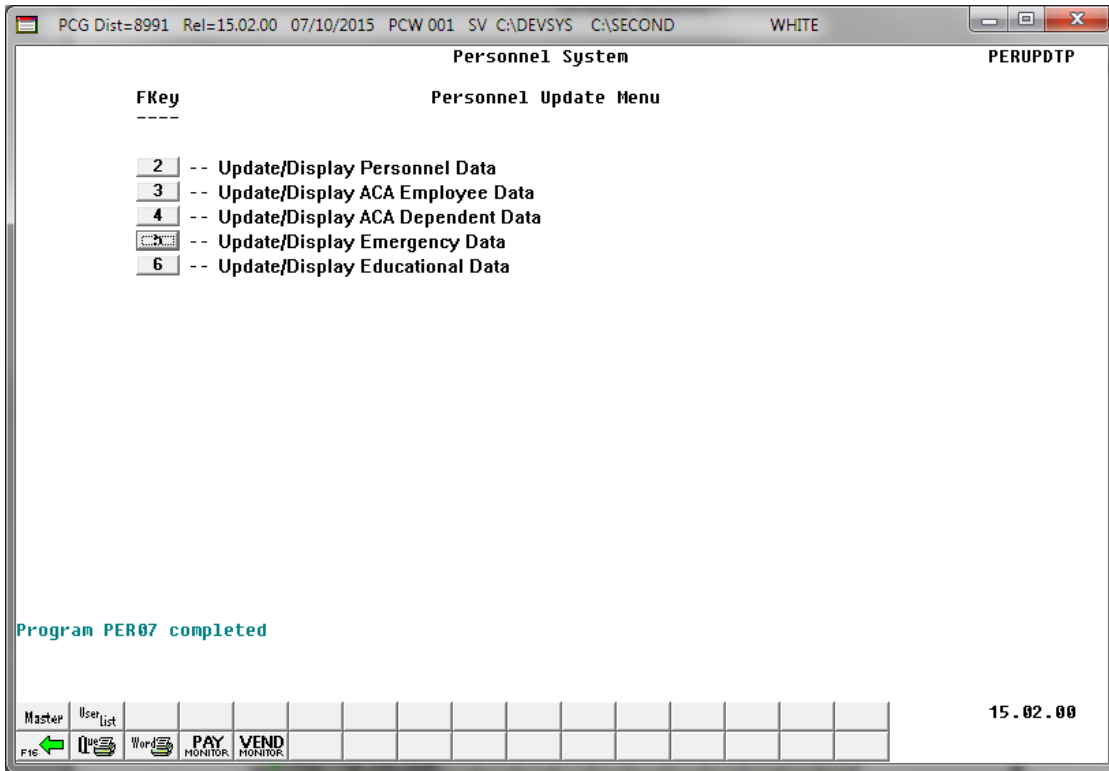
| Step | Action   |
|------|--|
| 17   | Verify "Data saved" displays, and select  (F16 – Exit) to the <i>Display/Update Educational Data - Select Employee</i> screen. |



The following screen displays:



| Step | Action   |
|------|--|
| 18   | Select  (F16 – Exit) to return to the <i>Personnel System – Personnel Update Menu</i> . |

The following screen displays:



| Step | Action  |
|------|---|
| 19   | Select  (F16 - Exit) to return to the <i>Personnel System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> . |