



# PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

8/8/2019

Section B: Payroll Update Processing

***[Topic 1: Set/Clear Employee Search  
Criteria, V2.5]***

## Revision History

Date	Version	Description	Author
8/8/2019	2.5	19.02.00 – Update <i>Set Employee Selection Filter</i> screen.	D. Ochala
06/07/2016	2.4	16.01.00 – Update DOE logo and Footers.	S. Scrivens
01/07/2014	2.3	13.04.00 – Update DOE logo and screenshots.	D. Ochala
10/01/2010	2.2	10.03.00 – Added contract months filter information and instructions.	D. Ochala
06/17/2009	2.1	09.02.00 – Added pension code filter information and instructions.	C. W. Jones
06/12/2008	2.0	08.02.00 – Updated procedures, and included modified <i>Select Employee</i> screenshot example.	C. W. Jones

# *Table of Contents*



<b>Overview .....</b>	<b>1</b>
<b>Procedure A: Setting Employee Search Criteria .....</b>	<b>3</b>
<b>Procedure B: Clearing Employee Search Criteria .....</b>	<b>7</b>
<b>Procedure C: Employee Lookup Sort Criteria .....</b>	<b>11</b>


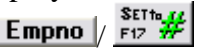

## Overview



The employee *Search Criteria* filter and the online display of selected employees within the *Payroll/Personnel Data* and the *Employee Master Summary Listing* modules allow user-defined settings to determine how PCGenesis displays the results. When PCGenesis users set the filter for individual employee information, PCGenesis creates a list of employees who match the selection criteria. This facilitates locating specific employees for display or editing purposes. In the case of the *Employee Master Summary Listing*, defining the search criteria determines which employees are selected for report processing.







**It is very important to note that PCGenesis retains, in memory, the employee filter selections for the life of the user's session.** For example, the employee filter selections defined for selecting employees on the *Display/Update Withholding Data* screen will be retained, and when the user enters the *Employee Master Summary Listing* module, these settings will also be the default employee filter settings for the report listing.

**Setting/Clearing Employee Search Criteria:** The search filters may be set to display the results by *Status, Pension Code, Contract Months, Certified or Classified employees, 13-Month employees, Class Code, Work Location, Job Code*, and/or *CS1 Job codes*. While entering more than one code in different fields will limit the search results displayed, entering more than one code in the same field will broaden the search results. For example, a search for *Active* employees (Status – A), generates results for all active employees. With an additional entry such as a *Job Code 101 (Grade One Teacher)*, only the results for active, first grade teachers display. Adding a second *Job Code 102 (Grade Two Teacher)* will broaden the results to include all active first and second grade teachers. Although the use of this feature is not mandatory, unless activated, PCGenesis displays the results for all employees on the *Display/Update Personnel – Set Employee Selection Filter* screen.

The  (F10 – Set Employee filter/Set filter condition) allows the user to set the employee selection criteria, and the  (F18 – Clear filter condition) allows the user to clear all selection criteria so that all employees are again available for selection.

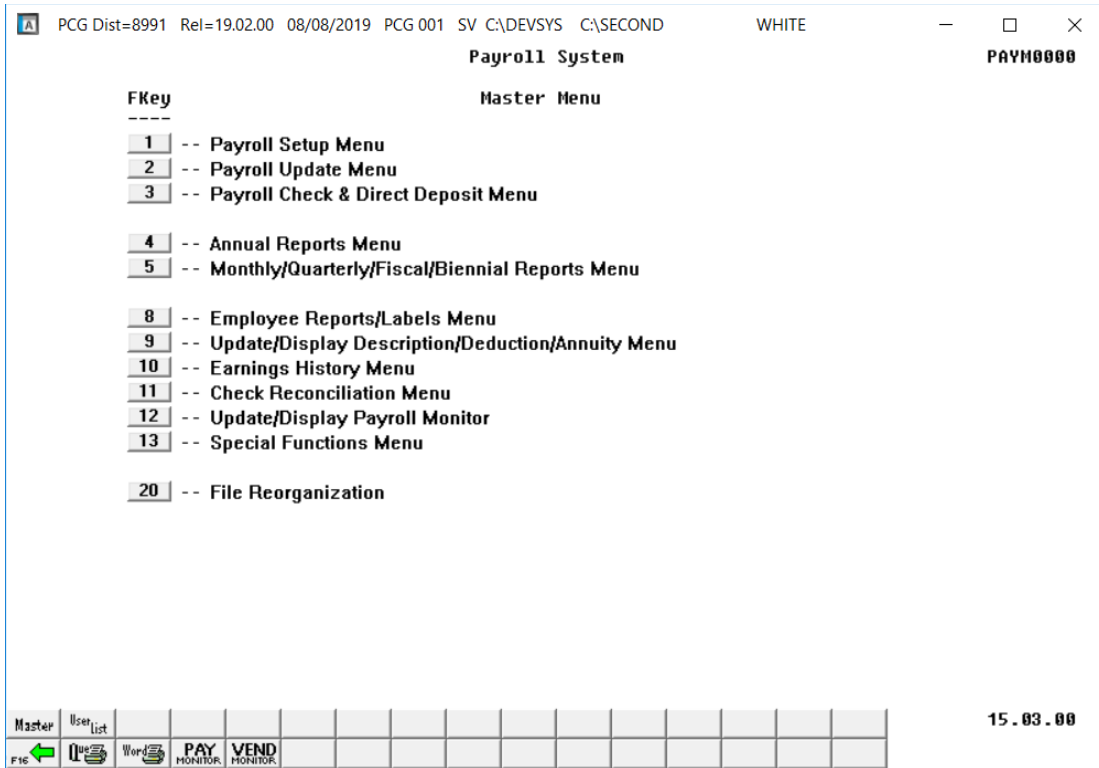
**Payroll/Personnel Data Module - Setting the Online Display Sort Order:** When activating the *Search Criteria* filter, users may also define how employee search results display online by setting a sort order such as  (by *Employee Name*),  (by *Employee Number*), or  (by *Social Security Number*).

The availability of these icons on the *Display/Update – Select Employee* screen depends upon the *Current Order* field which displays in the upper-right portion of the screen. This feature controls the display of employee information when using the  (F1 – Next employee), and  (F2 – Previous employee) options on the employee information screens.

**Employee Lookup Module:** Entering a complete or a partial name within the *Select Employee* screen's *Input* field displays employee information most closely matching the search criteria entered. Employee number (Empno) and Social Security Number (SSN) entries on the other hand, display information specific to the employee. The *PgUp/PgDn* ( *Page Up*/ *Page Down*) feature allows scrolling between records. The  (**F16** – Exit) selection allows the entry of new search criteria, and  (**F18** – Clear filter condition) clears existing filter conditions. *F1* – *F9* ( - ) on the screen allow the selection of a specific employee's information.

## Procedure A: Setting Employee Search Criteria

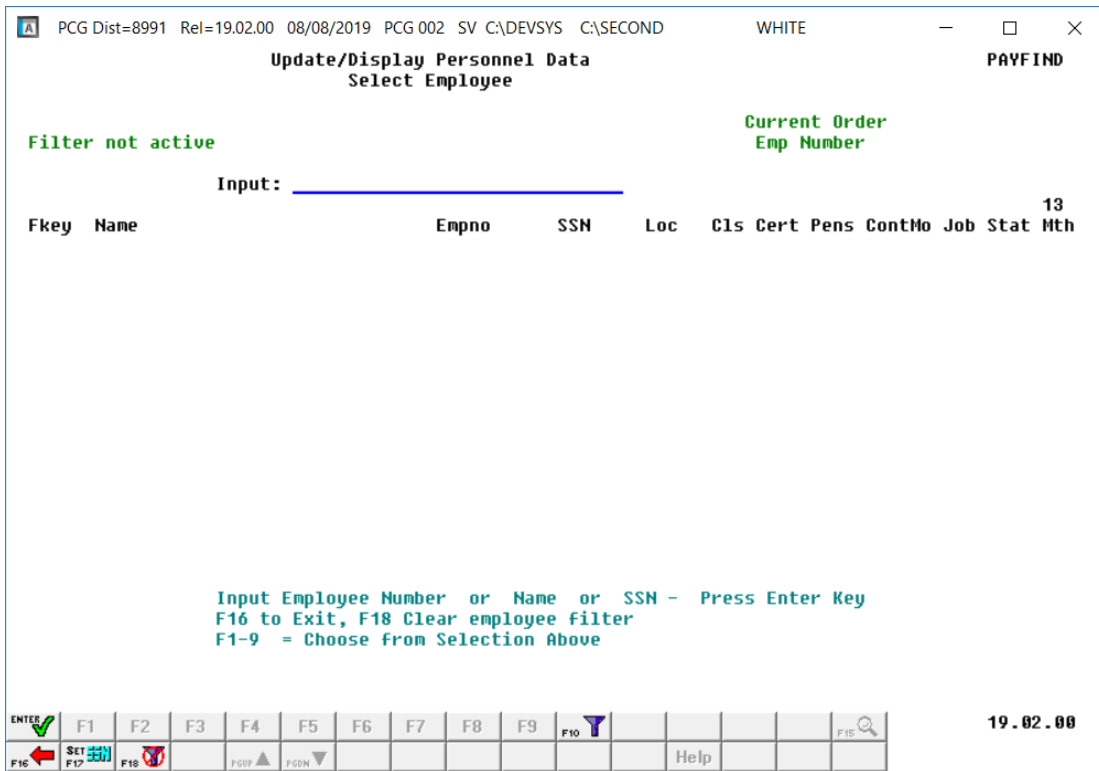
Step	Action
1	From the <i>Business Application Master Menu</i> , select <b>2</b> (F2 – Payroll System).




Although the screenshot examples display Payroll Data screenshot examples, the feature is also available within the Personnel System's employee update module.

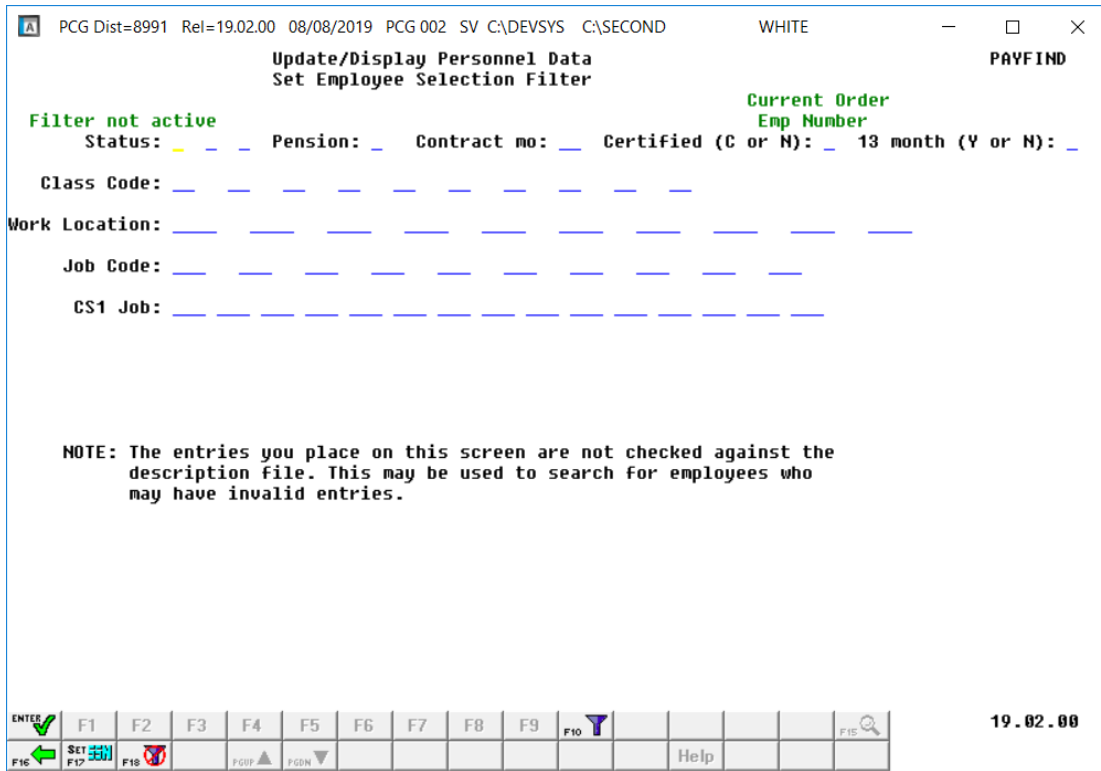
Step	Action
2	<b>Payroll Update Module:</b> Select <b>2</b> (F2 – Payroll Update Menu). <b>Employee Reports Module:</b> Select <b>8</b> (F8 – Employee Reports/Labels Menu).
3	From the <i>Payroll System – Payroll Update Menu</i> , or the <i>Payroll System – Employee Reports/Labels Menu</i> , select the appropriate option.

The following screen displays:




Step	Action
4	Select  (F10 – Set filter condition).







The following screen displays:



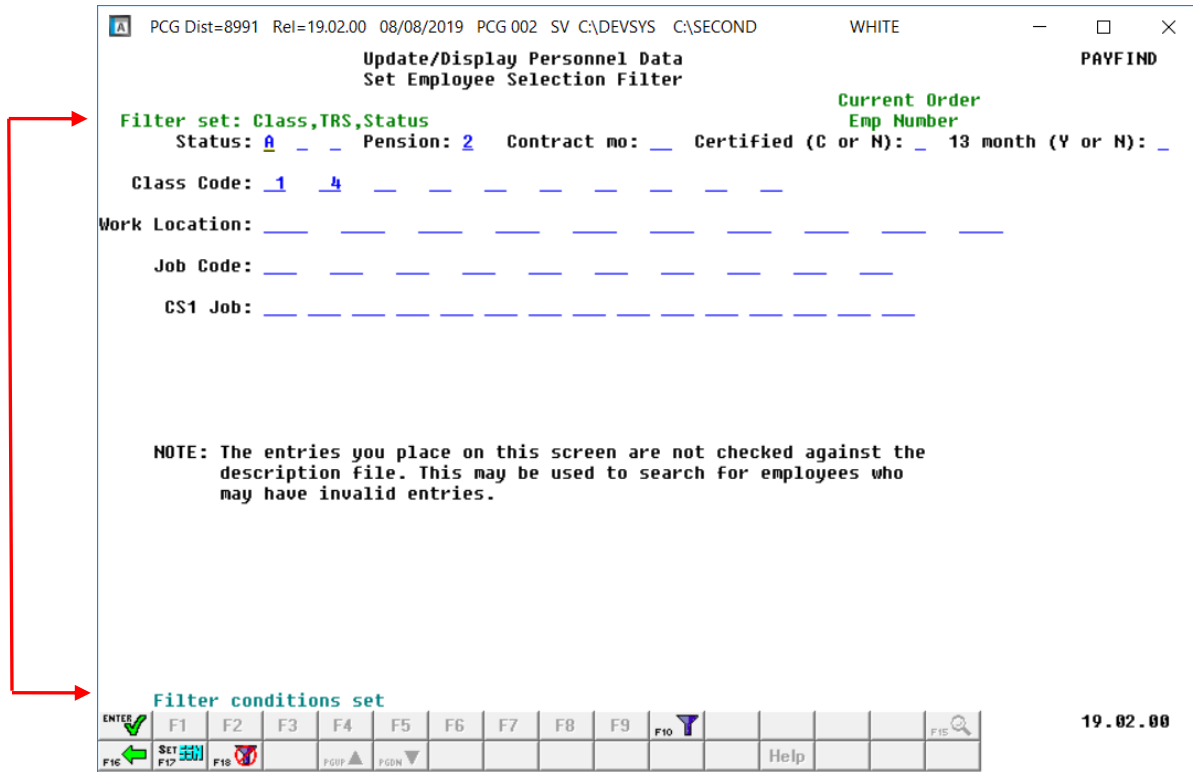
In addition to allowing a search for invalid entries, use this feature to limit the type of records displayed.

Step	Action
5	To select employees based upon their status, enter <b>A</b> (Active), <b>I</b> (Inactive) and/or <b>T</b> (Terminated) in the <b>Status</b> fields.
6	To select employees based upon their pension type, enter or select the drop-down selection icon  in the <b>Pension Code</b> field to choose the appropriate code.
7	To select employees based upon <b>Contract Mo</b> (Contract Months), enter the total number of contract months the employee <i>works</i> in order to choose the appropriate employees.
8	To select employees based upon their certified or classified employment status, enter <b>C</b> (Certified) or <b>N</b> (Non Certified/Classified) in the <b>Certified (C or N)</b> field to choose the appropriate employees.
9	Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>13 month (Y or N)</b> field to identify the inclusion or the exclusion of 13-month employees.




Step	Action
10	<b>For Class, Work Location or Job Code(s):</b> Enter or select the drop-down selection icon  in the field to choose the appropriate code and select  (Done).
11	Manually enter up to fifteen CS-1 job codes in the <b>CS1 Job</b> fields.
12	<b>Online Display Sort Order:</b> To change the sort order of employee information: Select  (F17 - Set order to SSN),  (F17 - Set order to Alpha by Name), or  (F17 - Set order to Employee Number).
13	Select  (Enter).

The following screen displays:

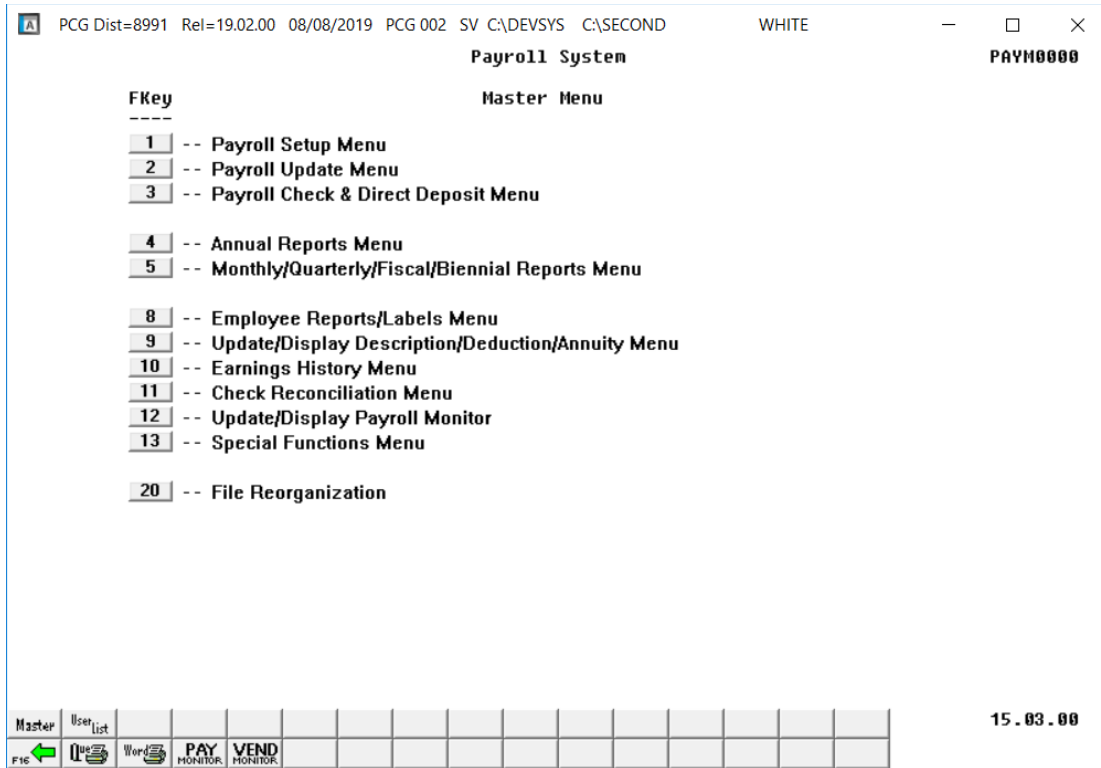


In the screenshot example, the search criteria entries for the Personnel Data module are shown. PCGenesis will retain, in memory, the employee filter selections for the life of the user's session until the user clears the selection criteria or defines a new set of selection criteria.

Step	Action
14	Verify "Filter conditions set" displays and select  (F16 - Exit) to return to the Payroll System Master Menu, or to continue processing as normal.

## Procedure B: Clearing Employee Search Criteria

Step	Action
1	From the <i>Business Application Master Menu</i> , select <b>2</b> (F2 – Payroll System).



Step	Action
2	<b>Payroll Update Module:</b> Select <b>2</b> (F2 – Payroll Update Menu). <b>Employee Reports Module:</b> Select <b>8</b> (F8 – Employee Reports/Labels Menu).
3	From the <i>Payroll System – Payroll Update Menu</i> , or the <i>Payroll System – Employee Reports/Labels Menu</i> , select the appropriate option.

The following screens display:

PCG Dist=8991 Rel=19.02.00 08/08/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE - □ ×

**Update/Display Personnel Data**  
Select Employee PAYFIND

Filter set: Class,TRS,Status Current Order Name

Input: \_\_\_\_\_

Fkey	Name	Empno	SSN	Loc	Cls	Cert	Pens	ContMo	Job	Stat	Mth
1	GA2T, CH2RLEY	89469	999-08-9469	201	1	C	2	10	8	A	13
2	FIGK, MAGRICIO	87255	999-08-7255	8010	1	C	2	10	7	A	
3	DEBATORRE, ARBELLE	87858	999-08-7858	100	1	C	2	10	3	A	
4	CA7L, AN7	89804	999-08-9804	100	1	C	2	10	2	A	
5	BA7NHART, LA7ENDRA	88511	999-08-8511	195	1	C	2	10	8	A	
6	AI9SWORTH, XA9IER	88614	999-08-8614	108	1	C	2	10	4	A	Y

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

19.02.00

ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F15 F16 F17 F18 PGUP PGDN Help

Personnel Data Module

PCG Dist=8991 Rel=19.02.00 08/08/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE - □ ×

PAY12EXT

**Employee Master Summary Listing**

Use F10 to set the selection criteria for the Employee Listing.

Filter set: Class,TRS,Status  
Report sort order: Employee number sequence

Enter an 'X' next to items to be included on the report:

Status X	Pay Sched.# X	Pay Type X
Location X	Contr Amt X	Account X
Class X	Birth Date -	Term Reason -
Soc Sec# X	Address -	Term Date -
Hire Date X	Phone No -	ReHire Date -
FICA SW -		




NOTE: FICA SW will also accept 'Y' or 'M' or 'N' and will  
ONLY INCLUDE Employees with that FICA SW value.

F10=Employee Selection, F16=Exit Without Printing

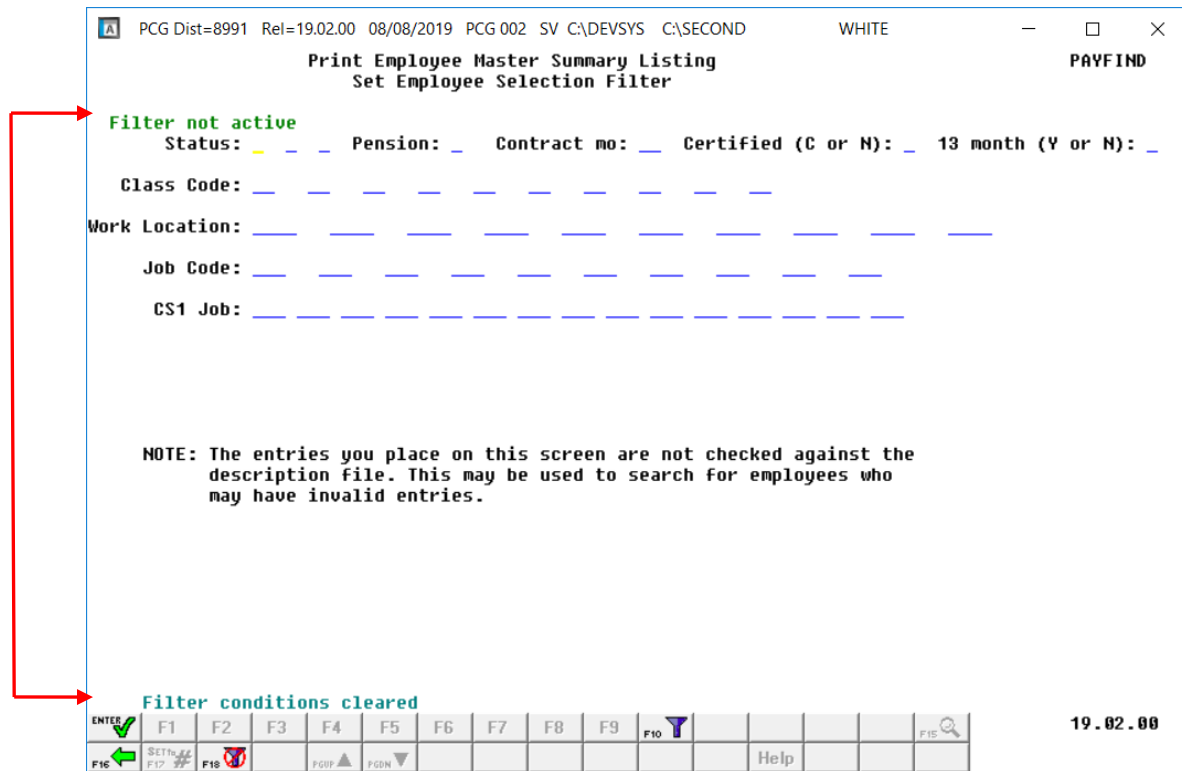
17.01.00

ENTER ✓ F1 F2 F10 F16 F17 F18 PGUP PGDN Help

Employee Master Summary Listing Module

Step	Action
4	<p><b>Payroll/Personnel Data Module:</b> Select  (F18 – Clear filter condition).</p> <p><b>Employee Reports Module:</b> Select  (F10 – Set filter condition), and  (F18 – Clear filter condition).</p>

The following screens display:



Employee Master Summary Listing Module

PCG Dist=8991 Rel=19.02.00 08/08/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE - □ ×

**Update/Display Personnel Data**  
Select Employee PAYFIND

Filter not active Current Order Name

Input: \_\_\_\_\_




Fkey	Name	Empno	SSN	Loc	Cls	Cert	Pens	ContMo	Job	Stat	Mth
1	GA2T, CH2RLEY	89469	999-08-9469	201	1	C	2	10	8	A	13
2	F16K, MAGRICIO	87255	999-08-7255	8010	1	C	2	10	7	A	
3	DE8ATORRE, AR8ELLE	87858	999-08-7858	100	1	C	2	10	3	A	
4	CA7L, AN7	89804	999-08-9804	100	1	C	2	10	2	A	
5	BA7NHART, LA7ENDRA	88511	999-08-8511	195	1	C	2	10	8	A	
6	AI9SWORTH, XA9IER	88614	999-08-8614	108	1	C	2	10	4	A	Y

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

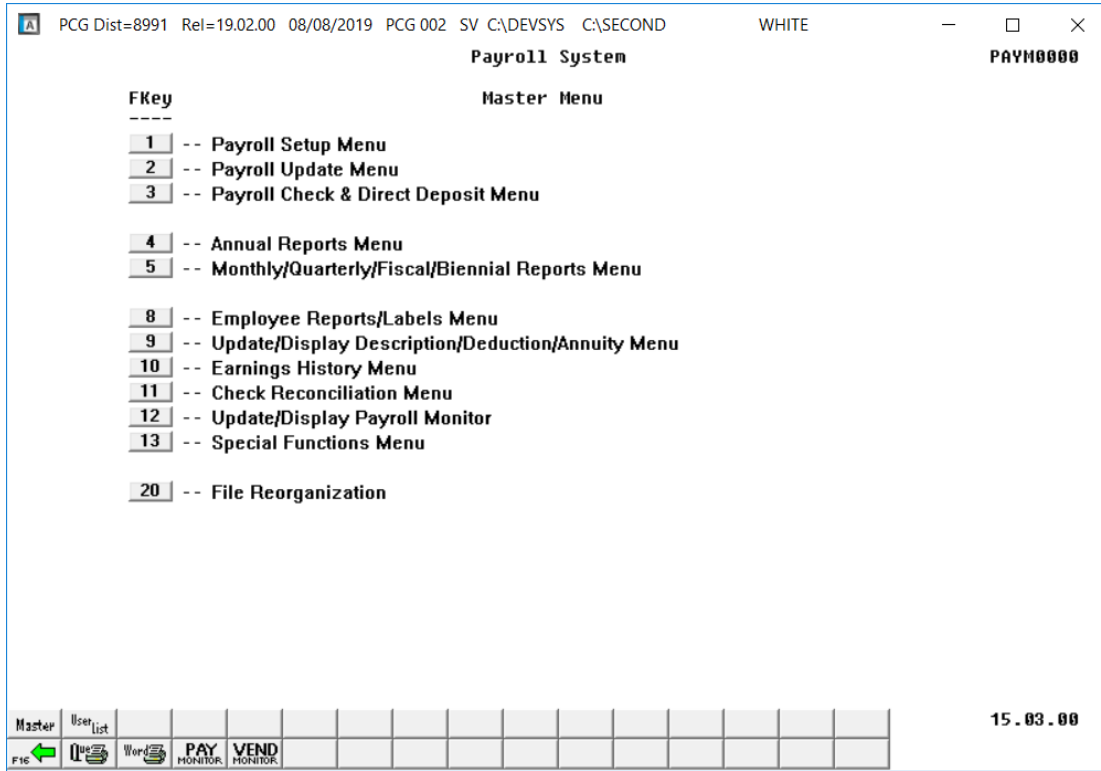
Filter conditions cleared

ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F15 F16 F17 F18 PGUP PGDN Help 19.02.00

Personnel Data Module

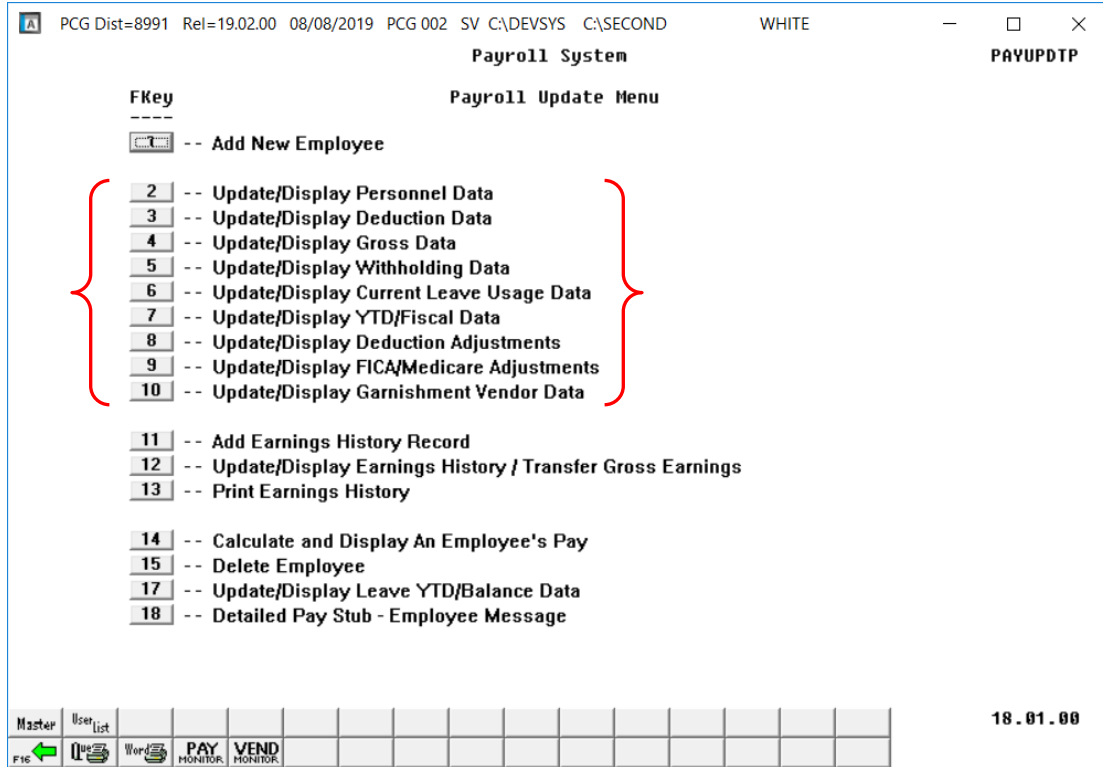
Step	Action
5	Continue to select  /  (F16 - Exit) to the <i>Payroll System Master Menu</i> , or when displayed, select  (Master) to return to the <i>Business Applications Master Menu</i> .

## Procedure C: Employee Lookup Sort Criteria



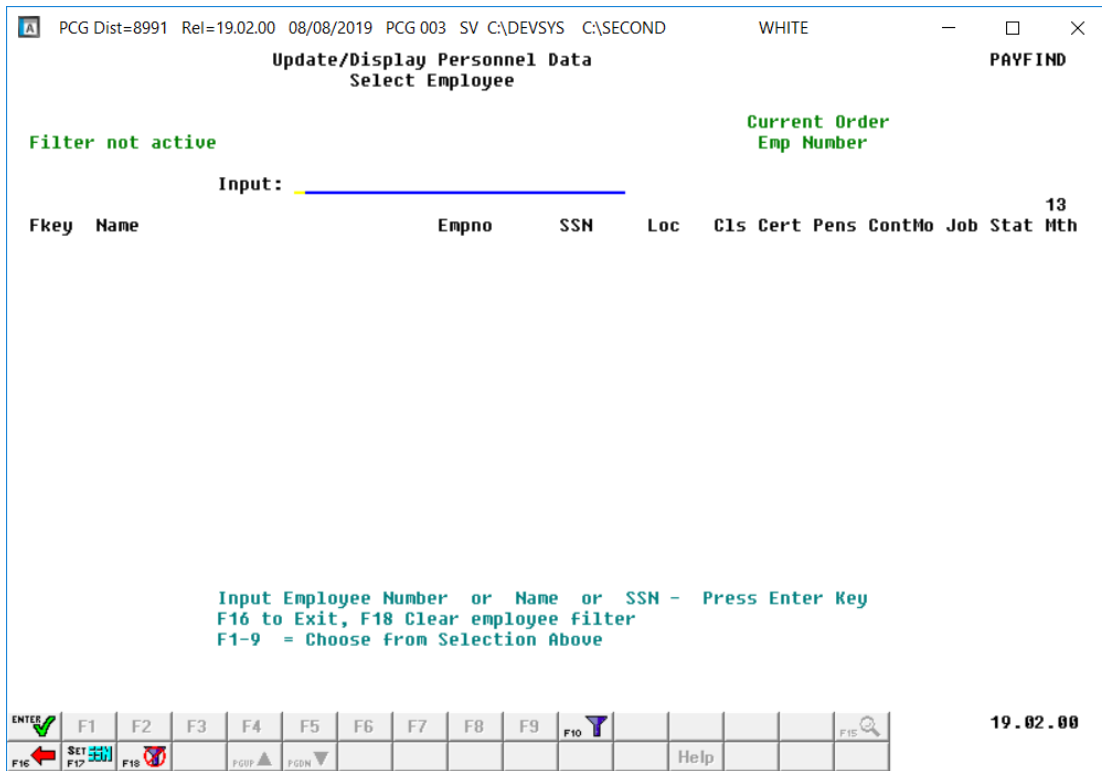
Step	Action
1	Select <b>2</b> (F2 – Payroll Update Menu).


The following screen displays:



Step	Action
2	Select the appropriate <i>Function key</i> <b>2</b> (F2) through <b>10</b> (F10).

The following screen displays:



Step	Action
3	Enter a complete or partial name in the <b>Input</b> field and select  ( <b>Enter</b> ).



The following screen displays:

As a user selects the *Name*, *Empno*, or the *SSN* button, the icon within the button bar at the bottom also changes.

**Select**      **Button Bar**  
**Icon Changes To**

**Name**      SET to F17

**Empno**      SET to F17

**SSN**      SET to F17

Fkey	Name	Empno	SSN	Loc	Cls	Cert	Pens	ContMo	Job Stat	Mth
Enter	AB3EU, ET3AN	88942	999-08-8942	103	7	C	2	10	100	T
1	AB3EU, M03TY	87742	999-08-7742	9999	24	N	0		999	I
2	AB4EY, LE4NARDO	87893	999-08-7893	8013	7	C	2	10	121	T
3	AB4EY, LI4LIAM	89093	999-08-9093	106	7	C	2	10	108	T
4	AC9ER, M09AMMED	89320	999-08-9320	8012	17	N	1	10	461	T
5	AC9ER, NU9IA	88120	999-08-8120	186	7	C	2	10	102	T
6	AD2ER, TA2	88127	999-08-8127	198	20	N	2	10	478	A
7	AD2ER, ZA2A	89327	999-08-9327	189	12	N	1	12	457	A
8	AD20CK, AL20NZO	88175	999-08-8175	198	23	N	1	12	457	T
9	AD20CK, FR2DDA	89375	999-08-9375	106	12	N	1	12	457	A

FKEY = Record Found Above  
 or PgUp/PgDn = Previous/Next 10 Records  
 F16=new search, F18-Clear Employee Filter  
 F1-9 = Choose from Selection Above

Order changed to Alpha

ENTER 13.02.00

Refer to Procedure A: Setting Employee Search Criteria for the and the icons' usage instructions.

Step	Action
4	<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>
5	To select an employee's information: Select <b>Enter</b> (ENTER) or select the appropriate <i>Function key</i> .
6	To scroll between pages: Select the PgUp/PgDn keys on the computer's keyboard or select either  (Page Up) or  (Page Down).
7	Continue to select  /  (F16 - Exit) to the <i>Payroll System Master Menu</i> , or when displayed, select  (Master) to return to the <i>Business Applications Master Menu</i> .