




# PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

3/4/2024

Section B: Payroll Update Processing

***[Topic 2: Add a New Payroll Employee  
and Hire a Third-Party Contractor  
Employee, V2.25]***

## Revision History

Date	Version	Description	Author
3/4/2024	2.25	24.01.00 – Change valid values for Georgia state tax withholding marital status.	D. Ochala
12/11/2023	2.24	23.04.00 – Add <b>Pension Code</b> value <b>6</b> for Georgia State Employees’ Pension and Savings Plan (GSEPS).	D. Ochala
09/20/2023	2.23	23.03.00 – Add new <b>Prior Year Contract Months</b> field to import file.	D. Ochala
11/18/2022	2.22	22.04.00 – Add new <b>EEO-5 Job Code, GHI E-mail Preference, Personal E-mail Address, Local Salary, Other Salary, and Background Check Date</b> fields to import file.	D. Ochala
01/09/2020	2.21	19.04.00 – Add 2020 W-4 fields.	D. Ochala
02/04/2019	2.20	19.01.00 – Update <i>Procedure D: New Employee Import Process</i> and add <b>Georgia County Code</b> field.	D. Ochala
03/19/2018	2.19	18.01.00 – Add the <b>E-mail Address</b> and <b>Cell Phone Number</b> fields.	D. Ochala
04/03/2017	2.18	17.01.00 – Add the <b>GHI BOE Transfer</b> field.	D. Ochala
12/30/2016	2.17	16.04.00 – Update <i>Procedure D: New Employee Import Process</i> and add three new fields: the <b>Hours Per Day</b> field, the <b>‘No Pension’ Code</b> field, and the <b>Sick Bank</b> field.	D. Ochala
11/04/2016	2.16	16.03.00 – Change <i>GHI Coverage Effective Date</i> to <i>GHI First Deduction Date</i> field.	D. Ochala
06/17/2016	2.15	16.02.00 – Delete <i>GHI Date of Last Deduction</i> from screen.	D. Ochala
07/15/2015	2.14	15.02.00 – Add <i>TRS &amp; ERS Pens Gross Adj</i> field back to screen. Add <i>No Pension Code</i> field.	D. Ochala
03/16/2015	2.13	14.04.00 – Update file names in <i>Procedure D New Employee Import Process</i> . Delete <i>TRS &amp; ERS Pens Gross Adj</i> field. Add <i>Substitute Rank</i> field.	D. Ochala
04/10/2014	2.12	14.01.00 – Add Budget Flag to <i>Add New Employee</i> screenshots.	D. Ochala
10/09/2013	2.11	13.03.00 – Add Hours Per Week to <i>Add New Employee</i> screenshots.	D. Ochala
07/13/2012	2.10	12.02.00 – Add <i>New PSERS</i> and <i>GHI % Distribution</i> . Add <i>Print Screen</i> information. Update screenshots.	D. Ochala
05/24/2011	2.9	11.02.00 – Add EEO-5 Job Code. Change ‘GHI Eligible Date’ to ‘GHI 1 <sup>st</sup> Day Worked’. Update screenshots.	D. Ochala
01/24/2011	2.8	10.04.01 – Remove AEIC switch from screen. Update screenshots.	D. Ochala
10/01/2010	2.7	10.03.00 – Add <i>Procedure D New Employee Import Process</i> .	D. Ochala
06/30/2010	2.6	10.02.00 – Update State Marital Status Indicator.	D. Ochala
03/31/2009	2.5	09.01.00 – Added Data Collection ethnicity code information and instructions, and <i>Procedure C: Adding a New Third Party Contractor Employee</i> .	C. W. Jones
10/02/2008	2.4	08.04.00 – Added <i>TRS-Pension Switch ‘R’</i> and <i>DOE Paid ERCON</i> field edit information and instructions.	C. W. Jones
10/02/2008	2.3	08.03.00 – Added <i>Long Term Substitute</i> information and instructions.	C. W. Jones
06/02/2008	2.2	08.02.00 – Added pension code ‘0’ (No Pension Participation) and TRS ‘R’ (TRS: Employer Pays BOTH employer and employee shares – SB327) code entry information and instructions.	C. W. Jones
03/25/2008	2.1	08.01.00 – Added <i>Annuity 3 – Annuity 5</i> information and screenshot example.	C. W. Jones
09/25/2007	2.0	07.03.00 – Added GHI option and tier drop-down selection icon  information and instructions.	C. W. Jones

# Table of Contents

<b>OVERVIEW</b> .....	<b>1</b>
<b>PROCEDURE A: SETTING/CLEARING EMPLOYEE SEARCH CRITERIA</b> .....	<b>4</b>
<b>PROCEDURE B: ADDING A NEW PAYROLL EMPLOYEE</b> .....	<b>5</b>
<b>PROCEDURE C: CONVERTING A THIRD-PARTY CONTRACTOR EMPLOYEE TO A PCGENESIS PAYROLL EMPLOYEE</b> .....	<b>29</b>
<b>PROCEDURE D: NEW EMPLOYEE IMPORT PROCESS</b> .....	<b>39</b>
D1. DOWNLOADING THE PCG_NEW_ONE_EMPLOYEE.XLSX TEMPLATE .....	39
D1.1. <i>PCG_New_One_Employee.xlsx Template – Example</i> .....	40
D2. SAVING THE PCG_NEW_ONE_EMPLOYEE.XLSX TEMPLATE AS A MICROSOFT® EXCEL SPREADSHEET/WORKBOOK .....	42
D3. USING THE PCGENESIS TEMPLATE TO CREATE A NEW EMPLOYEE.....	44
D4. MODIFYING AND SAVING THE PCG_NEW_ONE_EMPLOYEE.CSV FILE IN MICROSOFT® EXCEL .....	55
D5. IMPORTING THE PCG_NEW_ONE_EMPLOYEE.CSV FILE INTO PCGENESIS .....	58
D5.1. <i>Performing a PCGenesis Data Backup</i> .....	58
D5.2. <i>Importing the Microsoft® Excel PCG_New_One_Employee.csv File into PCGenesis</i> .....	59
<b>APPENDIX A: FORMATTING THE PCG_NEW_ONE_EMPLOYEE.CSV FILE (MULTIPLE FILES, ONE EMPLOYEE PER FILE)</b> .....	<b>70</b>
<b>APPENDIX B: PCGENESIS AUTOMATIC RECORD CREATION</b> .....	<b>77</b>
B1. PAYROLL SYSTEM DEDUCTION SCREEN – EXAMPLES.....	77
B2. CERTIFIED/CLASSIFIED PERSONNEL INFORMATION (CPI) SCREENS – EXAMPLES.....	78
B2.1. <i>Certificate File - Biographical Screen – Example</i> .....	78
B2.2. <i>Certificate File Maintenance Screen – Example</i> .....	79
B2.3. <i>Certificate File – Assignment Screen – Example</i> .....	79

## Overview

PCGenesis new employee record entries allows for the entry of new, terminated, and inactive employees' personal, job-related, and supplementary payroll information. The procedure also allows CPI-Third Party Contractor employee information to be converted to new employee records.

Based on the *Add New Employee* screen's entries, PCGenesis creates additional information for the employee within other PCGenesis components, where appropriate. For example, after entering State Health Benefit Plan (SHBP) options, tiers, and deduction codes, and saving the employee's information, PCGenesis automatically creates the appropriate deduction amount entries on the employee's *Deduction Data* screen. Likewise, for certified employees, PCGenesis creates corresponding Certified/Classified Personnel (CPI) employee biographical, assignment and certification records for the new employee when updating the *CSI Job (from CPI)* and *Include on CPI?* fields, and saving the record. When doing so for classified employee entries, PCGenesis automatically creates a CPI biographical information record for the employee. Although not included in the *Add New Employee* procedure, *Appendix B1. Payroll System Deduction Screen – Examples* and *Appendix B2. Certified/Classified Personnel Information (CPI) Screens – Examples* provide screenshots to illustrate PCGenesis' automatic creation of the additional components' records. For new employees, PCGenesis defaults the *SEC125 (Cafeteria Plan)* field to 'Y' (Yes) on the employee's *Deduction Data* screen.

**Import for New Hire Data:** The *PCG\_New\_One\_Employee.xlsx* template is provided for use during the *New Employee Import* file procedure. The new hire import process will facilitate gathering employee information from multiple departments and/or schools into Microsoft® Excel Spreadsheets/Workbooks which can then be loaded into the PCGenesis system either individually, or in batch mode. Refer to *Section D: New Employee Import Process* for the instructions on using the *PCG\_New\_One\_Employee.xlsx* template in the creation of new employees through the *Add New Employee* on-line screen. Refer to the *Payroll System Operations Guide, Section I: Special Functions, Topic 8: Payroll Export and Import File Processing, Topic 8E: Payroll New Hire Export and Import File Processing* for instructions on loading the new employee import files in batch mode.

Refer to *Payroll System Operations Guide, Topic 4: Update/Display Payroll Information* for the instructions on entering additional payroll information for the new employee. As the Professional Standards Commission (PSC) bases certified employee salaries on job assignments with corresponding *issued* and *in-progress* certifications, it is imperative that all employee assignment and certification record information be complete and valid. The *Certified/Classified Personnel Information (CPI) System Operations Guide, Section A: Displaying/Updating Individual Employee Information* provides detailed instructions for completing the CPI module's entries.

**Third-Party Contract Employee Information:** Generally, PCGenesis does not permit access to the third-party contractor information from the PCGenesis payroll module. PCGenesis users must access third-party contractor information via the *Certified/Classified Personnel Information (CPI)* module. However, PCGenesis supports the conversion of third-party contractor employee information to a PCGenesis payroll employee from within the *Add New Employee* module. Refer to *Procedure C: Converting a Third-Party Contractor Employee to a PCGenesis Payroll Employee* for the instructions on changing a third-party contractor to a payroll employee.

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

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

**Teacher Retirement System (TRS) Reporting:** The *Retire Elig Date (Retirement Eligibility Date)* field identifies the date on which the employee becomes eligible to participate in the assigned retirement plan. For normal TRS employees, PCGenesis defaults the *Amt/%* field's entry to the normal TRS employee share as defined within the TRS tax table.

The *TRS DOE Paid ERCON (Teacher Retirement System-Georgia Department of Education Paid Employer Contribution)* field identifies the Georgia Department of Education (GaDOE) as the employer-paid contributor for the employee's TRS retirement plan.

For HB210/SB 327 TRS Retirees: Use *Pension Switch* 'R' for rehired TRS retirees. HB210/SB 327 allows retirees to return to work full-time, and requires the employer to pay both the employee's share and the employer's share of the TRS premium. When using *Pension Switch* 'R', ensure that the *Pension code* field reflects '2' (TRS), the *Pens Amt/%* field reflects '0.00', and the *Service Ind* field reflects '1' (In-Service).


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




GHI Change Code/GHI Change Date Fields: The GHI change code and change date fields track employee changes impacting GHI processing. PCGenesis defaults to *NEMP (New Employee Hire)* for new employee information. 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.

**State Exemptions (Allowances):** PCGenesis divides exemptions into two separate fields for payroll calculation. These fields include **State Allow Mar[ ]** to enter the allowances for marital status from *Line 5* of the *G-4* form, and **State Allow Dep[ ]** to enter the number of dependent allowances from *Line 4* of the *G-4* form. As of 2024, the Georgia withholding formula does not use a **Marital Allowance**. Even though this field is still available on the employees' *Update/Display Withholding Data* screen, the **Marital Allowance** value will be ignored.

**Account Number Codes:** Entries in the **Acct# Yr Fnd F Prgm Fnct Object Fcty B Addt'l** fields must exist in the *Budget Account Master* file. Refer to the *Financial Accounting and Reporting (FAR) System Operations Guide, Section A: Budget Account Master Processing* for instructions.

**Payroll/Annuity Codes:** All description codes must exist in the payroll *Description* file and all annuity company codes must exist in the payroll *Annuity* file before using the codes to update employees' payroll information. Although PCGenesis allows up to five annuity company entries per employee record, PCGenesis users must create the corresponding annuity control codes before entering the information for employees. Refer to *Section F: Payroll Description/Deduction/Annuity File Processing* for instructions.

**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  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.

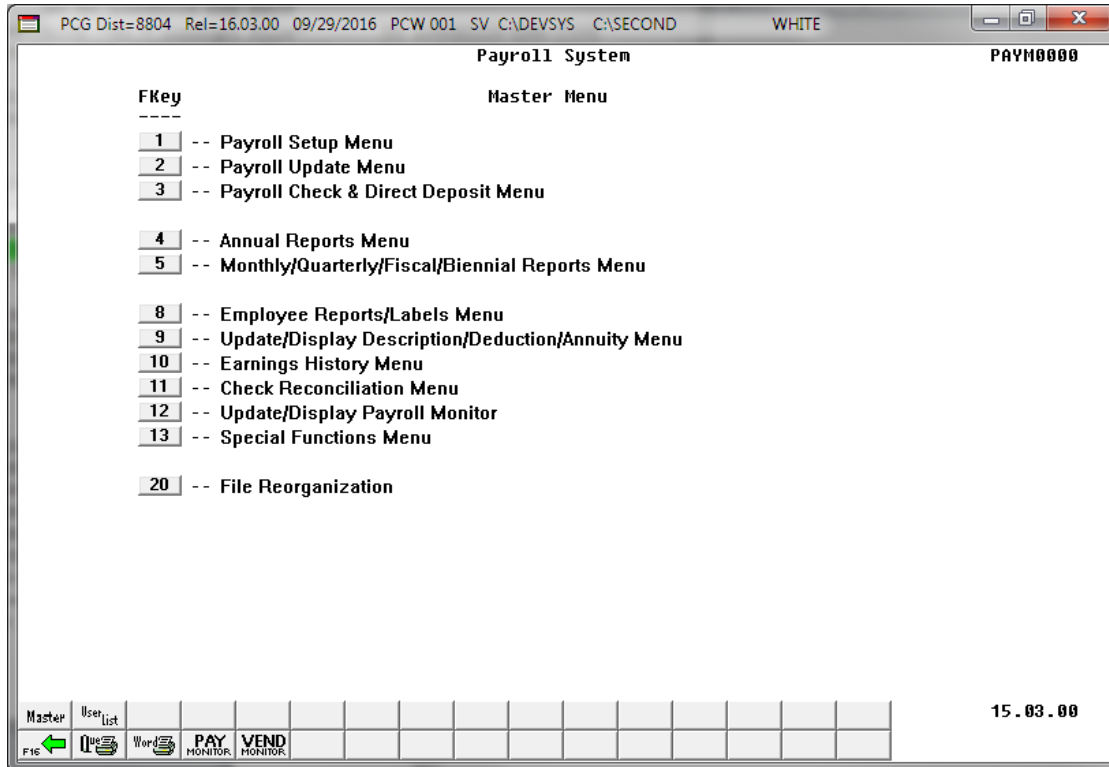
## *Procedure A: Setting/Clearing Employee Search Criteria*

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

## Procedure B: Adding a New Payroll Employee

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

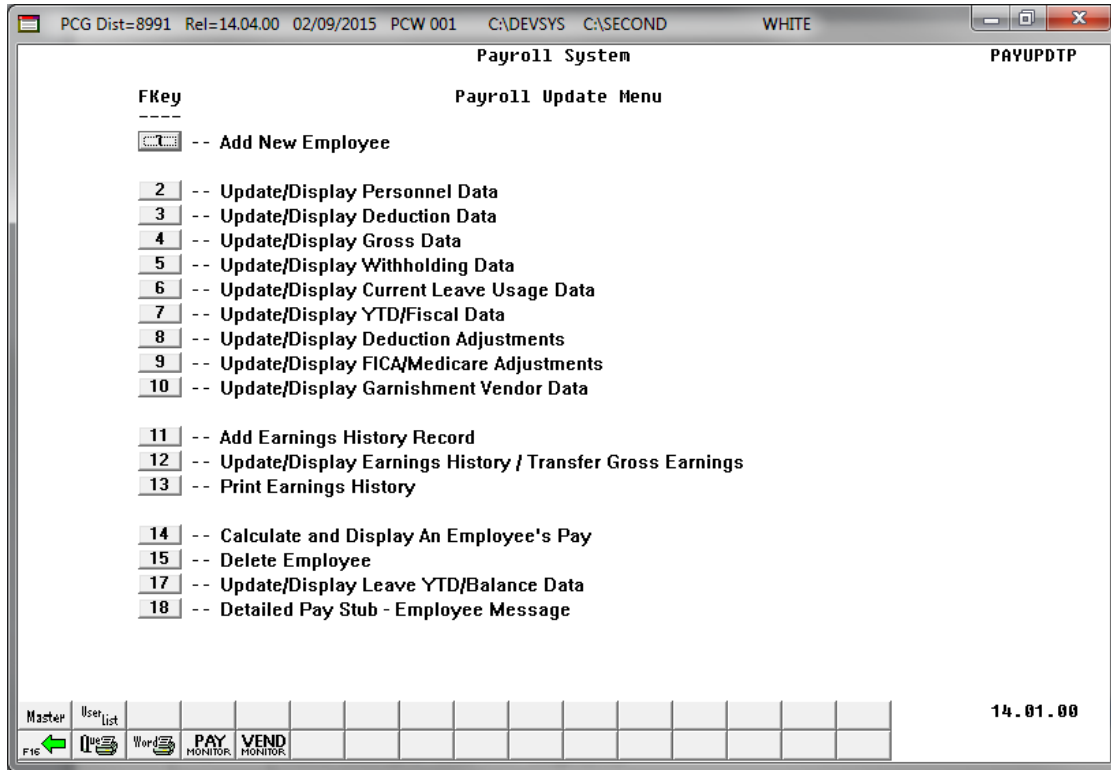
The following screen displays:



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






The following screen displays:



Step	Action
3	Select <b>1</b> (F1 - Add New Employee).

The following screen displays:

Step	Action
4	PCGenesis automatically defaults to <b>A</b> (Active) in the <b>Status</b> field for all new employee entries. <i>Modify this field in Step 9 where appropriate.</i>
5	Enter the employee number in the <b>Emp. no.</b> (Employee Number) field. <i>The employee number is school district-specific, and must be unique for each employee. If the employee number already exists, “Invalid data, Employee Number on File” displays. In this instance, reenter the correct information in the field and select Enter, or select F16 to return to the Payroll System – Payroll Update Menu. If necessary, select F2 (Update/Display Personnel Data) to review the existing employee’s information and to determine how to proceed.</i> <i>The Pay Loc field’s drop-down selection icon  becomes available after entering the employee number.</i>
6	Enter the location code or select the drop-down selection icon  in the <b>Pay Loc</b> (Pay Location) field to choose the employee’s payroll location.
7	Enter the class code or select the drop-down selection icon  in the <b>Class</b> field to choose the employee’s pay class.



For **Substitute** employees the following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** PAY01

Status **A** -- Active  
 Emp. no. 54545 Pay Loc 14 Location 000014 **Class 24 SUBSTITUTES**  
 Sex Code - Work Loc Job  
 Mar Stat - SSN 000 00 0000 EE0-5 Job 000  
 Ethnic



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





Address \_\_\_\_\_ Certificate Type \_\_\_\_\_  
 Address L2 \_\_\_\_\_ CS1 Job (from CPI) 000  
 City/State \_\_\_\_\_ **Include on CPI ? N**  
 Zip Code \_\_\_\_\_ County 000 SICK Bank ? N  
 Phone ( ) 000-0000 Substitute rank -  
 Cell phone ( ) 000-0000 Hours Per Day \_\_\_\_\_


Birth Date \_\_\_\_\_ GHI Eligible ? N Participate in GHI ? \_  
 Hire Date \_\_\_\_\_ GHI BOE Trans? D GHI Option NC WAIVED  
 Rehire Date \_\_\_\_\_ GHI 1st Day Wrk \_\_\_\_\_ GHI Tier 00 NO COVERAGE  
 Background \_\_\_\_\_ GHI Coverage Start \_\_\_\_\_ GHI Ded Cd -  
 Term Date \_\_\_\_\_ GHI Change Code NEMP


GHI Email Pref (W or P) W  
 Employee work e-mail: \_\_\_\_\_  
 Employee personal e-mail: \_\_\_\_\_


ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F15  
 F16 F17 F18 Help 22.04.00

Step	Action
9	Verify or enter <b>A</b> (Active) or enter <b>T</b> (Terminated), or <b>I</b> (Inactive) in the <b>Status</b> field to identify the employee’s status, where appropriate.
10	Enter <b>F</b> (Female) or <b>M</b> (Male) in the <b>Sex Code</b> field to identify the employee’s gender.
11	Enter the location code or select the drop-down selection icon  in the <b>Work Loc</b> (Work Location) field to choose the employee’s primary work location code.
12	Enter the code or select the drop-down selection icon  in the <b>Job</b> field to choose the employee’s job classification.
13	Enter <b>M</b> (Married) or <b>S</b> (Single) in the <b>Mar Stat</b> (Marital Status) field.
14	Enter the employee’s social security number in the <b>SSN</b> (Social Security Number) field. <i>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 temporarily. Enter the employee’s actual social security number in the SSN (Social Security Number) field before W2 calendar year-end processing however. PCGenesis automatically updates this information for the employee’s earnings history information.</i>





Step	Action
15	<p>Enter the code or select the drop-down selection icon  in the <b>EEO-5 Job</b> field to choose the employee's EEO-5 job code.</p> <p><i>The <b>EEO-5 Job</b> code is necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>
16	<p>Enter the code or select the drop-down selection icon  in the <b>Ethnic</b> field to choose the employee's ethnicity.</p>
17	<p><b>EEO-5 and CPI Ethnic/Race:</b></p> <p>Select the  (<b>Radio Button</b>) to left of the appropriate response in the <b>Hispanic/Latino Ethnicity?</b> field.</p> <p><i>The <b>Hispanic/Latino Ethnicity</b> field is necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>
18	<p><b>EEO-5 and CPI Ethnic/Race:</b></p> <p>Select the  (<b>Radio Button</b>) to left of all of the responses which apply in the <b>Race (Select all that apply)</b> fields.</p> <p>Valid options include:</p> <ul style="list-style-type: none"> <li>American Indian Alaskan</li> <li>Black</li> <li>White</li> <li>Asian</li> <li>Hawaiian Pacific</li> </ul> <p><i>Select at least one response.</i></p> <p><i>The <b>Race</b> fields are necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i></p>
19	<p>Enter the employee's first name and middle name or middle initial, up to fifteen (15) characters each in the <b>(NAME) First</b> and <b>(NAME) Middle</b> fields.</p> <p><i>The <b>First name</b> is a required field. The <b>Middle name or initial</b> is an optional field.</i></p>
20	<p>Enter the employee's last name, up to fifteen (15) characters in the <b>(NAME) Last</b> field.</p> <p><i>The <b>last name</b> field is a required field.</i></p>
21	<p>Enter the suffix for the employee's name in the <b>Suffix</b> field.</p> <p><i>Examples of this entry include Sr. (Senior) or Jr. (Junior).</i></p>
22	<p>Enter the employee's professional title in the <b>(NAME) Prefix</b> field.</p> <p><i>PCGenesis uses this field for such processes as contract processing. An example of an entry would include Dr. (Doctor).</i></p>

Step	Action
23	Enter the employee's street/mailling address, up to thirty (30) characters per field, in the <b>Address</b> and <b>Address L2</b> fields.
24	Enter the employee's city in the first field, up to twenty-seven (27) characters, and the two-character state code in the second <b>City/State</b> field. <i>The comma (,) already exists to separate the two entries.</i>
25	Enter the employee's postal code, including the <i>Zip+4</i> postal codes where appropriate, in the <b>Zip code</b> field.
26	<b>SHBP/GHI (Required):</b> Enter the county of residence code in the <b>County</b> field. <i>Refer to the "Georgia County Code Listing" for a complete listing of Georgia counties and county codes.</i>
27	Enter the employee's telephone number(s) including the area code (###-###-####) in the <b>Phone</b> field and the <b>Cell Phone</b> field, if applicable.
28	<b>For Certified employees only:</b> Enter the employee's certificate type in the <b>Certificate Type</b> field. <i>The GaDOE provides a complete listing of certificate types at:</i> <a href="http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx">http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx</a>
29	Enter the employee's CPI job code in the <b>CS1 Job (from CPI)</b> field. <i>The GaDOE provides a complete listing of CPI Job Codes at:</i> <a href="http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx">http://www.gadoe.org/Technology-Services/Data-Collections/Pages/FY2017-CPI-Resources.aspx</a>
30	Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>Include on CPI?</b> field to identify the employee's inclusion in, or exclusion from CPI reporting. <i>For Long Term Substitutes, enter Y (Yes) in the field.</i>
31	Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>Sick Bank?</b> field to choose the employee's participation in your system's sick bank program.
32	Enter the code or select the drop-down selection icon  in the <b>Substitute Rank</b> field to choose the employee's substitute rank code. <i>The <b>Substitute Rank</b> code is necessary when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i>

Step	Action
33	<p>Enter the hours per day in the <b>Hours Per Day</b> field, where appropriate.</p> <p><i>The Hours Per Day field is necessary when the Enhanced Substitute Pay and Leave System has been enabled on the Tax/Withholding/Control Menu. This field allows the system to convert hours to days when entering time off in the Substitute Pay and Leave System.</i></p>
34	Enter the employee's date of birth (MM/DD/CCYY) in the <b>Birth Date</b> field.
35	Enter the employee's <u>initial</u> hire date (MM/DD/CCYY) in the <b>Hire Date</b> field.
36	Enter the employee's <u>rehire</u> date (MM/DD/CCYY) in the <b>Rehire Date</b> field, where appropriate.
37	Enter the employee's <u>background-check</u> date (MM/DD/CCYY) in the <b>Background</b> field, where appropriate.
38	Enter the employee's termination date (MM/DD/CCYY) in the <b>Term date</b> (Termination date) field, where appropriate.
39	Enter the termination code or select the drop-down selection icon  in the <b>Term reason</b> (Termination reason) field to choose the termination reason where appropriate
40	<p><b>GHI Eligible?</b> field:</p> <p>Enter <b>Y</b> (Yes – Employee is eligible to receive benefits) or <b>N</b> (No – Employee is not eligible to receive benefits) in the field to choose the employee's plan eligibility.</p> <p><i>This is a required field for SHBP/GHI reporting.</i></p>
41	<p><b>GHI BOE Trans?</b> (GHI Board of Education Transfer) field – Required if the <b>GHI Eligible?</b> field is set to 'Y'.</p> <p>Indicate whether or not the employee transferred from another school district.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li><b>Y</b> – Yes, the employee transferred from another school district</li> <li><b>N</b> – No, the employee did not transfer from another school district</li> <li><b>D</b> – Don't know whether or not the employee transferred from another school district</li> </ul> <p>The <b>GHI BOE Trans?</b> field is mostly informational; however, this data should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly. If the <b>GHI BOE Transfer</b> field is set to 'Y', but a <b>GHI Coverage Start Date</b> has not been entered, a <u>warning</u> message will be displayed.</p>
42	<p><b>GHI 1<sup>st</sup> Day Wrk</b> (GHI 1<sup>st</sup> Day Worked) field – Required if the <b>GHI Eligible?</b> field is set to 'Y'.</p> <p>Enter the first date (MM/DD/CCYY) for which the employee is compensated.</p>

Step	Action
43	<p><b>GHI Coverage Start</b> (GHI Coverage Start Date) field – Optional, but the <b>GHI Eligible?</b> field must be set to ‘Y’.</p> <p>Enter the date (MM/DD/CCYY) when the employee’s GHI benefit coverage starts. The <b>GHI Coverage Start</b> field is an optional field on the screen and is typically used for an employee transferring from another school district.</p> <p>The <b>GHI Coverage Start</b> field is an optional field on the <i>Add New Employee</i> screen. Per instructions from the Georgia State Health Agency, the <b>GHI Coverage Start</b> field should only be <b>used for summer transfers from May 1 through October 31</b>. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. According to the Georgia State Health Agency, the <b>BOE Coverage Start Date</b> field will allow payroll locations to start a transferring employee’s coverage on the exact date selected by the BOE without the date rolling forward an additional month.</p> <p><b>NOTE:</b> If the <b>GHI BOE Transfer</b> field is set to ‘Y’, but a <b>GHI Coverage Start Date</b> has not been entered, a <u>warning</u> message will be displayed.</p>
44	<p><b>GHI Change Code</b> field - Required if the <b>GHI Eligible?</b> field is set to ‘Y’.</p> <p>Select the drop-down selection icon  in the field to identify the reason for the employee’s GHI coverage change.</p>
45	<p><b>Participate in GHI?</b> field:</p> <p>Enter <b>Y</b> (Yes – Employee participates in SHBP) or <b>N</b> (No – Employee does not participate in the SHBP) to choose the employee’s plan participation.</p> <ul style="list-style-type: none"> <li>• Enter <b>N</b> (No) if the <b>GHI Option</b> field will be <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and the <b>GHI Tier</b> field will be <b>00</b> (No Coverage).</li> <li>• Enter <b>Y</b> (Yes) if the employee <b>GHI Option</b> and the <b>GHI Tier</b> fields will be codes other than <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and <b>00</b> (No Coverage).</li> </ul> <p>Starting <b>July 1, 2012</b>, Direct Billing for certificated employees covered by SHBP takes effect. SHBP moves from a percentage of state-based salaries for every <b>SHBP-eligible</b> certificated employee and instead begins paying a “direct” per member per month (PMPM) rate (i.e., a flat rate) for each certificated employee <b>enrolled</b> in the SHBP. <i>Therefore, an employer contribution will NOT be billed for employees with a <b>GHI Option</b> field of <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible).</i></p>



Step	Action
46	<p><b>GHI Option</b> field - Required if the <b>Participate in GHI?</b> field is set to ‘Y’.</p> <p>Using the SHBP’s supporting documentation for the current year, enter or select the drop-down selection icon  in the field to choose the employee’s health plan code.</p> <p><i>PCGenesis defaults this entry to NC (Waived Coverage).</i></p> <p><i>While not included in the Add New Employee procedure, PCGenesis automatically enters the GHI deduction amount for the GHI deduction code on the employee’s Deduction screen. The Update/Display Deduction Data screen is accessed by selecting F3 (Update/Display Deduction Data) from the Payroll System – Payroll Update Menu.</i></p>
47	<p><b>GHI Tier</b> field - Required if the <b>Participate in GHI?</b> field is set to ‘Y’.</p> <p>Enter or select the drop-down selection icon  in the field to choose the employees’ level of coverage (tier) code.</p> <p><i>PCGenesis defaults this entry to 00 (SHBP Waived).</i></p>
48	<p><b>GHI Ded Cd (GHI Deduction Code)</b> field - Required if the <b>Participate in GHI?</b> field is set to ‘Y’.</p> <p>Enter or select the drop-down selection icon  in the field to choose the deduction code.</p> <p><i>An invalid entry in this field will generate the “Deduction Code not valid or not set up as SHBP Deduction” message. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions on the entry of this code.</i></p>
49	<p><b>Email Preference:</b> Required. This field designates whether the employee prefers to send their work e-mail address or their personal e-mail address to the State Health Benefits Program (SHBP).</p> <p>Valid Values:            <b>P</b> = Send the personal e-mail address to SHBP                                      <b>W</b> = Send the work e-mail address to SHBP</p> <p><i>PCGenesis defaults this entry to W (send work e-mail address to SHBP).</i></p>
50	<p>Enter the employee’s work e-mail address in the <b>Employee work e-mail</b> field. The e-mail address must contain one ‘@’ sign.</p>
51	<p>Enter the employee’s personal e-mail address in the <b>Employee personal e-mail</b> field. The e-mail address must contain one ‘@’ sign.</p>
52	<p>Select  (<b>Enter</b>) to validate the screen’s entries.</p>

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** **PAY01**

Status **A** -- Active **SMITH, JANE H.**

Emp. no. **77788** Pay Loc **106** Location **000106** Class **7** CERTIFIED 10 MONTH

Sex Code **E** Work Loc **106** Location **000106** Job **107** GRADE 7

Mar Stat **S** SSN **777 88 5555** EEO-5 Job **000** Undefined

Ethnic **2** WHITE

NAME First **JANE** Middle **H.**

Last **SMITH** Suffix \_\_\_\_\_ Prefix **MS.**

Address **1 WEST FIRST STREET** Certificate Type \_\_\_\_\_

Address L2 **APARTMENT 12** CS1 Job (from CPI) **000**

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

Zip Code **30000** County **160** Sick Bank ? **N**

Phone **(444)555-6666** Out of State \_\_\_\_\_ Substitute rank **2**

Cell phone **(404)333-2222** Hours Per Day \_\_\_\_\_

Birth Date **11/01/1961** GHI Eligible ? **Y** Participate in GHI ? **Y**

Hire Date **1/01/2012** GHI BOE Trans? **Y** GHI Option **B6** ANTHEM HMO

Rehire Date \_\_\_\_\_ GHI 1st Day Wrk **1/01/2012** GHI Tier **10** SINGLE

Background **1/01/2015** GHI Coverage Start **2/01/2012** GHI Ded Cd **8**

Term Date \_\_\_\_\_ GHI Change Code **NEMP**

Term Reason **\_**

GHI Email Pref (W or P) **P**

Employee work e-mail: **JANE.SMITH@DOE.K12.GA.US**

Employee personal e-mail: **JSMITH@OUTLOOK.COM**

**Validations passed. Check screen 2 or save your changes**

ENTER **22.04.00**


**Help**



Step	Action
53	<p>Verify “Validations passed. Check screen 2 or save your changes.” displays, and select  (F11 – Go to Screen 2).</p> <p>Select  (F3 – Print this data) to obtain a screen print of the <i>Add New Employee</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’.</p>



The following screen displays:

Step	Action
54	Enter the appropriate response in the <b>Tax Switches: Federal</b> <i>and</i> <b>State</b> field. Valid Values: <b>Y</b> = Compute withholding <b>N</b> = Do NOT compute withholding
55	Enter the appropriate response or code in the <b>Tax Switches: FICA</b> (Federal Insurance Contributions Act Tax Switches) field. Valid Values: <b>Y</b> = Compute OASDI/Medicare <b>N</b> = Do NOT compute OASDI/Medicare <b>M</b> = Compute Medicare only

Step	Action
56	<p>Enter the appropriate code in the <b>Tax Switches: Pension</b> field.</p> <p>Valid values:           <b>Y</b> = Calculate pension                                      <b>N</b> = Do NOT calculate pension                                      <b>R</b> = TRS Retiree – Do NOT calculate an employee percentage</p> <p><i>This entry determines the handling of the employee’s pension calculation and the additional TRS/ERS calculation, and overrides the entry in the <b>Pension Code</b> field.</i></p> <p><i>When entering ‘N’ in the <b>Pension Switch</b>, PCGenesis suspends the pension calculation <u>for this employee for the current Payroll Run</u>. This entry neither affects other employees’ pension calculations, nor requires the employee’s pension code to be changed.</i></p> <p><i>When entering ‘Y’ (Yes) in the <b>Pension Switch</b> field, and ‘0’ in the <b>Pension Code</b> field, PCGenesis does not calculate a pension deduction for the employee.</i></p> <p><i><u>For HB210/SB 327 TRS Retirees:</u> Use <b>Pension Switch ‘R’</b> for rehired TRS retirees. HB210/SB 327 allows retirees to return to work full-time, and requires the employer to pay both the employee’s percentage and the employer’s percentage contribution. When using the code, ensure that the <b>Pension Code</b> field reflects ‘2’ (TRS), the <b>Amt/%</b> field reflects ‘0.00’, and the <b>TRS service ind</b> field reflects ‘1’ (In-Service).</i></p>
57	<p>Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>TRS DOE Paid ERCON</b> (Teacher Retirement System-Georgia Department of Education Paid Employer Contribution) field to identify the Georgia Department of Education’s employer-paid contribution to the school district’s retirement plan.</p> <p><i>When the Step 56 - <b>Tax Switches: Pension</b> field’s entry is ‘R’ (TRS: Employer Pays <u>both</u> employer and employee shares), the <b>TRS DOE Paid ERCON</b> (Department of Education pays the Employer’s Contribution) field <u>may not contain Y</u> (Yes) as the two settings are mutually exclusive. Additionally, the <b>TRS DOE Paid ERCON</b> flag may only be set to <b>Y</b> (Yes) when the Step 58 - ‘<b>Pension Code</b>’ field’s entry is 2 (TRS).</i></p>
58	<p>Enter the appropriate code in the <b>Pens Code</b> (Pension Code) field.</p> <p>Valid Values:           <b>0</b> = No Pension                                      <b>1</b> = Old PSERS Participation                                      <b>2</b> = TRS Pension Participation                                      <b>3</b> = Old ERS Participation                                      <b>4</b> = New ERS Participation                                      <b>5</b> = New PSERS Participation                                      <b>6</b> = GSEPS Participation</p>
59	<p>Enter the appropriate code in the <b>TRS service ind</b> (Indicator) field to define the employee’s Teacher Retirement System (TRS) service credit.</p> <p>Valid values:           <b>0</b> = No service credit                                      <b>1</b> = Service credit earned for the month</p>

Step	Action
60	<p>Enter the code or select the drop-down selection icon  in the <b>No pension code</b> field to choose the reason for no public pension.</p> <p>The <b>No pension code</b> field has been added to support the new <i>Pension Reporting Compliance File</i> required by ERSGA. A valid value must be entered in the <b>No Pension Code</b> field when the employee's <b>Pension Code</b> is set to '0', no pension. If the employee is enrolled in a public pension (<b>Pension Code</b> values of '1' thru '6'), then the <b>No Pension Code</b> value must be '00'.</p>
61	<p>The <b>Pens Amt/%</b> (Amount/Percentage) field is not editable for new employees. PCGenesis will automatically populate the entry based on the PSERS/TRS/ERS tables.</p>
62	<p><b>TRS/ERS Reporting - Required:</b> Enter the date (MM/DD/CCYY) in the <b>Pens Elig Date</b> (Pension Eligibility Date) to identify when the employee becomes eligible to participate in the TRS or ERS or GSEPS pension plan.</p> <p><i>TRS uses the pension eligibility date to precisely identify when an employee became eligible for their current pension. This is most important for TRS reporting in the case that a PSERS or Substitute employee changes job functions and becomes eligible to enroll in TRS. In this instance, the employee would retain their original hire date, but have a pension eligibility date tied to the date of the change of their job role.</i></p>
63	<p>Enter the dollar amount <u>or</u> percentage in the <b>TRS / ERS Pens Gross Adj Amt/%</b> (Teacher Retirement System Pension Gross Adjustment Amount/Percentage) field where appropriate.</p> <p>The <b>TRS / ERS Pens Gross Adj Amt/%</b> field is needed by some districts who do not participate in Social Security for many classes of employees. In certain cases, the district's board of education can vote to contribute a certain percentage (for example, 4%) on all classes of employees to a reputable 403(b) in lieu of Social Security. Therefore, the salary reported to TRS can be increased by this percentage as a supplement type for employees. For example: Employee 'A' has a gross salary of \$4,000 per month, but is reported to TRS as \$4,160 (which includes the 4%). The <b>TRS / ERS Pens Gross Adj Amt/%</b> field allows PCGenesis to increase the TRS/ERS reported wages by the 4%. According to the <i>TRS Employer's Reference Guide</i>, a tax sheltered annuity plan is listed as other earnable compensation.</p>
64	<p>The <b>Pay Sch. #</b> (Payroll Schedule Number) field is not editable in PCGenesis.</p> <p><i>PCGenesis automatically populates this entry based on the employee's pay class.</i></p>
65	<p>Enter the appropriate code in the <b>Cycle</b> field to define the manner in which year-to-date (YTD) figures will accrue on the employee's pay stub.</p> <p>Valid Values:</p> <ul style="list-style-type: none"> <li>1 = Calendar Year</li> <li>2 = School Year</li> <li>3 = Fiscal Year</li> </ul>
66	<p>Enter the total number of contract months the employee <u>works</u> in the <b>Contract mo</b> (Contract Months) field.</p>

Step	Action
67	Enter the total number of contract months the employee worked in the <u>prior year PY contmo</u> (Prior Year Contract Months) field.
68	<p><b>Hrs/Week:</b> Required for State Health Benefit Plan (SHBP)/Georgia Health Insurance (GHI) Report and Extract File Creation. For more information, refer to <i>Section D: Monthly/Quarterly/Annual/ Fiscal Report Processing, Topic 1: Processing Monthly Reports.</i></p> <p>Enter the number of hours per week the employee works in the <b>Hrs/Week</b> (Hours per Week) field.</p>
<b>Complete Steps 69 - 81 for each Proc Type entered in Step 69.</b>	
69	<p>Enter the processing line type or select the drop-down selection icon  in the <b>Proc Type</b> (Processing Type) field to identify the processing type.</p> <p>Valid Values:           <b>D</b> = Regular daily with pension and taxes                                      <b>H</b> = Regular hourly with pension and taxes                                      <b>S</b> = Regular salary with pension and taxes</p>
70	<p><b>Pay Type:</b> Optional. Used only for the new detailed pay stub.</p> <p>Enter the pay type or select the drop-down selection icon  in the <b>Pay Type</b> field to define the employee's pay type.</p> <p>The new detailed check stub contains a new section of data entitled <b><i>Current Hours and Earnings</i></b>. The current earnings will print based upon the <b>Pay Type</b> entered for the gross data line. The <b><i>Current Hours and Earnings</i></b> section on the detailed check stub will list the pay type descriptions, along with the pay rates, regular and overtime hours, regular and overtime pay, and contract amounts.</p> <p>In order to get a proper breakdown of the earnings, users will need to categorize their employees' Gross Data earnings by <b>Pay Type</b> before utilizing the new detailed pay check statement. All gross data lines with the same <b>Pay Type</b> and <b>Pay Rate</b> will be summarized (and accumulated) on ONE earning line on the check stub.</p> <p>The pay types are user-defined. Detailed instructions for setting up <b>Pay Type</b> codes are in the <a href="#">Payroll System Operations Guide, Section F. – Description/Deduction/Annuity File Processing</a>.</p> <p>NOTE: The names <i>Pay Type</i> and <i>Compensation Type</i> are used interchangeably. The codes used to define <b>Pay Type</b> on the <i>Update/Display Gross Data</i> screen are called <b>Compensation Type</b> (code 'P') on the <i>Maintain Description Records</i> screen. The <b>Pay Type</b> table is defined in the <i>Description File</i> under 'P – Compensation Type'.</p> <p><i>The defaulting entry '0000' prints as 'Regular Pay' on the detailed check stub.</i></p>
71	<p>Enter the employee's pay rate in the <b>Pay Rate</b> field, where applicable.</p> <p><i>If entering 'D' or 'H' in the Proc Type field, also make an entry in the Pay Rate field.</i></p>



Step	Action
72	<p>Enter the number of regular hours or days the employee works during the current payroll cycle in the numbered <b>Reg Hrs</b> (Regular Hours) field(s), where applicable.</p> <p><i>If entering 'D' or 'H' in the Proc Type field, also make an entry in the Reg Hrs field. Minutes are entered in the quarterly hour decimal format i.e., for example, thirty (30) minutes are entered as 0.50.</i></p>
73	<p>No entry is required in the <b>Ovt Hrs</b> (Overtime Hours) field for new employees.</p>
74	<p><b>For Salaried employees:</b> Enter the employee's cycle gross salary amount in the <b>Reg Gr</b> (Regular Gross) field.</p> <p><i>PCGenesis automatically calculates the Regular Gross for Hourly and Daily employees.</i></p>
75	<p>No entry is required in the <b>Ovt Gr</b> (Overtime Gross) field for new employees.</p>
76	<p><b>GHI Dist:</b> Enter the GHI distribution percentage for the corresponding General Ledger account number. The GHI distribution percentage indicates the percentage of the employer GHI contribution to distribute to this GL account line. The GHI distribution percentage is valid only with <b>Process Types</b> 'H', 'D', or 'S'.</p> <p><i>All GL accounts must add to 100%. (1.0000 equals 100%, 0.2500 equals 25%)</i></p> <p><i>The GHI distribution percentage must be zero if the <b>GHI Participation Switch</b> is 'N', and the <b>GHI Option</b> field is <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible). An employer contribution will NOT be billed for employees with a <b>GHI Option</b> field of <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and therefore, the <b>GHI Dist</b> field must be zero.</i></p>
77	<p><b>Pay Reas:</b> Enter the pay reason code or select the drop-down selection icon  in the <b>Pay Reas</b> (Pay Reason) field to set a reason code for payroll adjustments and changes to payroll records.</p> <p><i>For example, if an employee receives a certificate upgrade and receives a retroactive pay increase, a reason code of '01' is entered on the employees adjusted new salary line, as well as any one time retroactive salary adjustment lines entered for the employee. PCGenesis clears the pay reason code during payroll setup.</i></p> <p><i>The Pay Reas field identifies the reason for a change in an employee's regular pay and is required for TRS reporting. Proper use of this field will eliminate manual follow-up reporting with TRS for pay variances.</i></p>
78	<p>Enter the employee's gross salary account information, or select the select the drop-down selection icon  within the numbered <b>Acct# Yr Fnd F Prgm Fnct Objet Fcty B Addt'l</b> (Account number/Year/Fund/Fiscal/Prgm/Function/Object/Facility/Building/Additional) field(s) to choose the account information.</p> <p><i>After saving these entries, they may be modified on the employee's Gross Data screen.</i></p>

Step	Action
79	<p><b>Contract:</b> Optional for pay tracking.</p> <p>Enter the employee’s gross salary amount that is going towards the employee’s annual contract salary in the <b>Contract</b> field.</p> <p>Use this field to track an employee’s pay to help prevent over payments. The system is checking each pay cycle to see if the <b>Current Contract Amount</b> (entered here for each individual account line), plus the contents of the correct field on the <i>Update/Display YTD/Fiscal Data</i> screen have exceeded the <b>Contract Amount</b> input at the bottom of the <i>Gross Data</i> screen in <i>Step 86</i>.</p> <p>In order to determine the contract period, PCGenesis uses the <b>Cycle</b> field (<i>Step 65</i>) on the employee record. If <b>Cycle</b> is <b>1</b>, the system uses the <b>YTD Contract Amount</b> on the <i>Update/Display YTD/Fiscal Data</i> screen to determine contract over payments; if this field is <b>2</b>, the system uses the <b>School Contract Amount</b> and if the field is <b>3</b>, the system uses the <b>Fiscal Contract Amount</b>.</p>
80	<p>The <b>Budget Flg</b> (Budget Flag) field on each account line determines what formulas are applied to generate new salary amounts in the budget SANDBOX directory. The <b>Budget Flag</b> field is used with the <i>PCGenesis Budget System</i>.</p> <p>Valid values for the <b>Budget Flag</b> are as follows:</p> <p><b>A</b> = Move the account number over to the budget, but do NOT bring over any amounts.</p> <p><b>L</b> = Budget as a local supplement/extra salary. Apply either an amount or percent increase or decrease to the line salary or the line rate.</p> <p><b>M</b> = Move the account line over to the budget, but do NOT apply any increase or decrease to the line amount.</p> <p><b>N</b> = Budget as state salary, but do <u>not</u> apply a salary schedule. Apply either an amount or percent increase or decrease to the line salary or the line rate. (Usually used for non-certified employees)</p> <p><b>S</b> = Budget as state salary using the state CPI salary schedule. (Used for the ‘S’ account lines of certified employees only)</p> <p><b>T</b> = Budget as local supplement using a <u>local</u> salary schedule. (Used for the ‘S’ account lines of certified employees only)</p> <p><b>X</b> = Do not bring the account line over to the budget process. (Generally used for substitute pay, etc.)</p> <p><b>spaces</b> = Do not bring the account line over to the budget process.</p>
81	<p><u>If there are additional Proc Types:</u> Select the Tab key to access the next <b>Proc Type</b> field and repeat this procedure at <i>Step 69</i>.</p>
82	<p>Enter the employee’s cycle gross salary in the <b>Cycle Gross</b> field. <i>Enter Certified employees’ cycle gross information in the Cycle Gross field.</i></p>



Step	Action
83	Enter the employee's State of Georgia-funded annual salary in the <b>State Salary</b> field.
84	Enter the employee's locally funded annual supplement in the <b>Local Salary</b> field.
85	Enter the employee's annual salary received in addition to State of Georgia and local supplements in the <b>Other</b> field.
86	<p>Enter the employee's annual contract amount in the <b>Contract Amt</b> (Contract Amount) field.</p> <p>Use this field to track an employee's pay to help prevent over payments. The system is checking each pay cycle to see if the <b>Current Contract Amount</b> (entered for each individual account line in <i>Step 79</i>), plus the contents of the correct field on the <i>Update/Display YTD/Fiscal Data</i> screen have exceeded the <b>Contract Amount</b> input here.</p> <p>In order to determine the contract period, PCGenesis uses the <b>Cycle</b> field (<i>Step 65</i>) on the employee record. If <b>Cycle</b> is <b>1</b>, the system uses the <b>YTD Contract Amount</b> on the <i>Update/Display YTD/Fiscal Data</i> screen to determine contract over payments; if this field is <b>2</b>, the system uses the <b>School Contract Amount</b> and if the field is <b>3</b>, the system uses the <b>Fiscal Contract Amount</b>.</p>
87	<p>Verify or enter the employee's state income tax marital status code in the <b>State: Mar Stat</b> (State: Marital Status) field.</p> <p>Valid Values:</p> <ul style="list-style-type: none"> <li><b>A</b> = Single</li> <li><b>B</b> = Married Filing Separate, or Married Filing Joint, both spouses working</li> <li><b>C</b> = Married Filing Joint, one spouse working</li> <li><b>D</b> = Head of Household</li> <li><b>8</b> = Exempt – Servicemembers Civil Relief Act</li> </ul> <p>A marital status of '8' will cause all wages to be exempt from reporting for Georgia state wages, and will cause zero Georgia tax to be withheld from the employee's paycheck. The <i>Department of Labor Quarterly Payroll Report and Wages Data File</i>, and the W-2 forms will both treat any wages on the Earnings History records with a Georgia marital status of '8' as Georgia exempt wages, and these wages will not be included in these tax reports.</p>
88	<p>Verify or enter the total number of marital allowances from Line 5 of the G-4 form in the <b>State: Allowance Mar</b> (State: Marital Allowance) field.</p> <p>Verify or enter the number of dependent allowances (Line 4 of the G-4 form) in <b>State: Allowance Dep</b> (State: Dependent Allowance) field.</p> <p><b>NOTE:</b> As of 2024, the Georgia withholding formula does <u>not</u> use a <b>Marital Allowance</b>. Even though this field is still available on the employees' <i>Update/Display Withholding Data</i> screen, the <b>Marital Allowance</b> value will be ignored.</p> <p><i>When the number of State of Georgia income tax exemptions exceeds fourteen (14), submit the employee's G-4 form to the Georgia Department of Revenue. Refer to Line 4 and Line 5 of the G-4 form for State: Allowance information.</i></p>

Step	Action
89	<p>Verify or enter the state income tax withholding code in the <b>State: Withholding Code</b> field.</p> <p>Valid Values:       <b>0</b> = Normal state tax from tax table                                <b>1</b> = Normal state tax from tax table + flat amount                                <b>2</b> = Flat amount only                                <b>3</b> = Flat percentage only</p>
90	<p>The <b>State: Amt/%</b> field is used in conjunction with the <b>State Withholding Code</b>. If the <b>State: Amt/%</b> value is a whole number, it will be treated as a flat amount (codes 1 &amp; 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the additional state income tax amount <u>or</u> the total percentage in the <b>State: Amt/%</b> (State: Amount/Percentage) field is correct, where appropriate.</p> <p><i>Required for State Withholding Code entries of 1, 2, or 3. Values less than 1.00 are regarded as percentages (%).</i></p>
91	<p>Verify or enter the employee's federal income tax marital status code in the <b>Federal: Mar Stat</b> (Federal: Marital Status) field.</p> <p>Valid Values:       <b>M</b> = Married                                <b>S</b> = Single                                <b>H</b> = Head of Household (valid for 2020 W-4 or later)</p>
92	<p>Enter the appropriate response in the <b>2020 W-4?</b> field.</p> <p>Valid Values:       <b>Y</b> = Employee's W-4 form is from 2020 or later                                <b>N</b> = Employee's W-4 form is from prior to 2020</p>
93	<p>Verify or enter the employee's federal income tax withholding code in the <b>Federal: Withholding Code</b> field.</p> <p>Valid Values:       <b>0</b> = Normal Federal tax from tax table                                <b>1</b> = Normal Federal tax from tax table + flat amount                                <b>2</b> = Flat amount only                                <b>3</b> = Flat percentage only</p>
94	<p>The <b>Federal: Amt/%</b> field is used in conjunction with the <b>Federal Withholding Code</b>. If the <b>Federal: Amt/%</b> value is a whole number, it will be treated as a flat amount (codes 1 &amp; 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the employee's additional federal income tax amount <u>or</u> the tax percentage in the <b>Federal: Amt/%</b> (Federal: Amount/Percentage) field, where appropriate.</p> <p><i>Required for Federal Withholding Code entries of 1, 2, or 3. Values less than 1.00 are regarded as percentages (%).</i></p>
95	<p><b>W-4 Prior to 2020:</b> If the <b>2020 W-4?</b> field value is 'N', verify or enter the number of federal income tax exemptions in the <b>Exempt</b> (Federal Exemptions) field.</p> <p><i>When the number of federal income tax exemptions exceeds ten (10), submit the employee's W-4 form to the Internal Revenue Service. Refer to Line 5 of the W-4 form for the Federal: Exempt field's information.</i></p>

Step	Action
96	<p><b>New 2020 W-4: Box 2 Two jobs flag.</b> If the <b>2020 W-4?</b> field value is 'Y', enter 'Y' if the employee has checked the <i>Step 2</i> checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household.</p> <p>Valid Values:            Y = <i>Step 2</i> checkbox is checked on the 2020 W-4                                   N = <i>Step 2</i> checkbox is <u>not</u> checked on the 2020 W-4</p>
97	<p><b>New 2020 W-4: Box 3 Dependent amt</b> (amount). If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 3</i> of the 2020 W-4 form as the amount claimed for dependents.</p>
98	<p><b>New 2020 W-4: Box 4a Other income.</b> If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4a</i> of the 2020 W-4 form as the amount claimed for other income.</p>
99	<p><b>New 2020 W-4: Box 4b Deduction amt.</b> If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4b</i> of the 2020 W-4 form as the amount claimed for deductions.</p>
100	<p>Select  (Enter).</p> <p>Select  (F3 – Print this data) to obtain a screen print of the <i>Add New Employee</i> screen. The screen print file will be available in the print queue with the name 'PSCNnnnn'.</p>

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

Add New Employee - Screen 2

Emp. # 77788 SMITH, JANE H. Status A Pay Loc 106 Class 7

Switches: Federal Y (Y/N) Pay Sch. # 12

State Y (Y/N) Pens Code 0 NO PENS Cycle 1 CAL YR

FICA Y (Y/N/M) TRS service ind 1 Pens Elig Date 1/01/2012 Contract mo 09

Pension Y (Y/N/R) No pension code 14 TRS/ERS Pens Gross PY contmo 00

TRS DOE Paid ERCON - (Y/N) Pens Amt/% Adj Amt/% Hrs/Week 24.00

Proc Type	Pay Type	Pay Rate	Reg Hrs	Out Hrs	Reg Gr	Out Gr	GHI Dist	Pay Reas
1.	S						1.0000	
2.								
3.								
4.								
5.								
Totals							1.0000	Total Gross

Acct #	Yr	Fnd	F	Prgm	Fcty	Objct	Fcty	B	Add'l	Contract	Budget	Flg	Cycle	Gross
Acct #1	23	100		1011	1000	11000	111							1504.00
Acct #2	00													30004.00
Acct #3	00													5002.00
Acct #4	00													1002.00
Acct #5	00													35004.00
Totals													Contract Amt	35004.00

State: Mar Stat A Allowance Mar 0 Dep 0 Withholding Code 0 Amt/% .00

Federal: Mar Stat S 2020 W-4? Y (Y or N) Withholding Code 0 Amt/% .00


W-4 Prior to 2020: Exempt 0

New 2020 W-4: Box 2 Two jobs flag Y Box 4a Other income 44.44

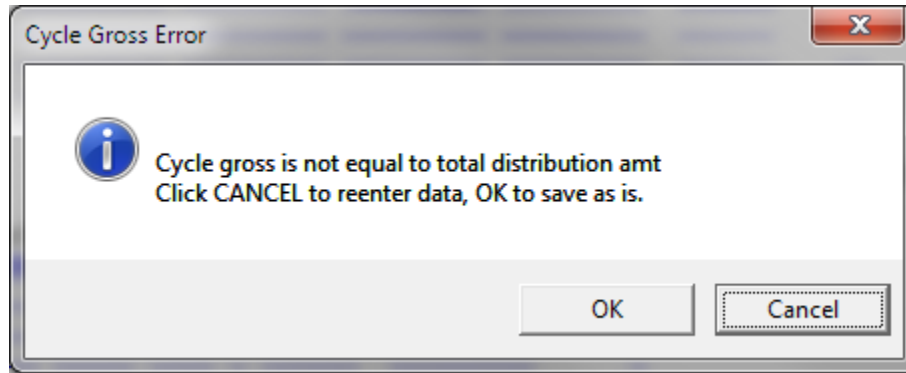
Box 3 Dependent amt 33.33 Box 4b Deduction amt 5555.55

Validations passed. Check screen 1 or save your changes.

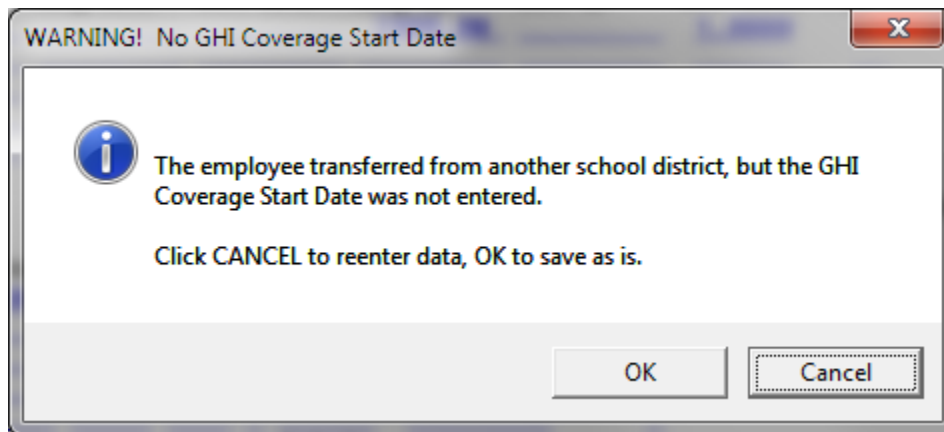
22.04.00

Step	Action
101	Verify “ <i>Validations passed. Check screen 1 or save your changes.</i> ” displays, and select  (F8 – Save changes).

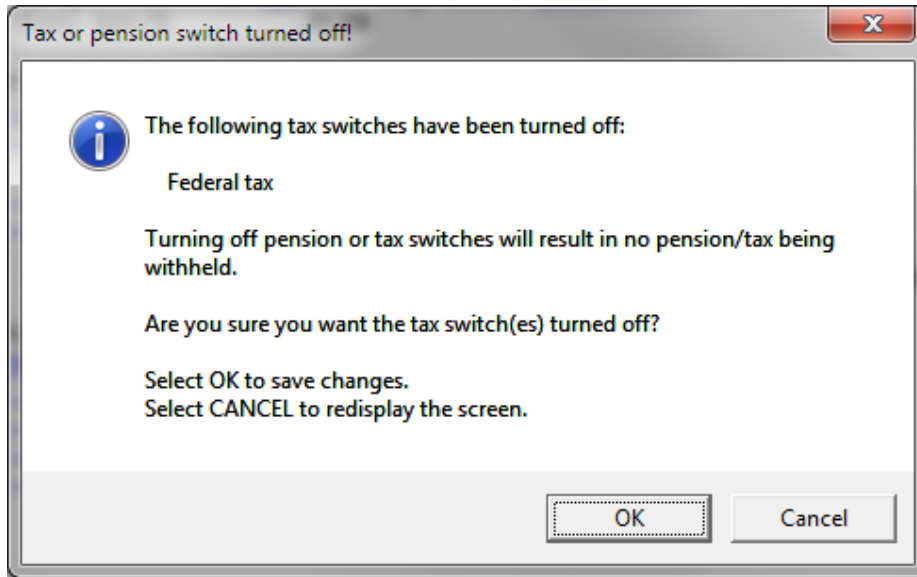
If the cycle gross is not equal to the total gross distribution amount, the following warning dialog box displays:



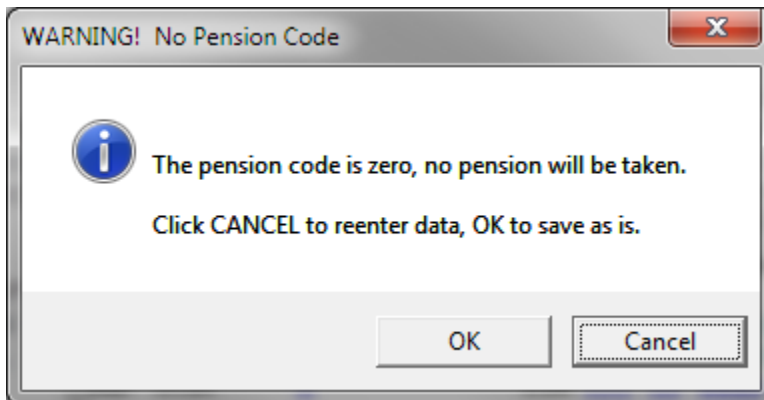
If the employee transferred from another school district (**GHI BOE Trans?** field equals ‘Y’) but the **GHI Coverage Start** date is blank, the following warning dialog box displays:

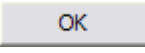
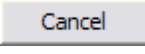


If the Federal tax switch, the State tax switch, or the Pension switch is set to ‘N’, a warning dialog box displays. An example of a warning is shown below:



If the **Pension Code** is set to ‘0’, the following warning dialog box displays:



Step	Action
102	Several conditions may cause the system to display a warning dialog box. For these instances, review the displayed information, and select  (OK) if the information is correct. If the information is incorrect, select  (Cancel), and then make the appropriate modifications to the data fields referenced in the message.

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** PAY01

Status **A** -- **Active**

Emp. no. \_\_\_\_\_ Pay Loc \_\_\_\_\_ Class \_\_\_\_\_  
 Sex Code \_\_\_\_\_ Work Loc \_\_\_\_\_ Job \_\_\_\_\_  
 Mar Stat \_\_\_\_\_ SSN \_\_\_\_\_ EE0-5 Job \_\_\_\_\_  
 Ethnic \_\_\_\_\_

EE0-5 and CPI Ethnic/Race:  
 Hispanic/Latino Ethnicity?

NAME First \_\_\_\_\_ Middle \_\_\_\_\_ Prefix \_\_\_\_\_  
 Last \_\_\_\_\_ Suffix \_\_\_\_\_ Race (Select all that apply)

Address \_\_\_\_\_ Certificate Type \_\_\_\_\_  
 Address L2 \_\_\_\_\_ CS1 Job (from CPI) \_\_\_\_\_  
 City/State \_\_\_\_\_ Include on CPI ? \_\_\_\_\_  
 Zip Code \_\_\_\_\_ County \_\_\_\_\_ Sick Bank ? \_\_\_\_\_  
 Phone ( ) - \_\_\_\_\_ Out of State \_\_\_\_\_ Hours Per Day \_\_\_\_\_  
 Cell phone ( ) - \_\_\_\_\_

Birth Date \_\_\_\_\_ GHI Eligible ? \_\_\_\_\_ Participate in GHI ? \_\_\_\_\_  
 Hire Date \_\_\_\_\_ GHI BOE Trans? \_\_\_\_\_ GHI Option ANTHEM HMO  
 Rehire Date \_\_\_\_\_ GHI 1st Day Wrk \_\_\_\_\_ GHI Tier SINGLE  
 Background \_\_\_\_\_ GHI Coverage Start \_\_\_\_\_ GHI Ded Cd \_\_\_\_\_  
 Term Date \_\_\_\_\_ GHI Change Code \_\_\_\_\_  
 Term Reason \_\_\_\_\_


GHI Email Pref (W or P) \_\_\_\_\_  
 Employee work e-mail: \_\_\_\_\_  
 Employee personal e-mail: \_\_\_\_\_

**Employee: 077788 SMITH, JANE H. was saved.**

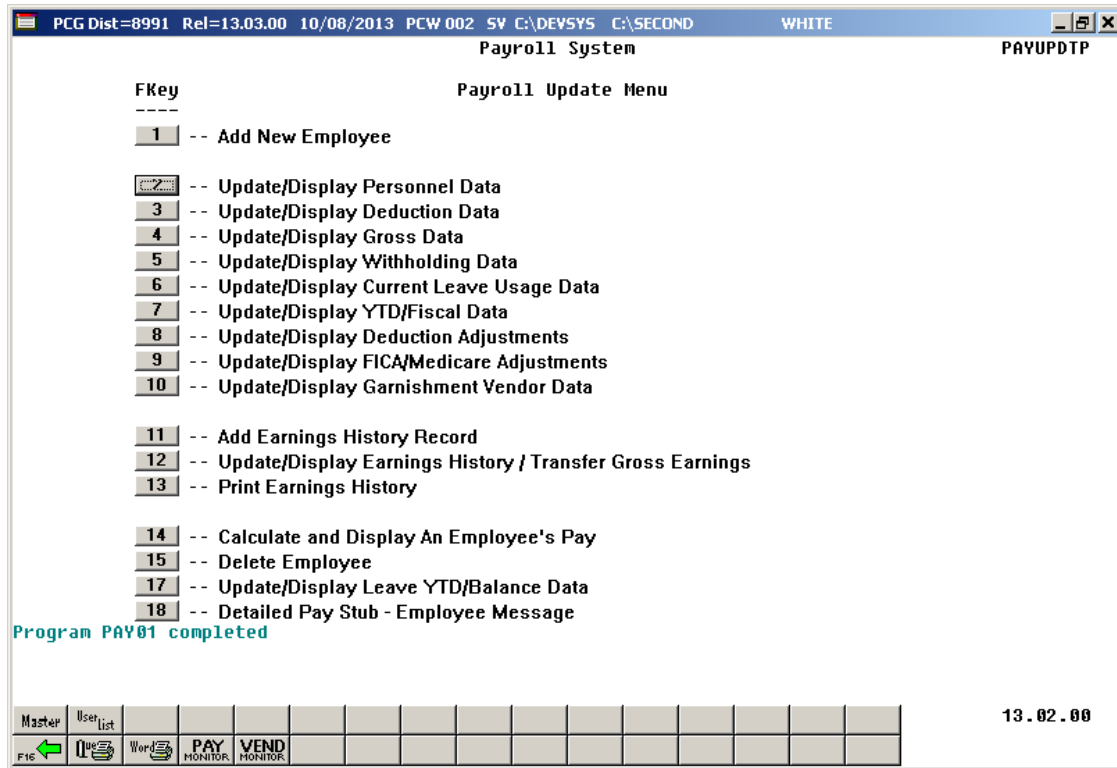
F17=Import new employee data



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

[F16] [F17] [F18] [Help] 22.04.00

Step	Action
<b>103</b>	Verify “Employee: ##### (Employee Name) was saved.” displays, and select  (F16 – Exit) to return to the Payroll System – Payroll Update Menu.

The following screen displays:

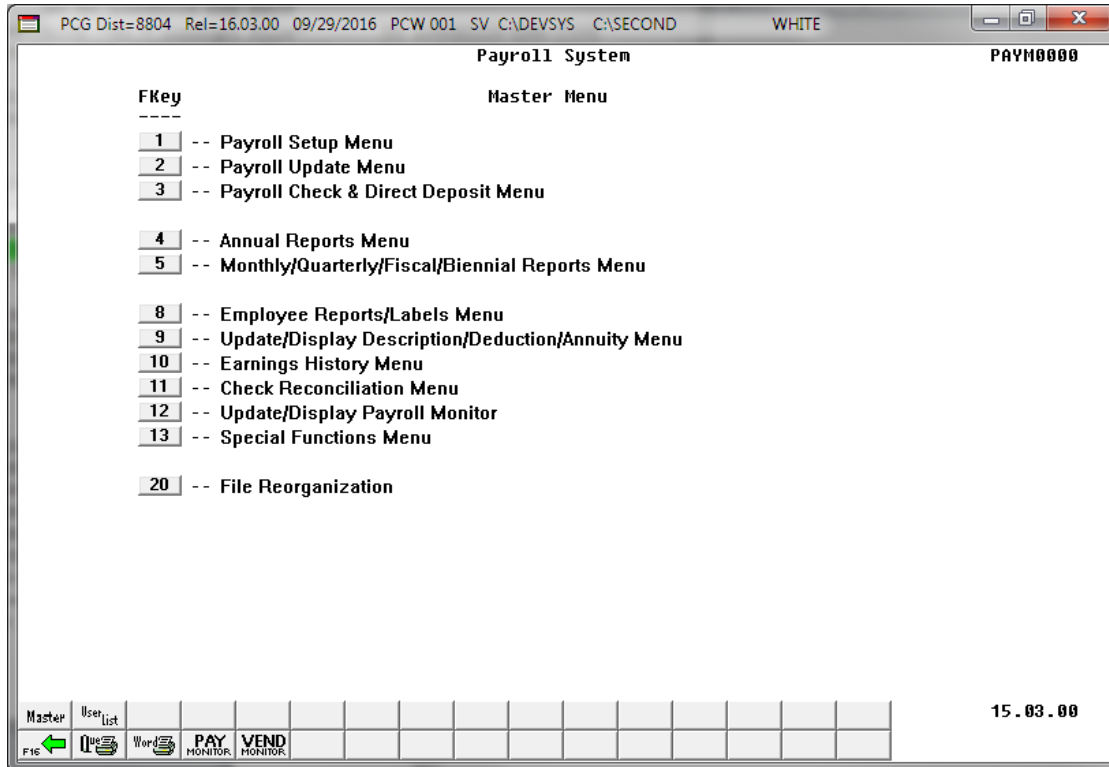


Step	Action
104	Select  (F16 -Exit) to return to the <i>Payroll System Master Menu</i> , or select  ( <b>Master</b> ) to return to the <i>Business Applications Master Menu</i> .

## Procedure C: Converting a Third-Party Contractor Employee to a PCGenesis Payroll Employee

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

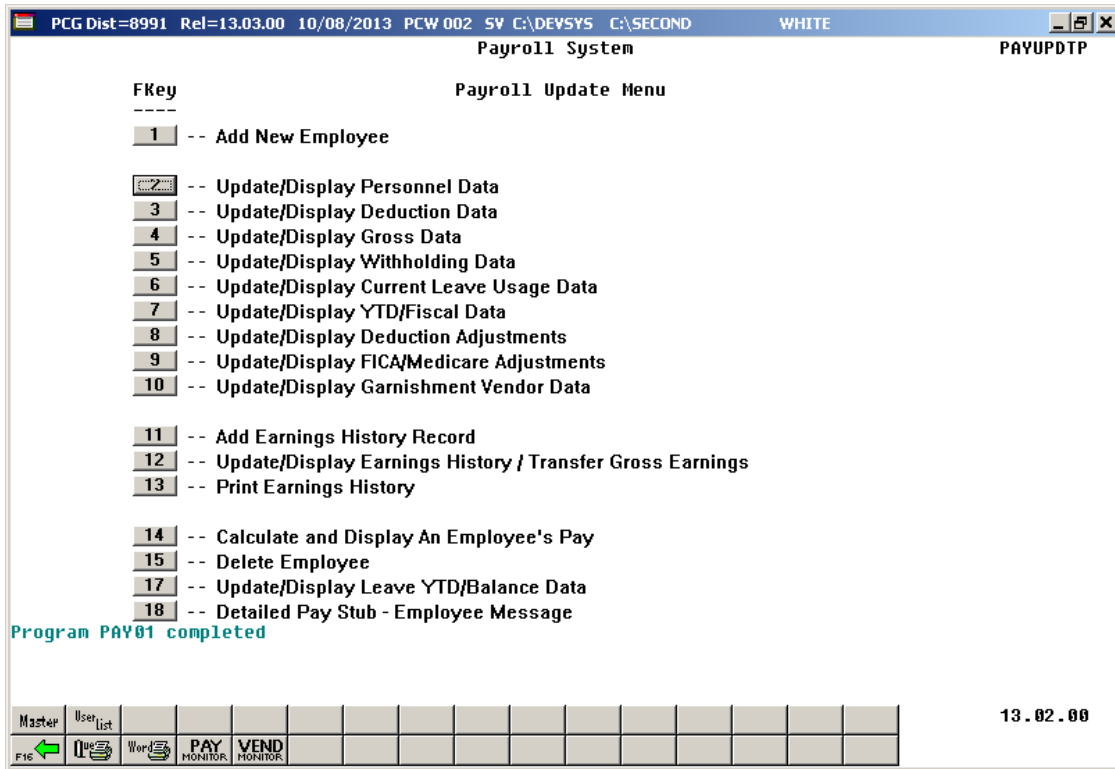
The following screen displays:



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




The following screen displays:

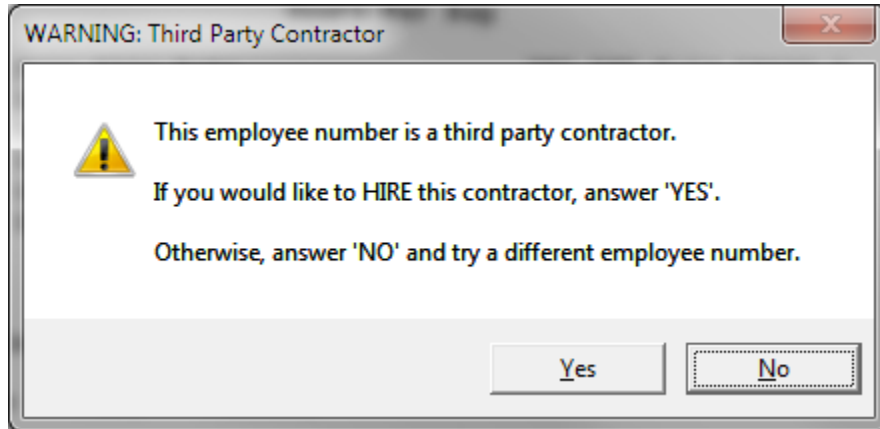


Step	Action
3	Select <b>1</b> (F1 - Add New Employee).

The following screen displays:

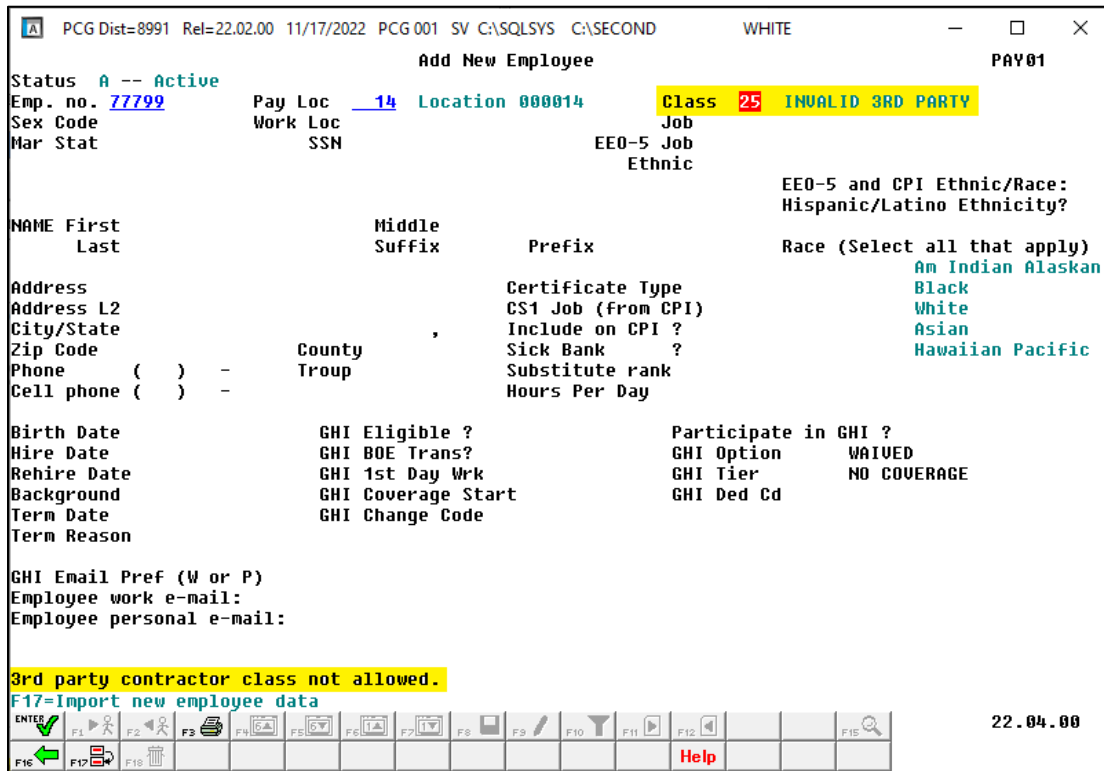
Step	Action
4	PCGenesis automatically defaults to <b>A</b> (Active) in the <b>Status</b> field for all new employee entries.
5	Enter the third-party contractor’s employee number in the <b>Emp. no.</b> (Employee Number) field. <i>The employee number is school district-specific, and must be unique for each employee. Otherwise, if the employee number already exists, “Invalid data, Employee Number on File” displays. In this instance, reenter the correct information in the field and select Enter, or select <b>F16</b> to return to the Payroll System – Payroll Update Menu. If necessary, select <b>F2</b> (Update/Display Personnel Data) to review the existing employee’s information and to determine how to proceed.</i>
6	Select  ( <b>Enter</b> – Validate).


The following dialog box displays:





Step	Action
7	Select <input type="button" value="Yes"/> (Yes) to hire the third-party contractor, otherwise select 'NO', and return to Step 5 to enter a different employee number.



The following screen displays:



Step	Action
8	Enter or verify the location code, or select the drop-down selection icon  in the <b>Pay Loc</b> (Pay Location) field to choose the employee's payroll location.

Step	Action
9	Change the class code from a <i>Third-Party Contractor</i> class code to a valid <u>payroll</u> class code. Enter the class code or select the drop-down selection icon  in the <b>Class</b> field to choose the employee’s pay class.  <i>The class code must exist within the Description file. Refer to Section F: Description/ Deduction/Annuity File Processing for the instructions to create this pay class code where appropriate.</i>
10	Select  ( <b>Enter</b> – Validate).

The following screen displays:

Step	Action
11	Enter and verify fields as described in <i>Procedure B: Adding a New Payroll Employee</i> .
12	Select  ( <b>Enter</b> ) to validate the screen’s entries.  Select  ( <b>F3</b> – Print this data) to obtain a screen print of the <i>Add New Employee</i> screen. The screen print file will be available in the print queue with the name ‘PSCNnnnn’.

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV CASQSYS C\SECOND WHITE

**Add New Employee** PAY01

Status **A** -- Active **SMITH, JANE L**

Emp. no. 77799 Pay Loc 14 Location 000014 Class 7 CERTIFIED 10 MONTH

Sex Code E Work Loc 14 Location 000014 Job 101 GRADE 1

Mar Stat S SSN 777 99 1234 EEO-5 Job 000 Undefined

Ethnic 5 BLACK

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

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

NAME First JANE Middle L  
Last SMITH Suffix \_\_\_\_\_ Prefix MS.

Address 1 EAST FIRST STREET Certificate Type \_\_\_\_\_  
Address L2 \_\_\_\_\_ CS1 Job (from CPI) 000

City/State ATLANTA, GA Include on CPI ? Y

Zip Code 30000 County 141 Sick Bank ? N

Phone ( ) 000-0000 Troup \_\_\_\_\_ Substitute rank \_\_\_\_\_  
Cell phone ( ) 000-0000 Hours Per Day \_\_\_\_\_

Birth Date 12/15/1980 GHI Eligible ? Y Participate in GHI ? Y

Hire Date 1/01/2022 GHI BOE Trans? N GHI Option B2 ANTHEM SILVER

Rehire Date \_\_\_\_\_ GHI 1st Day Wrk 1/01/2022 GHI Tier 10 SINGLE

Background 1/01/2022 GHI Coverage Start \_\_\_\_\_ GHI Ded Cd 9

Term Date \_\_\_\_\_ GHI Change Code NEMP

Term Reason \_\_\_\_\_


GHI Email Pref (W or P) W

Employee work e-mail: J.SMITH@DOE.K12.GA.US

Employee personal e-mail: J.SMITH@GMAIL.COM

**Validations passed. Check screen 2 or save your changes.**

ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15  
F16 F17 F18 Help 22.04.00

Step	Action
13	Verify "Validations passed. Check screen 2 or save your changes." displays, and select  (F11 – Go to Screen 2).



The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/17/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

Add New Employee - Screen 2

Emp. # 77799 SMITH, JANE L Status A Pay Loc 14 Class PAY01

Switches: Federal Y (Y/N) Pay Sch. # 12  
 State Y (Y/N) Pens Code 2 TRS Cycle 3 FIS YR  
 FICA Y (Y/N/M) TRS service ind 1 Pens Elig Date 1/01/2022 Contract mo 10  
 Pension Y (Y/N/R) No pension code 00 TRS/ERS Pens Gross PY contmo 00  
 TRS DOE Paid ERCON (Y/N) Pens Amt/% .0600 Adj Amt/% Hrs/Week 40.00

Proc	Type	Pay Type	Pay Rate	Reg Hrs	Out Hrs	Reg Gr	Out Gr	GHI Dist	Pay Reas
1.	S					2568.00		1.0000	
2.									
3.									
4.									
5.									
Totals						2568.00		1.0000	Total Gross 2568.00


Acct #	Yr	Fnd	F	Prgm	Funct	Objct	Fcty	B	Add'l	Contract	Budget	Flg	Cycle	Gross
Acct #1	23	100		1011	1000	11000	111							50000.00
Acct #2	00													
Acct #3	00													
Acct #4	00													
Acct #5	00													
Totals														

State: Mar Stat B Allowance Mar 0 Dep 0 Withholding Code 0 Amt/% .00  
 Federal: Mar Stat S 2020 W-4? Y (Y or N) Withholding Code 0 Amt/% .00


W-4 Prior to 2020: Exempt 0  
 New 2020 W-4: Box 2 Two jobs flag N Box 4a Other income .00  
 Box 3 Dependent amt .00 Box 4b Deduction amt .00

Validations passed. Check screen 1 or save your changes.

ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F15 22.04.00  
 F16 F17 F18 Help

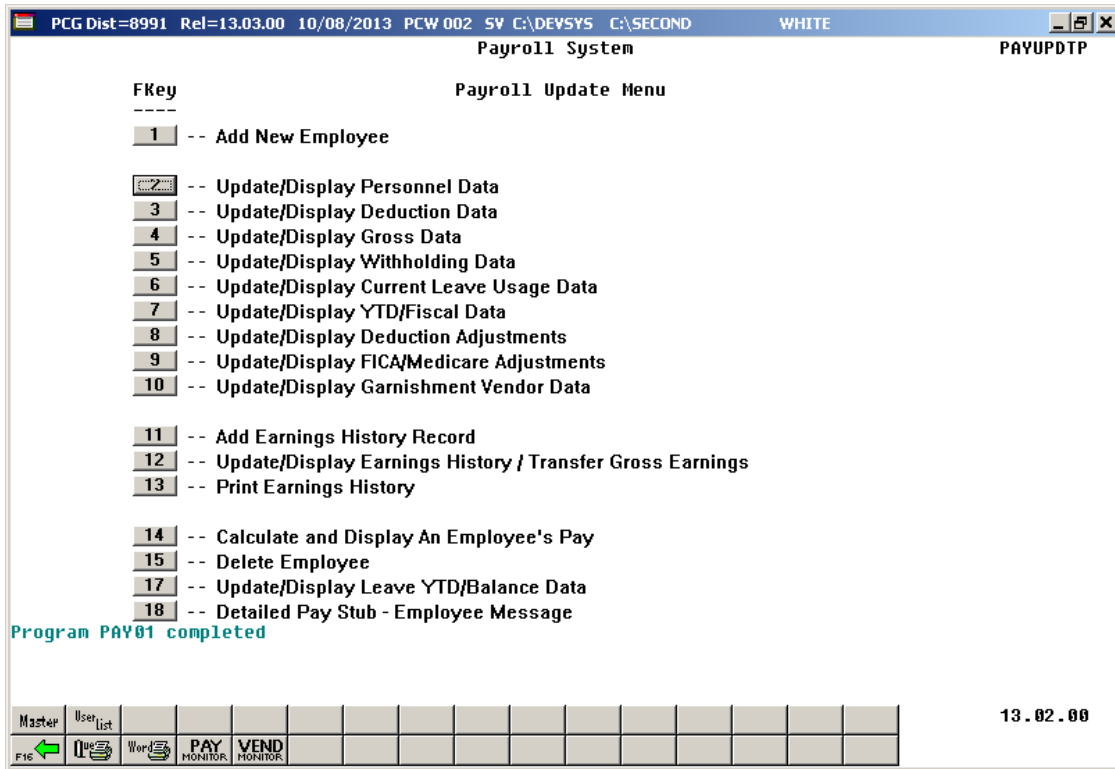
Step	Action
16	Verify "Validations passed. Check screen 1 or save your changes." displays, and select  (F8 – Save changes).



The following screen displays:

Step	Action
17	Verify “Employee: ##### (Employee Name) was saved.” displays, and select  (F16 – Exit) to return to the Payroll System – Payroll Update Menu.



The following screen displays:



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

## Procedure D: New Employee Import Process

Appendix A: *NewEmployee.csv File Formatting and Processing* provides a detailed description of the .csv file and its contents.

### D1. Downloading the PCG\_New\_One\_Employee.xlsx Template

Based on the version of software used, file extensions such as Excel Workbook (\*.xlsx), Excel 97-2003 Workbook (\*.xls), Comma delimited (\*.csv), and Excel 97-2003 Template (\*.xlt), for example, may contain descriptions that differ from this document's instructions. Ensuring that the filename type selected, such as "Workbook", and "Comma-delimited" for example, corresponds to the file type indicated within the instructions however prevents additional processing errors.

Step	Action
1	On the C:\ drive, create a folder entitled <b>PCGNewEmployee</b> , or verify the folder exists.
2	Access the " <b>PCGenesis New Single Employee Template</b> " ( <i>PCG_New_One_Employee.xlsx</i> ) file at the PCGenesis documentation website. Refer to the <i>Payroll System Operations Guide, Section I: Special Functions, Topic 8: Payroll Export and Import File Processing, PCGenesis New Single Employee Template</i> .
3	Save the <i>PCG_New_One_Employee.xlsx</i> template file to the <b>PCGNewEmployee</b> folder created in <i>Step 1</i> . Copy the <i>PCG_New_One_Employee.xlsx</i> template file to <u>each workstation</u> in which PCGenesis users will create and upload new employees.

## D1.1. PCG\_New\_One\_Employee.xlsx Template – Example

PCGenesis New Employee Form		v 10.00	
<p><b>NOTE: Commas may not be entered into any input field.</b>  <b>All dates must be in MM/DD/CCYY format.</b></p>			
E1	Employee number	Active/Inactive	(A or I)
E2	Pay location	Work location	Job code
E3		Sick bank	Hours per day
			Substitute Rank
<b>Name and Address Fields</b>			
N1	Name: first - Middle - Last		
N2	Name: Prefix - Suffix		
A1	Addr: Line 1		
A2	Addr: Line 2		
A3	Addr: City - St - Zip	County Code	
A4	Addr: Work Email	Phone	
A5	Addr: Personal Email	Cell Phone	
Digits only. No dashes, etc			
<b>Personnel Fields</b>			
I1	Hire date	Birth date	Gender
I2	Background date	EEO-5 Job	Marital status
(MM/DD/CCYY) (M or F) (M or S)			
I3	Ethnic code	Hispanic	Am Indian Black White Asian Hawaiian CPI?
(Y or N) At least one race code must be selected. Valid values are Y or N. (Y or N)			
<b>Pension Fields</b>			
P1	Pension switch	Pens eligible date	Pension code
P2			Service indicator
(Y or N) (MM/DD/CCYY) (0 = None 1 = Old PSERS 0 = Out of service 2 = TRS 4 = New ERS 1 = In service ) 5 = New PSERS ) No Pension code			
<b>Tax Fields</b>			
T1	FICA:	Switch	Marital
T2	Federal:	Status	W/H code/Withholding Amount/Percent
T3	State:	Additional	
(Y or N or N (Fed: S/M/H (0, 1, 2, 3) (1 & 2 require amount. 3 requires percentage.) (State: A,B,C, D,E,8)			
T4	Federal 2020 W-4: Two jobs?	Depend amount	Other income
Deduct amount			
<b>Salary Fields</b>			
S1	State salary	Cycle gross	Cycle code
S2	Local salary	Contract amount	
S3	Other salary	Contract months	PY cont mo
(09 or 10 or 11 or 12) (1 = Calendar Year 2 = School Year 3 = Fiscal Year ) (09, 10, 11, or 12)			
<b>State Health Fields</b>			
H1	GHI eligible?	GHI 1st day worked	Deduction code
H2	Participate?	overage Start Date	Option
H3	Hours per week	GHI Email Pref	BOE Transfer
(Y or N) (Y or N) (MM/DD/CCYY) (P or W) (Y = BOE Transfer N = Not a BOE transfer D = Don't know )			

Line Codes are in Column A.

***Note:** The **Employee Number, Pay Location, and Class code** fields are required, and these fields must be correct and accurate before the export file will load.*

***Note:** The PCGenesis New Employee Form template is version **10.00**.*


## D2. Saving the PCG\_New\_One\_Employee.xlsx Template as a Microsoft® Excel Spreadsheet/Workbook

Step	Action
1	Verify the <i>PCG_New_One_Employee.xlsx</i> template exists within <b>C:\PCGNewEmployee</b> . <i>If the file or folder does not exist, refer to D1. Downloading the PCG_New_One_Employee.xlsx Template for the instructions.</i>
2	Within Microsoft® Excel, access and open <i>PCG_New_One_Employee.xlsx</i> template file.

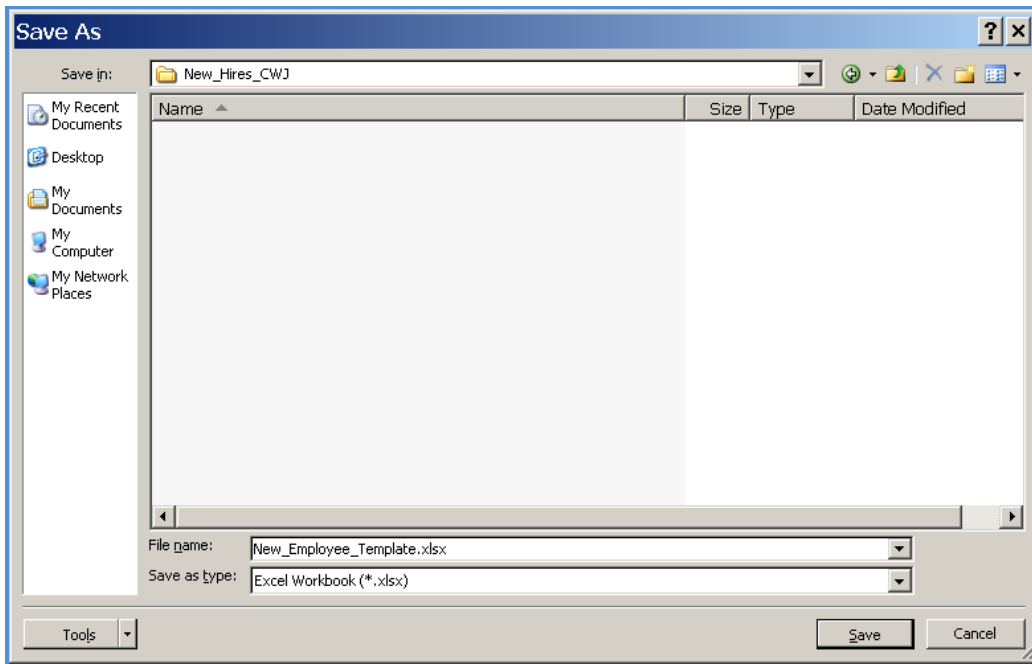
The following window displays:



The screenshot displays the Microsoft Excel interface with the 'PCGenesis New Employee Form' template open. The spreadsheet is organized into sections for data entry:

- General Information:** Employee number, Active/Inactive status, SSN, Class code, Pay location, Work location, Job code, CS1 Job (from CPI), Sick bank, Hours per day, and Substitute Rank.
- Name and Address Fields:** Name (first, middle, last, prefix, suffix), Address (line 1, line 2, city-st, zip, work email, personal email), and County Code, Phone, Cell Phone.
- Personnel Fields:** Hire date, Birth date, Gender, Marital status, Background date, EEO-5 Job, Ethnic code, and various race categories (Hispanic, Am Indian, Black, White, Asian, Hawaiian).
- Pension Fields:** Pension switch, Pens eligible date, Pension code, and Service indicator.
- Tax Fields:** FICA (Federal, State), Exemptions, Marital allow, Dependent allow, and Federal 2020 W-4 details.
- Salary Fields:** State salary, Local salary, Other salary, Cycle gross, Contract amount, Contract months, and Cycle code.
- State Health Fields:** GHI eligible?, Participate?, Hours per week, 3HI 1st day worked, GHI Email Pref, Deduction code, Option, and Tier.

Step	Action
3	Select  ( <b>Save</b> ), or from the <i>Menu Bar</i> , select <b>File</b> → <b>Save As</b> .
4	<p>Within the <b>Save in:</b> field, navigate to the <b>C:\PCGNewEmployee</b> folder, or to the appropriate file location.</p> <p><i>Within the screenshot examples, a folder entitled “New_Hires_CWJ” was created to easily identify the user’s new employee files.</i></p>

The following window displays:



Step	Action
5	<p><b>Optional:</b> Enter <b>NewEmployeeTemplate</b> in the <b>File name</b> field.</p> <p><i>This step is optional. Saving the files in this step provides a safeguard against the selection of the wrong template file during the import process while maintaining the integrity of the original template.</i></p>
6	<p>Verify the selection of, or select the drop-down selection icon  within the <b>Save as type</b> field to choose <i>Microsoft Excel Workbook (.xlsx)</i>.</p> <p><i>Saving the file initially as a Microsoft® Excel spreadsheet/workbook simplifies making modifications for PCGenesis users.</i></p>
7	Select  ( <b>Save</b> ).

## D3. Using the PCGenesis Template to Create a New Employee

**\*\*\*IMPORTANT\*\*\***

**Do not enter commas (,) in any of the Microsoft® Excel spreadsheet's data fields as doing so creates incompatibilities with the .csv file's format.**

Step	Action
1	Access the Microsoft® Excel spreadsheet/workbook saved in D2. Saving the PCG_New_One_Employee.xlsx Template as a Microsoft® Excel Spreadsheet/Workbook.
2	Enter employee data into the spreadsheet/workbook.

The following window displays:

The screenshot shows the 'PCGenesis New Employee Form' within an Excel spreadsheet. The form is organized into several sections:

- General Information:** Employee number, Active/Inactive status, SSN, Class code, Pay location, Work location, Job code, CS1 Job (from CPI), Sick bank, Hours per day, Substitute Rank.
- Name and Address Fields:** Name (first, middle, last, prefix, suffix), Address (line 1, line 2), City, State, Zip, County Code, Phone, Cell Phone, Personal Email.
- Personnel Fields:** Hire date, Birth date, Gender, Marital status, Background date, EEO-5 Job, Ethnic code, Hispanic, Am Indian, Black, White, Asian, Hawaiian, CPI?
- Pension Fields:** Pension switch, Pens eligible date, Pension code, Service indicator.
- Tax Fields:** FICA (Federal, State), Marital status, W/H code, Withholding Amount/Percent, Exemptions, 2020 W-4?, Federal 2020 W-4: Two jobs?, Depend amount, Other income, Deduct amount.
- Salary Fields:** State salary, Local salary, Other salary, Cycle gross, Contract amount, Contract months, Cycle code, PY cont. mo.
- State Health Fields:** GHI eligible?, Participate?, Hours per week, GHI 1st day worked, overage Start Date, GHI Email Pref, Deduction code, Option, BOE Transfer, Tier.

Step	Action
<b>Line Code E1 Fields</b>	
3	<p>Enter the employee number in the <b>Emp. no.</b> (Employee Number) field.</p> <p><i>The employee number is school district-specific, and must be unique for each employee. The <b>Employee Number</b> is required, and must be correct and accurate before the export file will load.</i></p>
4	<p>Verify or enter <b>A</b> (Active) or <b>I</b> (Inactive) in the <b>Active/Inactive</b> field to identify the employee's status.</p> <p><i>Note: <b>T</b> (Terminated) is not a valid status code for a new employee, and will cause an error during processing.</i></p>
5	<p>Enter the employee's social security number in the <b>SSN</b> (Social Security Number) field in either of the following two formats:</p> <ul style="list-style-type: none"> <li>• Eleven (11) alphanumeric characters representing the employee's social security number in the format <b>###-##-####</b> (with dashes).</li> <li>• Nine (9) digits representing the social security number in the format <b>#####</b> (without dashes).</li> </ul> <p><i>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. PCGenesis automatically updates this information for the employee's earnings history information.</i></p>
6	<p>Enter the class code in the <b>Class</b> field to choose the employee's pay class.</p> <p><i>The <b>Class</b> code is required, and must be correct and accurate before the export file will load.</i></p>
<b>Line Code E2 Fields</b>	
7	<p>Enter the location code in the <b>Pay Location</b> field to choose the employee's payroll location.</p> <p><i>The <b>Pay Location</b> code is required, and must be correct and accurate before the export file will load.</i></p>
8	<p>Enter the location code in the <b>Work Location</b> field to choose the employee's primary work location code.</p>
9	<p>Enter the job code in the <b>Job Code</b> field to choose the employee's job classification.</p>
10	<p>Enter the employee's CPI job code in the <b>CS1 Job (from CPI)</b> field.</p> <p><i>The GaDOE provides a complete listing of CPI job codes at <a href="http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes01.entry_form">http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes01.entry_form</a>.</i></p>



Step	Action
<b>Line Code E3 Fields</b>	
11	<b>Sick Bank:</b> Enter <b>Y</b> (Yes – Employee is enrolled in the system sick bank) or <b>N</b> (No – Employee is not enrolled in the system sick bank) in the field.
12	Enter the number of hours per day the employee works in the <b>Hours Per Day</b> field.
13	Enter the substitute’s rank in the <b>Substitute Rank</b> field to choose the employee’s substitute rank.  <i>The <b>Substitute Rank</b> code is necessary when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.</i>
<b>Line Code N1 Fields</b>	
14	Enter the employee’s first name and middle name or middle initial, up to fifteen (15) characters each in the <b>(NAME) First</b> and <b>(NAME) Middle</b> fields.  <i>The First name is a required field. The Middle name or initial is an optional field.</i>
15	Enter the employee’s last name, up to twenty (20) characters in the <b>(NAME) Last</b> field.  <i>The last name field is a required field.</i>
<b>Line Code N2 Fields</b>	
16	Enter the employee’s professional title in the <b>(NAME) Prefix</b> field.  <i>PCGenesis uses this field for such processes as contract processing. An example of an entry would include Dr. (Doctor).</i>
17	Enter the suffix for the employee’s name in the <b>Suffix</b> field.  <i>Examples of this entry include Sr. (Senior) or Jr. (Junior).</i>
<b>Line Code A1 and A2 Fields</b>	
18	Enter the employee’s street/mailling address, up to thirty (30) characters per field, in the <b>Address Line 1</b> and <b>Address Line 2</b> fields.
19	<b>SHBP/GHI (Required):</b> Enter the county of residence code in the <b>County</b> field.  <i>Refer to the “Georgia County Code Listing” for a complete listing of Georgia counties and county codes.</i>

Step	Action
<b><i>Line Code A3 Fields</i></b>	
20	Enter the employee's city in the first field, up to twenty-six (26) characters, and the two-character state code in the second <b>City/State</b> field. <i>Do NOT enter a comma (,) to separate the two entries.</i>
21	Enter the employee's postal code, including the <i>Zip+4</i> postal codes where appropriate, in the <b>Zip code</b> field.
22	Enter the employee's telephone number including the area code, up to ten (10) digits, in the <b>Phone</b> field. Enter digits only, no dashes.
<b><i>Line Code A4 Fields</i></b>	
23	Enter the employee's work e-mail address, up to fifty (50) characters, in the <b>Work E-mail</b> field. <i>The e-mail address must contain one '@' sign.</i>
24	Enter the employee's cell phone number including the area code, up to ten (10) digits, in the <b>Cell Phone</b> field. Enter digits only, no dashes.
<b><i>Line Code A5 Fields</i></b>	
25	Enter the employee's personal e-mail address, up to fifty (50) characters, in the <b>Personal E-mail</b> field. <i>The e-mail address must contain one '@' sign.</i>
<b><i>Line Code I1 Fields</i></b>	
26	Enter the employee's <u>initial</u> hire date (MM/DD/CCYY) in the <b>Hire Date</b> field.
27	Enter the employee's date of birth (MM/DD/CCYY) in the <b>Birth Date</b> field.
28	Enter <b>F</b> (Female) or <b>M</b> (Male) in the <b>Gender</b> field to identify the employee's gender.
29	Enter <b>M</b> (Married) or <b>S</b> (Single) in the <b>Marital Status</b> field.
<b><i>Line Code I2 Fields</i></b>	
30	Enter the employee's background-check date (MM/DD/CCYY) in the <b>Background Check Date</b> field.
31	Enter the code in the <b>EEO-5 Job</b> field to choose the employee's EEO-5 job code. <i>The <b>EEO-5 Job</b> code is necessary in order to support EEO-5 reporting and file transmission to the Federal government.</i>

Step	Action
<b>Line Code I3 Fields</b>	
32	Enter the ethnic code in the <b>Ethnic Code</b> field to choose the employee’s ethnicity. <i>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.</i>
33	<b>EEO-5 and CPI Ethnic/Race:</b> Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>Hispanic</b> field to identify whether or not the employee is of Hispanic descent.
34	<b>EEO-5 and CPI Ethnic/Race:</b> Enter <b>Y</b> (Yes) or <b>N</b> (No) in the appropriate race fields: <b>Am Indian</b> (American Indian), <b>Black</b> , <b>White</b> , <b>Asian</b> , <b>Hawaiian</b> to identify an employee’s ethnicity. <i>At least one response must be Y (Yes).</i>
35	Enter <b>Y</b> (Yes) or <b>N</b> (No) in the <b>CPI?</b> field to identify the employee’s inclusion in, or exclusion from CPI reporting.
<b>Line Code P1 Fields</b>	
36	Enter the appropriate response or code in the <b>Pension Switch</b> field: Valid entries include <b>Y</b> (Compute Pension), <b>N</b> (Do not Compute Pension), and <b>R</b> (TRS only: Employer pays both employer and employee shares – SB327).
37	Enter the date (MM/DD/CCYY) on which the employee becomes eligible to participate in the school district’s retirement plan in the <b>Pens Eligible Date</b> (Pension Eligibility Date) field.
38	Enter the appropriate code in the <b>Pension Code</b> field: Valid entries include <b>0</b> (No Pension Participation), <b>1</b> (Old PSERS Participation), <b>2</b> (TRS Pension Participation), <b>3</b> (Old ERS Participation), <b>4</b> (New ERS Participation), <b>5</b> (New PSERS Participation) or <b>6</b> (GSEPS Participation).
39	Enter <b>0</b> (No Service Credit) or <b>1</b> (Service Credit Earned for month) in the <b>Service Indicator</b> field.
<b>Line Code P2 Fields</b>	
40	Enter the code in the <b>No pension code</b> field to choose the reason for no public pension. The <b>No pension code</b> field has been added to support the new <i>Pension Reporting Compliance File</i> required by ERSGA. A valid value must be entered in the <b>No Pension Code</b> field when the employee’s <b>Pension Code</b> is set to ‘0’, no pension. If the employee is enrolled in a public pension ( <b>Pension Code</b> values of ‘1’ thru ‘6’), then the <b>No Pension Code</b> value must be ‘00’.

Step	Action
<b><i>Line Code T1 Fields</i></b>	
41	<p>Enter the appropriate response or code in the <b>FICA Tax Switch</b> (Federal Insurance Contributions Act Tax Switch) field:</p> <p>Valid Values:        <b>Y</b> = Compute OASDI/Medicare                                     <b>N</b> = Do NOT compute OASDI/Medicare                                     <b>M</b> = Compute Medicare only</p>
<b><i>Line Code T2 Fields</i></b>	
42	<p>Enter the appropriate response in the <b>Federal Tax Switch</b> field:</p> <p>Valid Values:        <b>Y</b> = Compute withholding                                     <b>N</b> = Do NOT compute withholding</p>
43	<p>Verify or enter the employee's federal income tax marital status code in the <b>Federal: Marital Status</b> field.</p> <p>Valid Values:        <b>M</b> = Married                                     <b>S</b> = Single                                     <b>H</b> = Head of Household (valid for 2020 W-4 or later)</p>
44	<p>Verify or enter the employee's federal income tax withholding code in the <b>Federal: W/H Code</b> (withholding code) field:</p> <p>Valid Values:        <b>0</b> = Normal Federal tax from tax table                                     <b>1</b> = Normal Federal tax from tax table + flat amount                                     <b>2</b> = Flat amount only                                     <b>3</b> = Flat percentage only</p>
45	<p>The <b>Federal Additional Withholding Amount/Percent</b> field is used in conjunction with the <b>Federal Withholding Code</b>. If the <b>Federal Additional Withholding Amount/Percent</b> value is a whole number, it will be treated as a flat amount (codes 1 &amp; 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the employee's additional federal income tax amount <u>or</u> the tax percentage in the <b>Federal Additional Withholding Amount/Percent</b> field, where appropriate.</p> <p><i>Required for Federal Withholding Code entries of 1, 2, or 3. Values less than 1.00 are regarded as percentages (%).</i></p>
46	<p><b>W-4 Prior to 2020:</b> Verify or enter the number of federal income tax exemptions in the <b>Federal: Exemptions</b> field.</p> <p><i>When the number of federal income tax exemptions exceeds ten (10), submit the employee's W-4 form to the Internal Revenue Service. Refer to Line 5 of the W-4 form for the Federal: Exempt field's information.</i></p>


Step	Action
47	Enter the appropriate response in the <b>2020 W-4?</b> field. Valid Values: <b>Y</b> = Employee’s W-4 form is from 2020 or later <b>N</b> = Employee’s W-4 form is from prior to 2020
<b>Line Code T3 Fields</b>	
48	Enter the appropriate response in the <b>State Tax Switch</b> field. Valid Values: <b>Y</b> = Compute withholding <b>N</b> = Do NOT compute withholding
49	Verify or enter the employee’s state income tax marital status code in the <b>State: Marital Status</b> field. Valid Values: <b>A</b> = Single <b>B</b> = Married Filing Separate, or Married Filing Joint, both spouses working <b>C</b> = Married Filing Joint, one spouse working <b>D</b> = Head of Household <b>8</b> = Exempt – Servicemembers Civil Relief Act  A marital status of ‘8’ will cause all wages to be exempt from reporting for Georgia state wages, and will cause zero Georgia tax to be withheld from the employee’s paycheck. The <i>Department of Labor Quarterly Payroll Report and Wages Data File</i> , and the W-2 forms will both treat any wages on the Earnings History records with a Georgia marital status of ‘8’ as Georgia exempt wages, and these wages will not be included in these tax reports.
50	Verify or enter the state income tax withholding code in the <b>State: W/H Code</b> (withholding code) field. Valid Values: <b>0</b> = Normal state tax from tax table <b>1</b> = Normal state tax from tax table + flat amount <b>2</b> = Flat amount only <b>3</b> = Flat percentage only
51	The <b>State Additional Withholding Amount/Percent</b> field is used in conjunction with the <b>State Withholding Code</b> . If the <b>State Additional Withholding Amount/Percent</b> value is a whole number, it will be treated as a flat amount (codes 1 & 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the additional state income tax amount <u>or</u> the total percentage in the <b>State Additional Withholding Amount/Percent</b> field, where appropriate.  <i>Required for State Withholding Code entries of 1, 2, or 3. Values less than 1.00 are regarded as percentages (%).</i>

Step	Action
52	<p>Verify or enter the total number of marital allowances from Line 5 of the G-4 form in the <b>State: Marital Allow</b> (State: Marital Allowance) field.</p> <p>Verify or enter the number dependent allowances (Line 4 of the G-4 form) in <b>State: Dependent Allow</b> (State: Dependent Allowance) field.</p> <p><u>NOTE:</u> As of 2024, the Georgia withholding formula does <u>not</u> use a <b>Marital Allowance</b>. Even though this field is still available on the employees' <i>Update/Display Withholding Data</i> screen, the <b>Marital Allowance</b> value will be ignored.</p> <p><i>When the number of State of Georgia income tax exemptions exceeds fourteen (14), submit the employee's G-4 form to the Georgia Department of Revenue. Refer to Line 4 and Line 5 of the G-4 form for State: Marital Allowance information.</i></p>
<b>Line Code T4 Fields</b>	
53	<p><b>New 2020 W-4: Two jobs flag.</b> If the <b>2020 W-4?</b> field value is 'Y', enter 'Y' if the employee has checked the <i>Step 2</i> checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household.</p> <p>Valid Values:            <b>Y</b> = <i>Step 2</i> checkbox is checked on the 2020 W-4                                    <b>N</b> = <i>Step 2</i> checkbox is <u>not</u> checked on the 2020 W-4</p>
54	<p><b>New 2020 W-4: Depend amount</b> (dependent amount). If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 3</i> of the 2020 W-4 form as the amount claimed for dependents.</p>
55	<p><b>New 2020 W-4: Other income.</b> If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4a</i> of the 2020 W-4 form as the amount claimed for other income.</p>
56	<p><b>New 2020 W-4: Deduct amount</b> (deduction amount). If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4b</i> of the 2020 W-4 form as the amount claimed for deductions.</p>
<b>Line Code S1 Fields</b>	
57	<p>Enter the employee's State of Georgia-funded annual salary in the <b>State Salary</b> field.</p>
58	<p>Enter the employee's cycle gross salary in the <b>Cycle Gross</b> field.  <i>Enter Certified employees' cycle gross information in the Cycle Gross field.</i></p>
59	<p>Enter the appropriate code in the <b>Cycle Code</b> for year-to-date amount accumulations.  <i>Valid entries include 1 (Calendar Year), 2 (School Year) and 3 (Fiscal Year).</i></p>
<b>Line Code S2 Fields</b>	
60	<p>Enter the employee's locally funded annual salary in the <b>Local Salary</b> field.</p>
61	<p>Enter the employee's contractual total dollar amount in the <b>Contract Amount</b> field.</p>

Step	Action
<b>Line Code S3 Fields</b>	
62	Enter the employee's additional annual salary in the <b>Other Salary</b> field.
63	Enter the total number of contract months the employee <u>works</u> in the <b>Contract Months</b> field. <i>For Contract Months field entries, PCGenesis requires an entry in the Contract Amount field at Step 61.</i>
64	Enter the total number of contract months the employee <u>worked</u> during the prior year in the <b>Prior Year Contract Months</b> field.
<b>Line Code H1 Fields</b>	
65	<b>GHI Eligible?</b> field (Required for SHBP/GHI reporting): Enter <b>Y</b> (Yes – Employee is eligible to receive benefits) or <b>N</b> (No – Employee is not eligible to receive benefits) in the field to choose the employee's plan eligibility.
66	<b>GHI 1<sup>st</sup> Day Wrk</b> (GHI 1 <sup>st</sup> Day Worked) field – Required if the <b>GHI Eligible?</b> field is set to 'Y'. Enter the first date (MM/DD/CCYY) for which the employee is compensated.
67	<b>GHI Deduction Code</b> field - Required if the <b>Participate in GHI?</b> field is set to 'Y'. Enter the system deduction code which represents the SHBP/GHI deduction. <i>An invalid entry in this field will generate the "Deduction Code not valid or not set up as SHBP Deduction" message. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions on the entry of this code.</i>
<b>Line Code H2 Fields</b>	
68	<b>Participate?</b> field (For Classified and Substitute Employees): Enter <b>Y</b> (Yes – Employee participates in SHBP) or <b>N</b> (No – Employee does not participate in the SHBP) to choose the employee's plan participation. <ul style="list-style-type: none"> <li>• Enter <b>N</b> (No) if the <b>GHI Option</b> field will be <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and the <b>GHI Tier</b> field will be <b>00</b> (No Coverage).</li> <li>• Enter <b>Y</b> (Yes) if the employee <b>GHI Option</b> and the <b>GHI Tier</b> fields will be codes other than <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible), and <b>00</b> (No Coverage).</li> </ul> <p>Starting <b>July 1, 2012</b>, Direct Billing for certificated employees covered by SHBP takes effect. SHBP moves from a percentage of state-based salaries for every SHBP-eligible certificated employee and instead begins paying a "direct" per member per month (PMPM) rate (i.e., a flat rate) for each certificated employee <i>enrolled</i> in the SHBP. <i>Therefore, an employer contribution will NOT be billed for employees with a <b>GHI Option</b> field of <b>NC</b> (No Coverage) or <b>NE</b> (Not Eligible).</i></p>





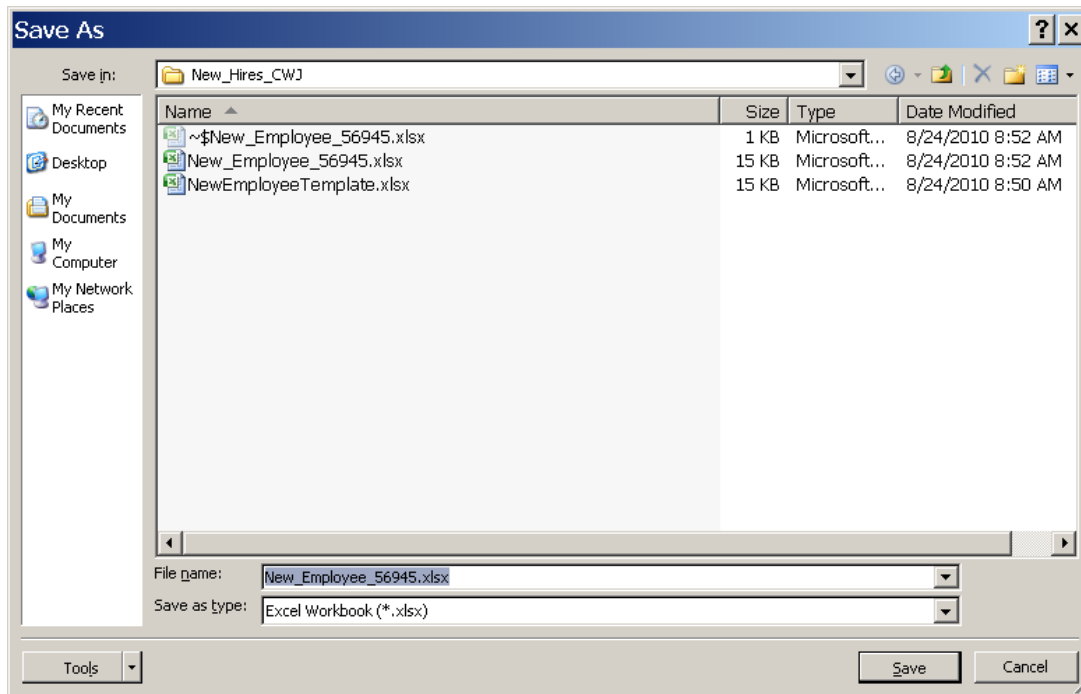
Step	Action
74	<p><b>GHI BOE Trans?</b> (GHI Board of Education Transfer) field – Required if the <b>GHI Eligible?</b> field is set to ‘Y’.</p> <p>Indicate whether or not the employee transferred from another school district.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li><b>Y</b> – Yes, the employee transferred from another school district</li> <li><b>N</b> – No, the employee did not transfer from another school district</li> <li><b>D</b> – Don’t know whether or not the employee transferred from another school district</li> </ul> <p>The <b>GHI BOE Trans?</b> field is mostly informational; however, this data should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly. If the <b>GHI BOE Transfer</b> field is set to ‘Y’, but a <b>GHI Coverage Start Date</b> has not been entered, a <u>warning</u> message will be printed on the report.</p>
<i>Complete Spreadsheet Entry</i>	
75	<p>Select  (<b>Save</b>), or from the <i>Menu Bar</i>, select <b>File → Save</b>.</p>
76	<p>Proceed to <i>D4. Modifying and Saving the PCG_New_One_Employee.csv File in Microsoft® Excel</i>.</p>


## D4. Modifying and Saving the PCG\_New\_One\_Employee.csv File in Microsoft® Excel

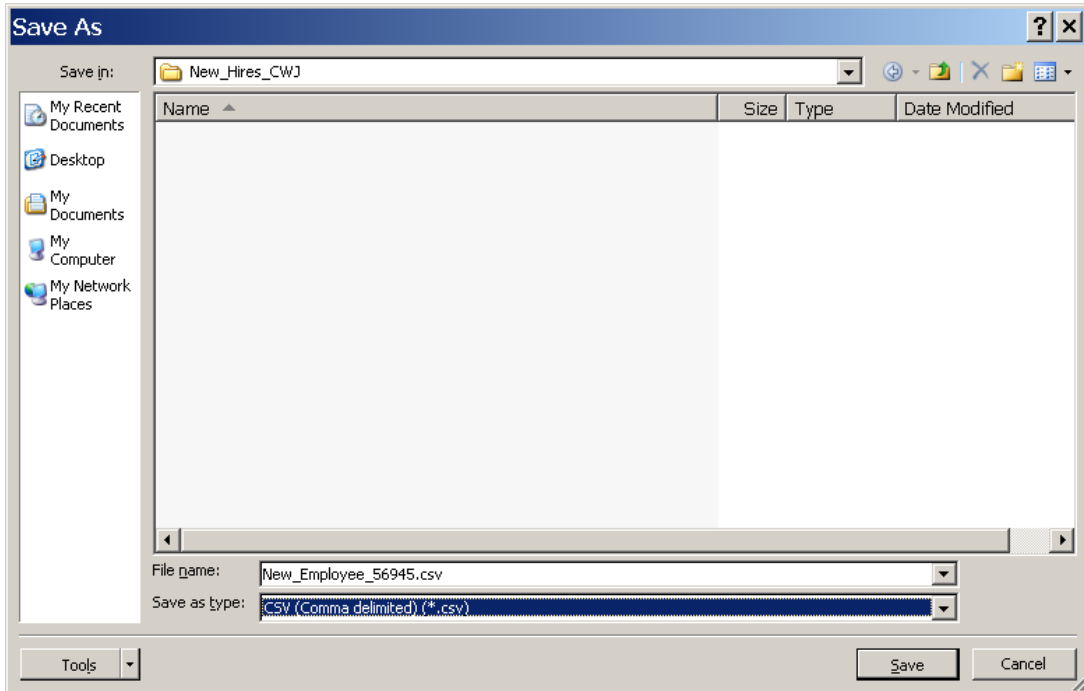
Saving the Microsoft® Excel spreadsheet/workbook as a comma-delimited (.csv) file allows PCGenesis to read the NewEmployeeTemplate.xlsx template's data.

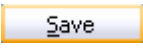
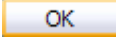
Step	Action
1	Access the Microsoft® Excel spreadsheet/workbook saved in D3. Using the PCGenesis Template to Create a New Employee.
2	From the <i>Menu Bar</i> , select <b>File</b> → <b>Save As</b> .
3	Within the <b>Save in:</b> field, navigate to the <b>New_Hires_CWJ</b> or to the appropriate file location.

The following window displays:

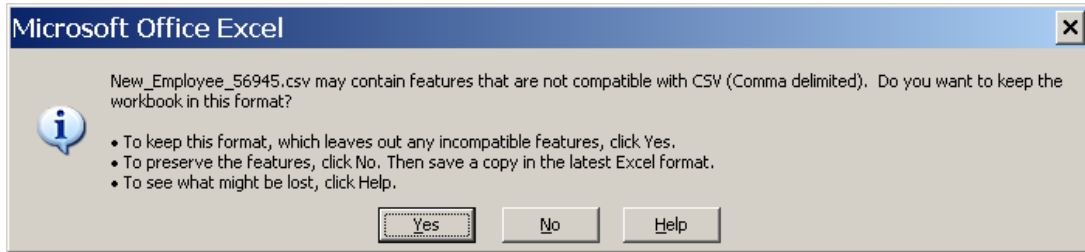


Step	Action
4	Select the drop-down selection icon  within the <b>Save as type</b> field and select CSV ( <i>Comma delimited</i> )(*.csv).
5	Verify or enter <b>NewHireFilename.csv</b> in the <b>File name</b> field, where “ <i>NewHireFilename</i> ” is the file saved using the naming convention covered previously. <i>It is not necessary for the user to change the defaulting filename in this step.</i>



Step	Action
6	Select  ( <b>Save</b> ). <i>If the “Microsoft Office Excel – The selected file type does not support workbooks that contain multiple sheets.” dialog box displays, select  (OK).</i>

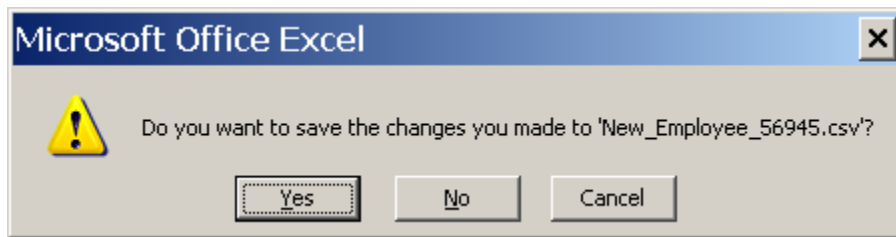
The following dialog box displays:



Do not become alarmed, this dialog box always displays.

Step	Action
7	Select <input type="button" value="Yes"/> (Yes).
8	From the <i>Menu Bar</i> , select <b>File</b> → <b>Close</b> to close the current file <u>or</u> select <b>File</b> → <b>Exit</b> to completely exit Microsoft® Excel.  <i>The .csv file must be closed before it can be imported into PCGenesis.</i>

The following dialog box displays:



Step	Action
9	<b>If no additional modifications were made since Step 6:</b> Select <input type="button" value="No"/> (No).  <b>For additional modifications since Step 6:</b> Select <input type="button" value="Yes"/> (Yes), and repeat <i>Steps 1 – 8</i> to save the file.

## D5. Importing the PCG\_New\_One\_Employee.csv File into PCGenesis

### D5.1. Performing a PCGenesis Data Backup



**\*\*\* ATTENTION \*\*\***

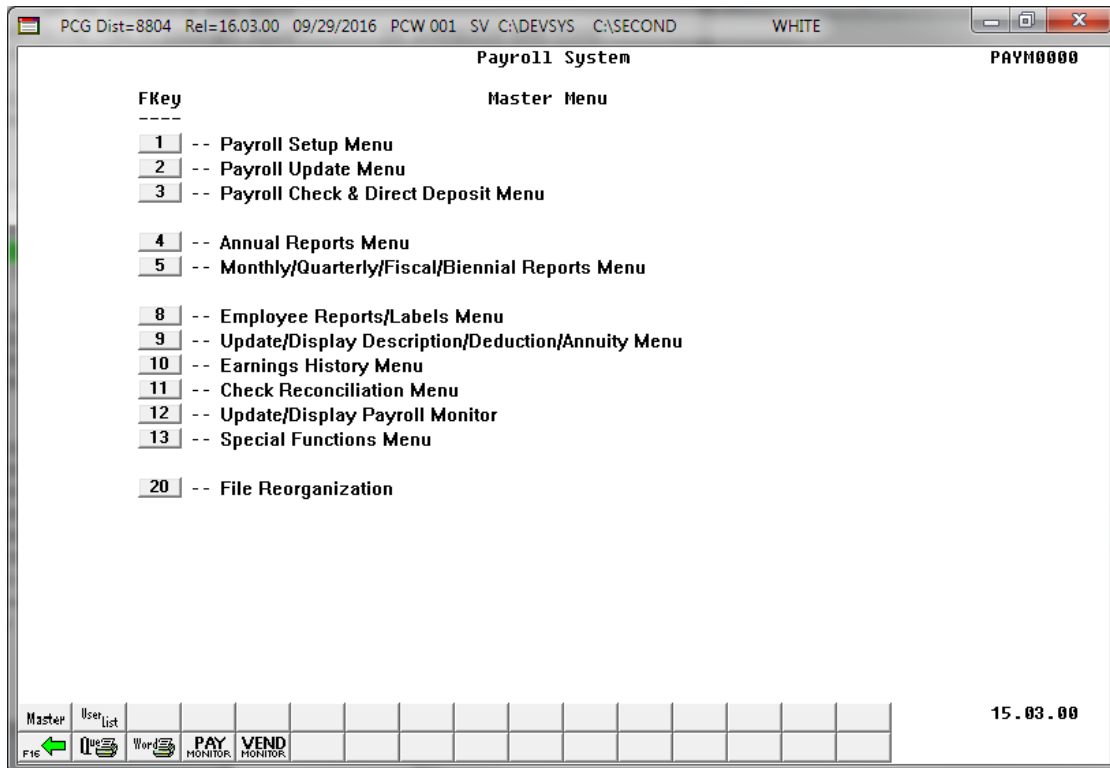
**Performing a Data backup before the beginning of the import of new employee information into PCGenesis is strongly encouraged.**

Step	Action
1	Log out of PCGenesis.
2	<b>Make sure all other users are log out of PCGenesis.</b>
3	Close <i>Uspool</i> at the server.
4	Perform a PCGenesis full backup to CD or DVD or USB.
5	When the PCGenesis backup completes, label the backup media <b>“PCG Data Backup BEFORE New Hire Import - MMDDCCYY”</b> .
6	Maintain the <i>Data</i> backup media and the <i>Backup Log</i> until completing the import, and verifying the results.

## D5.2. Importing the Microsoft® Excel PCG\_New\_One\_Employee.csv File into PCGenesis

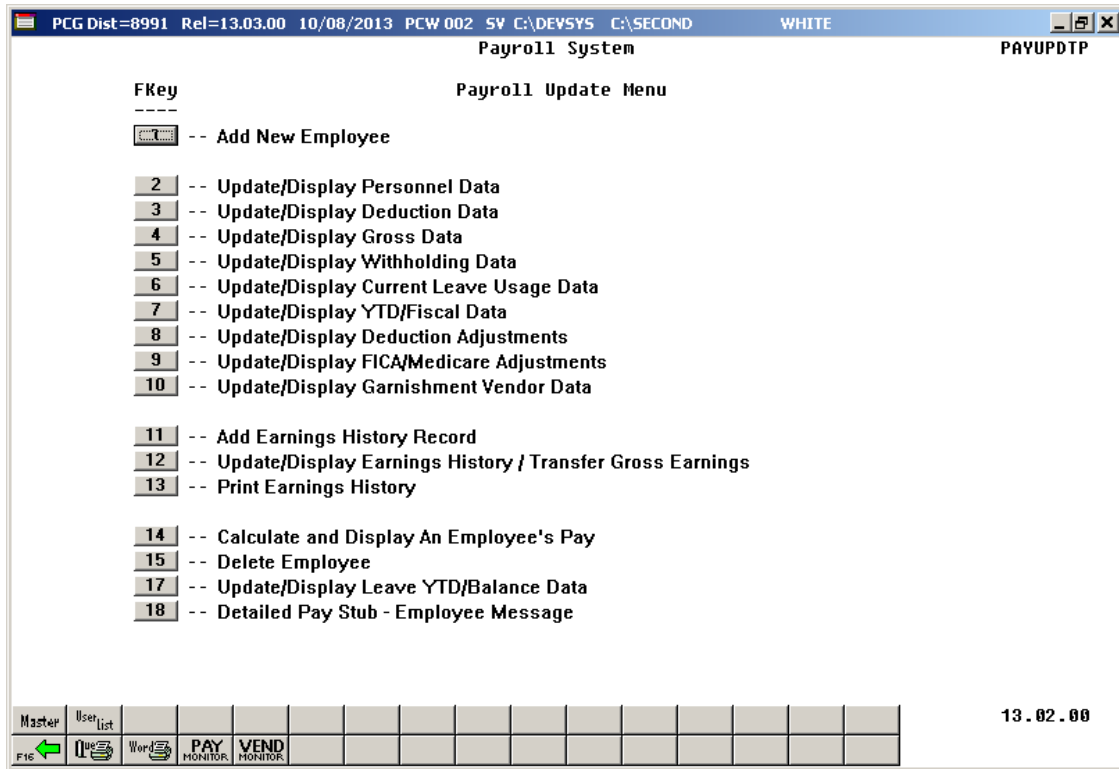
Step	Action
1	From the <i>Business Applications Master Menu</i> , select <b>2</b> (F2 - Payroll System).

The following screen displays:



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

The following screen displays:



Step	Action
3	Select <b>1</b> (F1 - Add New Employee).

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/18/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE - □ ×

**Add New Employee** PAY01

Status **A** -- Active

Emp. no. \_\_\_\_\_ Pay Loc \_\_\_\_\_ Class \_\_\_\_\_  
 Sex Code \_\_\_\_\_ Work Loc \_\_\_\_\_ Job \_\_\_\_\_  
 Mar Stat \_\_\_\_\_ SSN \_\_\_\_\_ EEO-5 Job \_\_\_\_\_  
 Ethnic \_\_\_\_\_

EEO-5 and CPI Ethnic/Race:  
 Hispanic/Latino Ethnicity?

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

Race (Select all that apply)  
 Am Indian Alaskan  
 Black  
 White  
 Asian  
 Hawaiian Pacific

Address \_\_\_\_\_ Certificate Type \_\_\_\_\_  
 Address L2 \_\_\_\_\_ CS1 Job (from CPI) \_\_\_\_\_  
 City/State \_\_\_\_\_ Include on CPI ? \_\_\_\_\_  
 Zip Code \_\_\_\_\_ County \_\_\_\_\_ Sick Bank ? \_\_\_\_\_  
 Phone ( ) - \_\_\_\_\_ Substitute rank \_\_\_\_\_  
 Cell phone ( ) - \_\_\_\_\_ Hours Per Day \_\_\_\_\_


Birth Date \_\_\_\_\_ GHI Eligible ? \_\_\_\_\_ Participate in GHI ? \_\_\_\_\_  
 Hire Date \_\_\_\_\_ GHI BOE Trans? \_\_\_\_\_ GHI Option \_\_\_\_\_  
 Rehire Date \_\_\_\_\_ GHI 1st Day Wrk \_\_\_\_\_ GHI Tier \_\_\_\_\_  
 Background \_\_\_\_\_ GHI Coverage Start \_\_\_\_\_ GHI Ded Cd \_\_\_\_\_  
 Term Date \_\_\_\_\_ GHI Change Code \_\_\_\_\_  
 Term Reason \_\_\_\_\_

GHI Email Pref (W or P)  
 Employee work e-mail:  
 Employee personal e-mail:

**F17=Import new employee data**

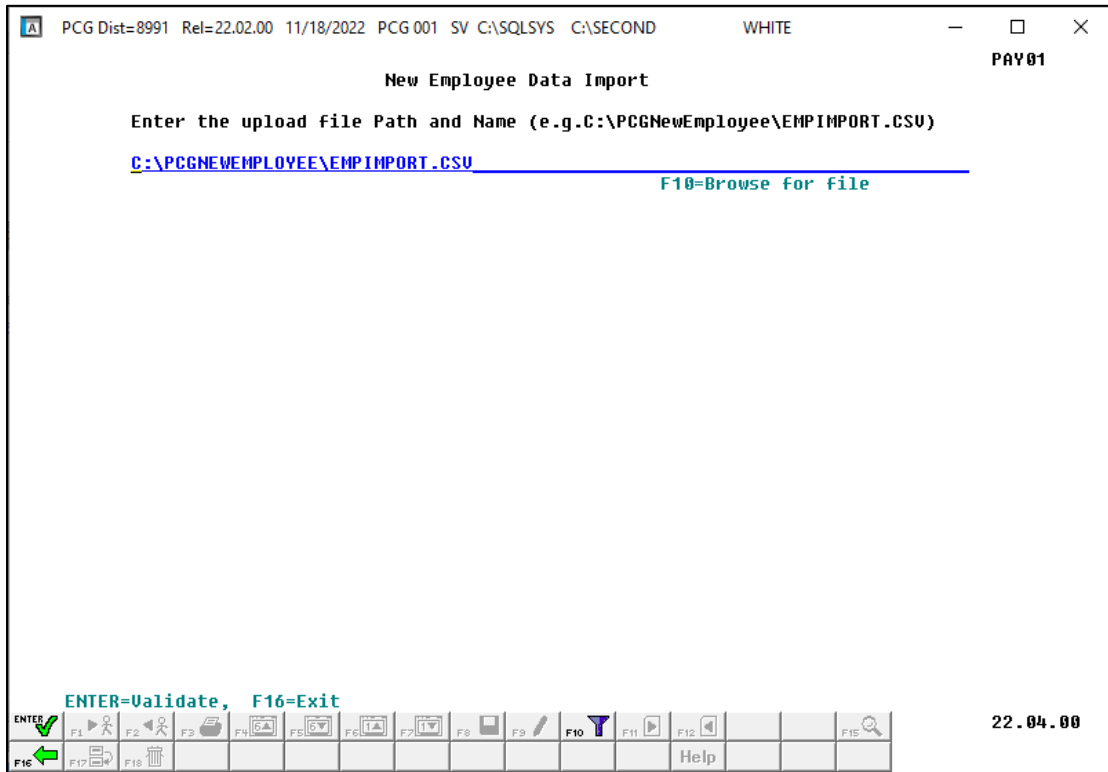
ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F15  
 F16 F17 F18 Help



22.04.00

Step	Action
4	Select  <b>F17</b> (Import new employee data).

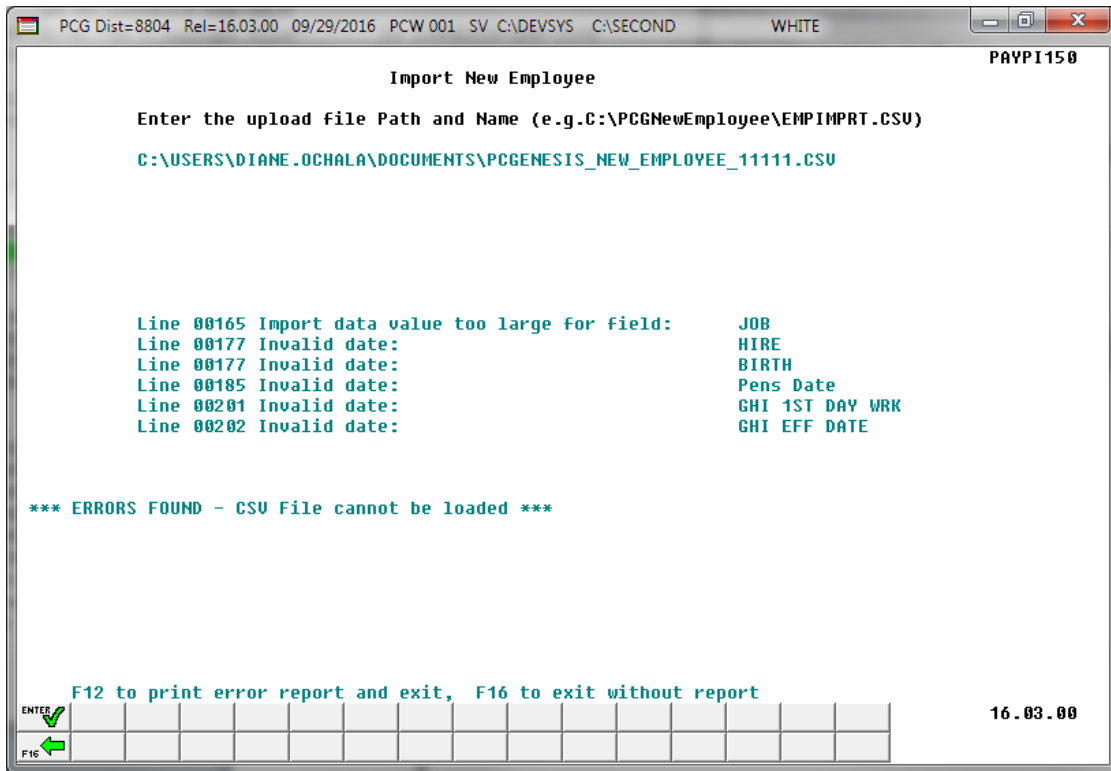



The following screen displays:



Step	Action
5	<p>Enter the file and pathname in the field using the naming convention from <i>D4. Modifying and Saving the PCGenesis PCG_New_One_Employee.csv File in Microsoft® Excel.</i></p> <p>For  (<b>F10 - Browse for file</b>) selections, PCGenesis defaults the Browse window to the .csv file type where appropriate. PCGenesis users may select either the CSV (Comma delimited) (*.csv) or the All Files (*.*) options from the drop down file listing for file type selection. PCGenesis displays a warning message dialog box when an import filename does not contain the .csv file extension.</p>
6	<p>Select  (<b>Enter</b>) twice.</p> <p>“**Scanning Import File**” briefly displays.</p>

For **import file errors**, the following screen displays:

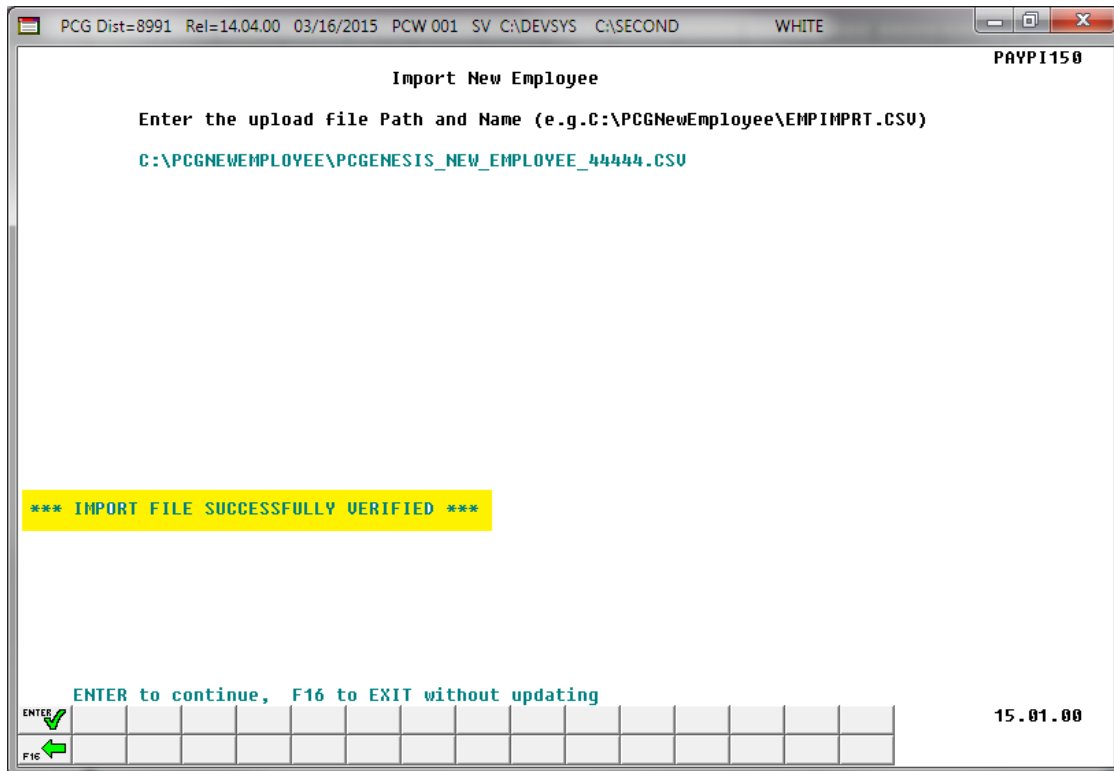



Step	Action
7	<p><b>For import file errors:</b> Select <b>F12</b> (to print error report and exit), or  (<b>F16</b>) to exit without a report. Within the Microsoft® Excel spreadsheet, correct the errors identified, and repeat this procedure beginning at <i>Step 3</i>.</p> <p><i>If the .csv file contains invalid data, the file upload will list up to twelve (12) errors. In order to see additional errors, use <b>F12</b> to print the error report. These errors will include the input file's line number, the error type, and the field in which the error occurred. Compare the error(s) identified to the .csv file's spreadsheet to determine the appropriate corrective measures.</i></p>

**For import file errors:** If errors are detected during the New Hire Import process, the following report can be obtained by selecting **F12** to print the error report and exit. This is an example of the error report.

```
Run date: 09/29/2016                      EMPLOYEE NEW HIRE IMPORT REPORT                      Page: 3
Program: PAYPI150                          Load File Name: C:\USERS\DIANE.OCHALA\DOCUMENTS\PCGENESIS NEW EMPLOYEE 11111.CSV
Import Input Lines and Error Messages
-----
E2, Pay location,1011,,Work location,1011,,Job code,55555,,CS1 Job (from CPI),0
  Line 00165 Import data value too large for field:      JOB
I1, Hire date,13/1/2012,,Birth date,31/1/1961,,Gender,F,,Marital status,S
  Line 00177 Invalid date:                               HIRE
  Line 00177 Invalid date:                               BIRTH
P1, Pension switch,Y,,Pens eligible date,1/32/2012,,,Pension code,6,,Service indicator,1
  Line 00185 Invalid date:                               Pens Date
H1, GHI eligible?,Y,(Y or N),,GHI 1st day worked,31/1/2012,,,Deduction code,8,,
  Line 00201 Invalid date:                               GHI 1ST DAY WRK
H2, Participate?,Y,(Y or N),,Effective date,32/1/2012,,,Option,B6,Tier,10
  Line 00202 Invalid date:                               GHI EFF DATE
```

For **successful file imports**, the following screen displays:



Step	Action
8	<b>For successful file imports:</b> Verify “*** <i>Import File Successfully Loaded</i> ***”, and select  (Enter) to process the file.

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/18/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** PAY01

Status A -- Active

Emp. no. 55599 Pay Loc 106 Location 000106 Class 7 CERTIFIED 10 MONTH

Sex Code E Work Loc 106 Job 107

Mar Stat S SSN 555 99 5555 EEO-5 Job A05 Ethnic 2

NAME First JANE Middle H. EEO-5 and CPI Ethnic/Race: Hispanic/Latino Ethnicity?  Yes  No

Last SMITH Suffix \_\_\_\_\_ Prefix MS. Race (Select all that apply)  Yes  No Am Indian Alaskan  Yes  No Black  Yes  No White  Yes  No Asian  Yes  No Hawaiian Pacific

Address 1 WEST FIRST STREET Certificate Type \_\_\_\_\_

Address L2 APARTMENT 12 CS1 Job (from CPI) 000

City/State ATLANTA, GA Include on CPI ? Y

Zip Code 30000 County 160 Sick Bank ? N

Phone (444)555-6666 Out of State \_\_\_\_\_ Substitute rank 2

Cell phone (404)333-2222 Hours Per Day \_\_\_\_\_

Birth Date 11/01/1961 GHI Eligible ? Y Participate in GHI ? Y

Hire Date 1/01/2012 GHI BOE Trans? Y GHI Option B6 ANTHEM HMO

Rehire Date \_\_\_\_\_ GHI 1st Day Wrk 1/01/2012 GHI Tier 10 SINGLE

Background 1/01/2015 GHI Coverage Start 2/01/2012 GHI Ded Cd 8

Term Date \_\_\_\_\_ GHI Change Code NEMP





Term Reason \_\_\_\_\_

GHI Email Pref (W or P) P

Employee work e-mail: JANE.SMITH@DOE.K12.GA.US

Employee personal e-mail: JSMITH@OUTLOOK.COM

22.04.00

Step	Action
9	<p>Verify the information displayed is correct, make the appropriate entries in the fields, and select  (<b>Enter</b>) to validate the entries.</p> <p><i>When detecting errors during validation, PCGenesis highlights the fields containing errors. In this instance, correct the error(s) indicated and select  (<b>Enter</b>) to validate the employee's information again. After correcting all "normal" errors, PCGenesis checks several other conditions and where appropriate, displays various cautionary warning messages. Acknowledge these messages by selecting  (<b>Enter</b>).</i></p> <p>Select  (<b>F3</b> – Print this data) to obtain a screen print of the <i>Add New Employee</i> screen. The screen print file will be available in the print queue with the name 'PSCNnnnn'.</p>

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/18/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** **PAY01**

Status A -- Active SMITH, JANE H.

Emp. no. 55599 Pay Loc 106 Location 000106 Class 7 CERTIFIED 10 MONTH

Sex Code F Work Loc 106 Location 000106 Job 107 GRADE 7

Mar Stat S SSN 555 99 5555 EEO-5 Job A05 Elem Teacher

Ethnic 2 WHITE

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

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

NAME First JANE Middle H.  
Last SMITH Suffix \_\_\_\_\_ Prefix MS.

Address 1 WEST FIRST STREET Certificate Type \_\_\_\_\_  
Address L2 APARTMENT 12 CS1 Job (from CPI) 000

City/State ATLANTA, GA Include on CPI ? Y

Zip Code 30008 County 160 Sick Bank ? N

Phone (444)555-6666 Out of State \_\_\_\_\_ Substitute rank 2

Cell phone (404)333-2222 Hours Per Day \_\_\_\_\_

Birth Date 11/01/1961 GHI Eligible ? Y Participate in GHI ? Y

Hire Date 1/01/2012 GHI BOE Trans? Y GHI Option B6 ANTHEM HMO

Rehire Date \_\_\_\_\_ GHI 1st Day Wrk 1/01/2012 GHI Tier 10 SINGLE

Background 1/01/2015 GHI Coverage Start 2/01/2012 GHI Ded Cd 8

Term Date \_\_\_\_\_ GHI Change Code NEMP

Term Reason \_\_\_\_\_

GHI Email Pref (W or P) P

Employee work e-mail: JANE.SMITH@DOE.K12.GA.US

Employee personal e-mail: JSMITH@OUTLOOK.COM

Validations passed. Check screen 2 or save your changes.

22.04.00

ENTER

Step	Action
<b>10</b>	<p>For detailed information about entering and saving employee data, refer to <i>Procedure B: Adding a New Payroll Employee</i>.</p> <p>Verify the entries are correct and that “<i>Validations passed. Check screen 2 or save your changes.</i>” displays, and select  (F8 – Save changes).</p>

The following screen displays:

PCG Dist=8991 Rel=22.02.00 11/18/2022 PCG 001 SV C:\SQLSYS C:\SECOND WHITE

**Add New Employee** PAY01

Status **A** -- Active

Emp. no. \_\_\_\_\_ Class \_\_\_\_\_  
 Sex Code \_\_\_\_\_ Work Loc \_\_\_\_\_ Job \_\_\_\_\_  
 Mar Stat \_\_\_\_\_ SSN \_\_\_\_\_ EEO-5 Job \_\_\_\_\_  
 Ethnic \_\_\_\_\_

EEO-5 and CPI Ethnic/Race:  
 Hispanic/Latino Ethnicity?

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

Race (Select all that apply)  
 Am Indian Alaskan  
 Black  
 White  
 Asian  
 Hawaiian Pacific

Address \_\_\_\_\_ Certificate Type \_\_\_\_\_  
 Address L2 \_\_\_\_\_ CS1 Job (from CPI) \_\_\_\_\_  
 City/State \_\_\_\_\_ Include on CPI ? \_\_\_\_\_  
 Zip Code \_\_\_\_\_ County \_\_\_\_\_ Sick Bank ? \_\_\_\_\_  
 Phone ( ) - \_\_\_\_\_ Out of State \_\_\_\_\_ Substitute rank \_\_\_\_\_  
 Cell phone ( ) - \_\_\_\_\_ Hours Per Day \_\_\_\_\_

Birth Date \_\_\_\_\_ GHI Eligible ? \_\_\_\_\_ Participate in GHI ? \_\_\_\_\_  
 Hire Date \_\_\_\_\_ GHI BOE Trans? \_\_\_\_\_ GHI Option ANTHEM HMO  
 Rehire Date \_\_\_\_\_ GHI 1st Day Wrk \_\_\_\_\_ GHI Tier SINGLE  
 Background \_\_\_\_\_ GHI Coverage Start \_\_\_\_\_ GHI Ded Cd \_\_\_\_\_  
 Term Date \_\_\_\_\_ GHI Change Code \_\_\_\_\_  
 Term Reason \_\_\_\_\_

GHI Email Pref (W or P)  
 Employee work e-mail:  
 Employee personal e-mail:


**Employee: 055599 SMITH, JANE H. was saved.**

F17=Import new employee data

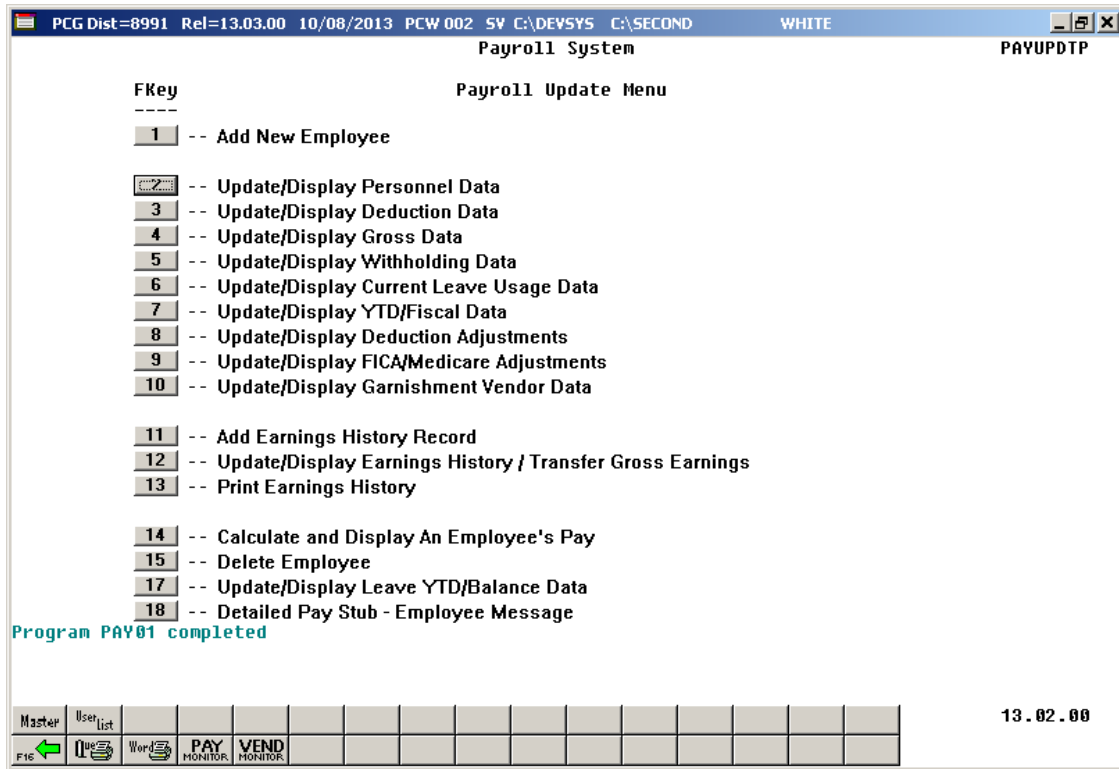
ENTER [F1] [F2] [F3] [F4] [F5] [F6] [F7] [F8] [F9] [F10] [F11] [F12] [F15]



[F16] [F17] [F18] [Help]

22.04.00

Step	Action
<b>11</b>	Verify “Employee: ##### (Employee Name) was saved.” displays, and select  (F16 – Exit) to return to the <i>Payroll System – Payroll Update Menu</i> .

The following screen displays:



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



## Appendix A: Formatting the PCG\_New\_One\_Employee.csv File (Multiple Files, One Employee Per File)

Use the following information for technical reference when needing additional flexibility to create the new employee .csv file or to gain a better understanding of .csv file processing.

PCG_New_One_Employee.csv File Format Requirements	
<b>1</b>	<p>When creating the .csv file, the <i>New Employee Entry/Import</i> procedure only processes lines containing a valid <b>Line Code</b> within <i>Column A</i>.</p> <p>Valid values:</p> <ul style="list-style-type: none"> <li>• E1, E2, E3</li> <li>• N1, N2</li> <li>• A1, A2, A3, A4, A5</li> <li>• I1, I2, I3</li> <li>• P1, P2</li> <li>• T1, T2, T3, T4</li> <li>• S1, S2, S3</li> <li>• H1, H2, H3</li> </ul> <p><u>Note:</u> Leave <i>Column A</i> blank to include <i>Comments</i> and/or <i>Headings</i> in the .csv file.</p>
<b>2</b>	The <b>E1 Header</b> line must meet the following specifications:
<b>2.1</b>	Must contain a <b>E1</b> in <i>Column A</i> .
<b>2.2</b>	<i>Column D</i> must contain up to five (5) digits representing the <b>employee number</b> .
<b>2.3</b>	<i>Column G</i> must contain up to one (1) alphanumeric character representing the <b>employee status</b> .
<b>2.4</b>	<p><i>Column J</i> must contain the employee's <b>social security number</b> in either of the following two formats:</p> <ul style="list-style-type: none"> <li>• Eleven (11) alphanumeric characters representing the employee's social security number in the format ###-##-#### (with dashes).</li> <li>• Nine (9) digits representing the social security number in the format ##### (without dashes).</li> </ul>
<b>2.5</b>	<i>Column N</i> must contain up to two (2) digits representing the <b>employee class code</b> .
<b>3</b>	The <b>E2 Header</b> line must meet the following specifications:
<b>3.1</b>	Must contain a <b>E2</b> in <i>Column A</i> .
<b>3.2</b>	<i>Column D</i> must contain up to four (4) digits representing the <b>pay location code</b> .
<b>3.3</b>	<i>Column G</i> must contain up to four (4) digits representing the <b>work location code</b> .
<b>3.4</b>	<i>Column J</i> must contain up to three (3) digits representing the <b>job code</b> .
<b>3.5</b>	<i>Column N</i> must contain up to three (3) digits representing the <b>CS1 job code (from CPI)</b> .

PCG_New_One_Employee.csv File Format Requirements	
<b>4</b>	The <b>E3 Header</b> line must meet the following specifications:
<b>4.1</b>	Must contain a <b>E3</b> in <i>Column A</i> .
<b>4.2</b>	<i>Column G</i> must contain one (1) alphanumeric character representing the employee's <b>Sick Bank</b> participation.
<b>4.3</b>	<i>Column J</i> must contain up to two (2) digits with three (3) decimal digits representing the <b>hours worked per day</b> . The amount must be positive. For example, the amount may be entered as 12.123
<b>4.4</b>	<i>Column N</i> must contain up to one digit representing the <b>substitute rank code</b> .
<b>5</b>	The <b>NI Name</b> line must meet the following specifications:
<b>5.1</b>	Must contain a <b>NI</b> in <i>Column A</i> .
<b>5.2</b>	<i>Column E</i> must contain up to fifteen (15) alphanumeric characters representing the employee's <b>first name</b> .
<b>5.3</b>	<i>Column H</i> must contain up to fifteen (15) alphanumeric characters representing the employee's <b>middle name or initial</b> .
<b>5.4</b>	<i>Column K</i> must contain up to twenty (20) alphanumeric characters representing the employee's <b>last name</b> .
<b>6</b>	The <b>N2 Name</b> line must meet the following specifications:
<b>6.1</b>	Must contain a <b>N2</b> in <i>Column A</i> .
<b>6.2</b>	<i>Column E</i> must contain up to six (6) alphanumeric characters representing the employee's <b>name prefix</b> .
<b>6.3</b>	<i>Column H</i> must contain up to six (6) alphanumeric characters representing the employee's <b>name suffix</b> .
<b>7</b>	The <b>AI Address</b> line must meet the following specifications:
<b>7.1</b>	Must contain an <b>AI</b> within <i>Column A</i> .
<b>7.2</b>	<i>Column E</i> must contain up to thirty (30) alphanumeric characters representing the employee's <b>address line 1</b> .
<b>8</b>	The <b>A2 Address</b> line must meet the following specifications:
<b>8.1</b>	Must contain an <b>A2</b> within <i>Column A</i> .
<b>8.2</b>	<i>Column E</i> must contain up to thirty (30) alphanumeric characters representing the employee's <b>address line 2</b> .
<b>8.3</b>	<i>Column M</i> must contain up to three (3) digits representing the employee's <b>Georgia county code</b> .
<b>9</b>	The <b>A3 Address</b> line must meet the following specifications:
<b>9.1</b>	Must contain an <b>A3</b> within <i>Column A</i> .
<b>9.2</b>	<i>Column E</i> must contain up to twenty-six (26) alphanumeric characters representing the employee's <b>address city</b> .

PCG_New_One_Employee.csv File Format Requirements	
9.3	<i>Column H</i> must contain up to two (2) alphanumeric characters representing the employee's <b>address state abbreviation code</b> .
9.4	<i>Column I</i> must contain up to ten (10) alphanumeric characters representing the employee's <b>address zip code</b> .
9.5	<i>Column M</i> must contain up to ten (10) digits representing the employee's <b>phone number</b> .
10	The <b>A4 Address</b> line must meet the following specifications:
10.1	Must contain an <b>A4</b> within <i>Column A</i> .
10.2	<i>Column E</i> must contain up to fifty (50) alphanumeric characters representing the employee's <b>work e-mail address</b> . The <b>work e-mail address</b> must contain one '@' sign.
10.3	<i>Column M</i> must contain up to ten (10) digits representing the employee's <b>cell phone number</b> .
11	The <b>A5 Address</b> line must meet the following specifications:
11.1	Must contain an <b>A5</b> within <i>Column A</i> .
11.2	<i>Column E</i> must contain up to fifty (50) alphanumeric characters representing the employee's <b>personal e-mail address</b> . The <b>personal e-mail address</b> must contain one '@' sign.
12	The <b>II Personnel</b> line must meet the following specifications:
12.1	Must contain an <b>II</b> within <i>Column A</i> .
12.2	<i>Column D</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>hire date</b> .
12.3	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>birth date</b> .
12.4	<i>Column K</i> must contain up to one (1) alphanumeric character representing the employee's <b>gender</b> .
12.5	<i>Column N</i> must contain up to one (1) alphanumeric character representing the employee's <b>marital status</b> .
13	The <b>I2 Personnel</b> line must meet the following specifications:
13.1	Must contain an <b>I2</b> within <i>Column A</i> .
13.2	<i>Column D</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>background-check date</b> .
13.3	<i>Column H</i> must contain up to three (3) characters representing the <b>EEO-5 job code</b> .
14	The <b>I3 Personnel</b> line must meet the following specifications:
14.1	Must contain an <b>I3</b> within <i>Column A</i> .
14.2	<i>Column D</i> must contain up to two (2) digits representing the <b>Ethnic code</b> .
14.3	<i>Column F</i> must contain up to one (1) alphanumeric character representing the employee's <b>Hispanic race code</b> . Required for EEO-5 and CPI reporting.

PCG_New_One_Employee.csv File Format Requirements		
14.4		<i>Column H, I, J, K, and L</i> must contain up to one (1) alphanumeric character representing the employee's <b>American Indian, Black, White, Asian, and Hawaiian race codes</b> respectively. Valid values are <b>Y</b> or <b>N</b> . Required for EEO-5 and CPI reporting.
14.5		<i>Column N</i> must contain up to one (1) alphanumeric character representing the employee's <b>Include in CPI? code</b> .
15	The <b>P1 Pension</b> line must meet the following specifications:	
15.1		Must contain an <b>P1</b> within <i>Column A</i> .
15.2		<i>Column D</i> must contain up to one (1) alphanumeric character representing the <b>pension switch</b> .
15.3		<i>Column G</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>pension eligible date</b> .
15.4		<i>Column K</i> must contain up to one (1) digit representing the <b>pension code</b> .
15.5		<i>Column N</i> must contain up to one (1) digit representing the <b>TRS service indicator code</b> .
16	The <b>P2 Pension</b> line must meet the following specifications:	
16.1		Must contain an <b>P2</b> within <i>Column A</i> .
16.2		<i>Column N</i> must contain up to two (2) digits representing the <b>'No pension' code</b> .
17	The <b>T1 FICA Tax</b> line must meet the following specifications:	
17.1		Must contain an <b>T1</b> within <i>Column A</i> .
17.2		<i>Column C</i> must contain up to one (1) alphanumeric character representing the <b>FICA switch</b> .
18	The <b>T2 Federal Tax</b> line must meet the following specifications:	
18.1		Must contain an <b>T2</b> within <i>Column A</i> .
18.2		<i>Column C</i> must contain up to one (1) alphanumeric character representing the <b>Federal switch</b> .
18.3		<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's <b>Federal marital filing status</b> .
18.4		<i>Column E</i> must contain up to one (1) digit representing the <b>Federal withholding code</b> .
18.5		<i>Column F</i> must contain up to six (6) digits with two (2) decimal digits representing the <b>Federal additional withholding amount/percent</b> . The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as -123456.12
18.6		<i>Column K</i> must contain up to two (2) digits representing the <b>number of Federal exemptions</b> . <i>This field is valid for a W-4 filed prior to 2020.</i>

PCG_New_One_Employee.csv File Format Requirements	
18.7	<p><i>Column N</i> must contain the appropriate response in the <b>2020 W-4?</b> field.</p> <p>Valid Values:            <b>Y</b> = Employee's W-4 form is from 2020 or later                                       <b>N</b> = Employee's W-4 form is from prior to 2020</p>
19	The <b>T3 State Tax</b> line must meet the following specifications:
19.1	Must contain an <b>T3</b> within <i>Column A</i> .
19.2	<i>Column C</i> must contain up to one (1) alphanumeric character representing the <b>State switch</b> .
19.3	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's <b>State marital filing status</b> .
19.4	<i>Column E</i> must contain up to one (1) digit representing the <b>State withholding code</b> .
19.5	<p><i>Column F</i> must contain up to six (6) digits with two (2) decimal digits representing the <b>State additional withholding amount/percent</b>. The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as</p> <p style="text-align: center;">-123456.12</p>
19.6	<i>Column K</i> must contain up to two (2) digits representing the <b>number of State marital allowances</b> .
19.7	<i>Column N</i> must contain up to two (2) digits representing the <b>number of State dependent allowances</b> .
20	The <b>T4 Federal 2020 W-4</b> line must meet the following specifications:
20.1	Must contain an <b>T4</b> within <i>Column A</i> .
20.2	<p><b>Federal 2020 W-4: Two jobs flag</b> in <i>Column E</i>. If the <b>2020 W-4?</b> field value is 'Y', enter 'Y' if the employee has checked the <i>Step 2</i> checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household.</p> <p>Valid Values:            <b>Y</b> = <i>Step 2</i> checkbox is checked on the 2020 W-4                                       <b>N</b> = <i>Step 2</i> checkbox is <u>not</u> checked on the 2020 W-4</p> <p><i>This field is valid for a W-4 filed in year 2020 or later.</i></p>
20.3	<p><b>Federal 2020 W-4: Depend amount</b> (dependent amount) in <i>Column H</i>. If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 3</i> of the 2020 W-4 form as the amount claimed for dependents.</p> <p><i>This field is valid for a W-4 filed in year 2020 or later.</i></p>
20.4	<p><b>Federal 2020 W-4: Other income</b> in <i>Column K</i>. If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4a</i> of the 2020 W-4 form as the amount claimed for other income.</p> <p><i>This field is valid for a W-4 filed in year 2020 or later.</i></p>

PCG_New_One_Employee.csv File Format Requirements	
20.5	<p><b>Federal 2020 W-4: Deduct amount</b> (deduction amount) in <i>Column N</i>. If the <b>2020 W-4?</b> field value is 'Y', enter the amount from <i>Step 4b</i> of the 2020 W-4 form as the amount claimed for deductions.</p> <p><i>This field is valid for a W-4 filed in year 2020 or later.</i></p>
21	The <b>S1 Salary</b> line must meet the following specifications:
21.1	Must contain an <b>S1</b> within <i>Column A</i> .
21.2	<i>Column D</i> must contain up to six (8) digits with two (2) decimal digits representing the <b>State salary</b> . For example, the amount may be entered as 12345678.12
21.3	<i>Column H</i> must contain up to six (8) digits with two (2) decimal digits representing the <b>cycle gross</b> . For example, the amount may be entered as 12345678.12
21.4	<i>Column L</i> must contain up to one (1) digit representing the <b>cycle code</b> .
22	The <b>S2 Salary</b> line must meet the following specifications:
22.1	Must contain an <b>S2</b> within <i>Column A</i> .
22.2	<i>Column D</i> must contain up to six (8) digits with two (2) decimal digits representing the <b>local salary</b> . For example, the amount may be entered as 12345678.12
22.3	<i>Column H</i> must contain up to six (8) digits with two (2) decimal digits representing the <b>contract amount</b> . For example, the amount may be entered as 12345678.12
23	The <b>S3 Salary</b> line must meet the following specifications:
23.1	Must contain an <b>S3</b> within <i>Column A</i> .
23.2	<i>Column D</i> must contain up to six (8) digits with two (2) decimal digits representing the <b>other salary</b> . For example, the amount may be entered as 12345678.12
23.3	<i>Column H</i> must contain up to two (2) digits representing the <b>number of contract months</b> .
23.4	<i>Column L</i> must contain up to two (2) digits representing the <b>number of contract months for the prior year</b> .
24	The <b>H1 State Health</b> line must meet the following specifications:
24.1	Must contain an <b>H1</b> within <i>Column A</i> .
24.2	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's <b>GHI eligible status</b> .
24.3	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>GHI 1<sup>st</sup> Day Worked</b> .
24.4	<i>Column L</i> must contain up to two (2) digits representing the <b>GHI deduction code</b> .

PCG_New_One_Employee.csv File Format Requirements	
<b>25</b>	The <b>H2 State Health</b> line must meet the following specifications:
<b>25.1</b>	Must contain an <b>H2</b> within <i>Column A</i> .
<b>25.2</b>	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's <b>GHI participation switch</b> .
<b>25.3</b>	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's <b>GHI coverage start date</b> .
<b>25.4</b>	<i>Column L</i> must contain up to two (2) digits representing the <b>GHI option code</b> .
<b>25.5</b>	<i>Column N</i> must contain up to two (2) digits representing the <b>GHI tier code</b> .
<b>26</b>	The <b>H3 State Health</b> line must meet the following specifications:
<b>26.1</b>	Must contain an <b>H3</b> within <i>Column A</i> .
<b>26.2</b>	<i>Column D</i> must contain up to three (3) digits with two (2) decimal digits representing the <b>hours worked per week</b> . The amount must be positive. For example, the amount may be entered as 123.12
<b>26.3</b>	<i>Column H</i> must contain one (1) alphanumeric character representing the employee's <b>GHI E-mail Preference</b> . Valid values are 'P' to send the personal e-mail address to SHBP and 'W' to send the work e-mail address to SHBP.
<b>26.4</b>	<i>Column L</i> must contain up to one (1) alphanumeric character representing the employee's <b>GHI BOE Trans?</b> value. The <b>GHI BOE Transfer</b> field indicates whether or not the employee transferred from another school district. Valid values for the field are Yes (Y), No (N) and "Don't know" (D).

# Appendix B: PCGenesis Automatic Record Creation

## B1. Payroll System Deduction Screen – Examples

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

Status Active Update/Display Deduction Data Screen 1 of 2 PAY06

Employee 78781 SMITH, JANE H. Class 01 Loc 0101 GHI deduction code 08  
 SSN 777-56-7781 Work-Loc 0101

Cd Description	Amount	Emplr	Cd Description	Amount	Emplr (Y/N)
00 FRINGE			01 EMPLOYEE ANNUITY		
02 EMPLOYEE 2ND ANNUITY			03 FED W/H TAX		
04 GA INCOME TAX			08 ANTH HMO SINGLE -CLAS	135.65	N
09 ANTH HMO SINGLE -CERT			10 VENDOR 002488		
11 VENDOR 000999			12 I-UNDR 000005		
13 I-UNDR 000006			14 I-UNDR 004603		
15 VENDOR 004373			16 VENDOR 000012		
17 VENDOR 000016			18 COURT W/H		
19 COURT W/H			20 COURT W/H		
21 COURT W/H			22 VENDOR 000005		
23 CUNION 001001			24 VENDOR 003960		
25 VENDOR 003702			26 COURT W/H		
27 I-UNDR 003702			28 COURT W/H		
29 COURT W/H			30 COURT W/H		
31 VENDOR 000110			32 COURT W/H		
33 VENDOR 004085			34 VENDOR 001975		
35 VENDOR 004894			36 VENDOR 006312		
37 COURT W/H			38 COURT W/H		

Credit Union 00000000000000 Section 125 Y  
 Ann Type Employee Contribution

Ded Desc Ded Annuity Company  
 EMP ANNUITY / 01  
 EMP ANNUITY / 02

17.01.00

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

Status Active Update/Display Deduction Data Screen 2 of 2 PAY06

Employee 78781 SMITH, JANE H. Class 01 Loc 0101 GHI deduction code 08  
 SSN 777-56-7781 Work-Loc 0101

Cd Description	Amount	Emplr	Cd Description	Amount	Emplr (Y/N)
39 COURT W/H			40 VENDOR 003909		
41 COURT W/H			42 BOARD MEMBER MERIT		
43 COURT W/H			44 I-UNDR 005945		
45 I-UNDR 005945			46 I-UNDR 005945		
47 I-UNDR 005946			48 I-UNDR 005947		
49 VENDOR 005948			50 VENDOR 005949		
51 VENDOR 005949			52 VENDOR 005949		
53 VENDOR 005949			54 I-UNDR 000110		
55 I-UNDR 000110			56 I-UNDR 005950		
57 VENDOR 005951			58 VENDOR 005856		
59 COURT W/H			60 VENDOR 005995		
61 VENDOR 004726			62 VENDOR 006076		
63 I-UNDR 006077			64 VENDOR 006119		
65 COURT W/H			66 VENDOR 004373		
67 VENDOR 004373			68 VENDOR 004373		
69 VENDOR 004373			70 COURT W/H		

Credit Union 00000000000000 Section 125 Y  
 Ann Type Employee Contribution

Ded Desc Ded Annuity Company  
 EMP ANNUITY / 01  
 EMP ANNUITY / 02

17.01.00



## B2. Certified/Classified Personnel Information (CPI) Screens – Examples

### B2.1. Certificate File - Biographical Screen – Example

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE		CPICM100																																																								
<b>DISPLAY/UPDATE INDIVIDUAL EMPLOYEE INFORMATION</b>																																																										
<b>CERTIFICATE FILE - BIOGRAPHICAL INFORMATION</b>																																																										
Employee number:	78781 SMITH, JANE H.	SSN: 777 56 7781 STRIDE ID: 0																																																								
Work location:	101 Location 000101	Birth: 11/01/1961																																																								
Sex:	F																																																									
Ethnic:	02																																																									
National cert:	N (Y or N)																																																									
Advance/Inhibit:	(A, E or spaces)																																																									
Certificate level:		Cert. pay step:																																																								
Cert. years exp:		Local years exp:																																																								
Total employment basis:	1.00																																																									
Emp. basis-cert.:	1.00	Emp. basis-class: 0.00																																																								
Annual contract sal:	\$ 30,000.00	Annual classified sal: \$ .00																																																								
State minimum salary:	\$ .00																																																									
Annual contract days:		Annual work days:																																																								
Termination date:		Rehire date:																																																								
Termination reason:																																																										
Long term sub?:	N (Y or N)																																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>ENTER</td> <td>F1</td> <td>F2</td> <td>F3</td> <td>F4</td> <td>F5</td> <td>F6</td> <td>F7</td> <td>F8</td> <td>F9</td> <td>F10</td> <td>F11</td> <td>F12</td> <td>F15</td> </tr> <tr> <td>F16</td> <td>F17</td> <td>F18</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Help</td> <td>Bio</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Cert</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Asg</td> </tr> </table>		ENTER	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12	F15	F16	F17	F18										Help	Bio														Cert														Asg	19.03.00
ENTER	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12	F15																																													
F16	F17	F18										Help	Bio																																													
													Cert																																													
													Asg																																													

## B2.2. Certificate File Maintenance Screen – Example

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE CPICM100

**CERTIFICATE  
FILE MAINTENANCE**

Employee Number: 78781 SMITH, JANE H. SSN: 777-56-7781  
STRIDE ID: 0

Cert Level: 0 Eff Date: Cert ID: Open case?: N

Field Code	Cert Type	Prof/Renew Flag	Valid From	Valid To
CERT 001				
CERT 002				
CERT 003				
CERT 004				
CERT 005				
CERT 006				

19.03.00

ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15 F16 F17 F18 F19 F20 F21 F22 F23 F24 F25 F26 F27 F28 F29 F30 F31 F32 F33 F34 F35 F36 F37 F38 F39 F40 F41 F42 F43 F44 F45 F46 F47 F48 F49 F50 F51 F52 F53 F54 F55 F56 F57 F58 F59 F60 F61 F62 F63 F64 F65 F66 F67 F68 F69 F70 F71 F72 F73 F74 F75 F76 F77 F78 F79 F80 F81 F82 F83 F84 F85 F86 F87 F88 F89 F90 F91 F92 F93 F94 F95 F96 F97 F98 F99 F100

Help Bio Cert Asg

## B2.3. Certificate File – Assignment Screen – Example

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE CPICM100

**DISPLAY/UPDATE INDIVIDUAL EMPLOYEE INFORMATION  
CERTIFICATE FILE - ASSIGNMENT SUMMARY**

SSN: 777-56-7781 EMPLOYEE #: 078781 NAME: SMITH, JANE H.  
STRIDE ID: 0

Certificate Level: 0

===== ASSIGNMENT SUMMARY =====

PFKEY	C/N	LOC	JOB	SUBJ	FIELD	TYPE	FUND	CONSO	PERCENT
Asgn 01	F11								
Asgn 02	F12								
Asgn 03	F13								
Asgn 04	F14								
Asgn 05	F17								
Asgn 06	F18								
Asgn 07	F19								
Asgn 08	F20								
Asgn 09	F21								
Asgn 10	F22								
Asgn 11	F23								
Asgn 12	F24								
Asgn 13	F25								
Asgn 14	F26								
Asgn 15	F27								

.0

**WARNING! - Percents on Assignments Do Not Equal 100%**

19.03.00

ENTER F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15 F16 F17 F18 F19 F20 F21 F22 F23 F24 F25 F26 F27 F28 F29 F30 F31 F32 F33 F34 F35 F36 F37 F38 F39 F40 F41 F42 F43 F44 F45 F46 F47 F48 F49 F50 F51 F52 F53 F54 F55 F56 F57 F58 F59 F60 F61 F62 F63 F64 F65 F66 F67 F68 F69 F70 F71 F72 F73 F74 F75 F76 F77 F78 F79 F80 F81 F82 F83 F84 F85 F86 F87 F88 F89 F90 F91 F92 F93 F94 F95 F96 F97 F98 F99 F100

Help Bio Cert Asg