PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

11/22/2022	Section I: Special Functions

[Topic 8C: Payroll Selected Data Export and Import File Processing, V1.14]

Revision History

Date	Version	Description	Author
11/22/2022	1.14	22.04.00 – Add **Personal E-Mail** and **GHI Email Pref** to *Employee E-mail Export/Import* and *Contact Data Export/Import*.	D. Ochala
01/10/2020	1.13	19.04.00 – Update export/import instructions for employee name fields, CPI Stride ID, and Federal withholding and state withholding information.	D. Ochala
03/20/2019	1.12	19.01.00 – Update export/import instructions for CPI data. Add **Certified Years Experience** and **Local Years Experience**.	D. Ochala
10/01/2018	1.11	18.03.00 – Update export/import instructions for CPI assignment data. **Infield Status** field is no longer used.	D. Ochala
03/30/2018	1.10	18.01.00 – Add a new option to the export/import instructions for CPI assignment data.	D. Ochala
09/20/2017	1.9	17.03.00 – Update export/import instructions for CPI assignment data. Add **Consolidated Fund Flag**.	D. Ochala
07/19/2017	1.8	17.02.00 – Update export/import instructions for CPI assignment data.	D. Ochala
04/03/2017	1.7	17.01.00 – Update export instructions for the **TRS Service Lock** field.	D. Ochala
07/17/2015	1.6	15.02.00 – Update export instructions for the **No Pension Indicator** field.	D. Ochala
02/05/2015	1.5	14.04.00 – Update export instructions for the Contact Data, Enable DDP Switch, Budget Pay Category, Annual Work Days, and Pension Eligible Date.	D. Ochala
07/25/2013	1.4	13.02.00 – Update export instructions for the Sick Bank Indicator, State Marital Allowances, and Emergency Contact fields.	D. Ochala
03/27/2013	1.3	13.01.00 – Update export instructions for the Leave Reason Max, Background-Check Date, Cell Phone Number, and E-mail Address fields.	D. Ochala
11/12/2012	1.2	12.03.00 – Update export instructions for the Hours Per Day, Prior Year Contract Months, Substitute Rank, Override Accrue Flag, and the Adjusted Leave Eligible Date fields. Update screenshots with white screens.	D. Ochala
05/24/2011	1.1	11.02.00 – Update export instructions to include CPI assignment data. Update the import instructions to include the EEO-5 Job Code and the Scheduled Hours per Week fields. Update menu screenshots.	D. Ochala
12/08/2010	1.0	10.04.00 – Create a new document for *Payroll Selected Data Export and Import File Processing* instructions.	D. Ochala

Table of Contents

Overview

Export Selected Payroll / Deduction / CPI Information: PCGenesis allows users to select payroll, personnel, certified/classified personnel information (CPI), and up to twenty (20) deduction items for inclusion in the export file. If payroll deductions are selected, the export file may contain multiple lines per employee, one line for each payroll deduction selected. Further, users may specify dollar amount, Social Security Number (SSN), and date formats for the results output.

Import Selected Payroll Information: This feature provides the ability to mass update certain employee data by importing the new amounts/values from *.csv* import file. Create this import file either via a spreadsheet or by selecting the **Export File Type** option as '**I**' ('Create File to Modify and Import') on the *Export Selected Payroll / Deduction / CPI Information* screen.

The following employee data fields may be imported using the **Import Selected Payroll or CPI Information** option:

- First, Middle, Last Name
- Ethnic Data
- EEO-5 Job Code
- Hours Per Week
- Hours Per Day
- Substitute Rank
- Leave Reason Maximum
- Background-Check Date
- Cell Phone Number
- E-mail addresses
- Sick Bank Indicator

- 'No Pension' Code
- Emergency Contact Fields
- Budget Pay Category
- Contact Data
- Annual Work Days
- Pension Eligible Date
- Certified Years Experience
- Local Years Experience
- CPI Assignment Data
- CPI Stride ID

GHI Change Code/GHI Change Date Fields: The GHI change code and change date fields track employee updates which impact GHI processing. When selecting **E-mail Address,** or **Hours Per Week**, or **Contact Information**, or **Employee Name** for import, PCGenesis <u>automatically</u> creates a GHI change record when the corresponding employee fields change.

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.

Setting Employee Search Criteria: Refer to *Section B: Payroll Update Processing, Topic 1: Setting/Clearing Employee Search Criteria* for the instructions on setting search criteria filters to select specific employees for the export file. The search filters allow the user great flexibility in determining which employees are selected for the export. For example, employee records may be selected based upon the class code, number of contract months, work location, and more.

The following export procedures allow utilization of the Search Criteria feature (F10 🔽 *F10 – Set filter condition)*: *Export Selected Payroll/Deduction/CPI Information, Earnings History Export*, and *Earnings History Gross Pay Distribution Export*.

Procedure A: Exporting Selected Payroll / Deduction / CPI Information
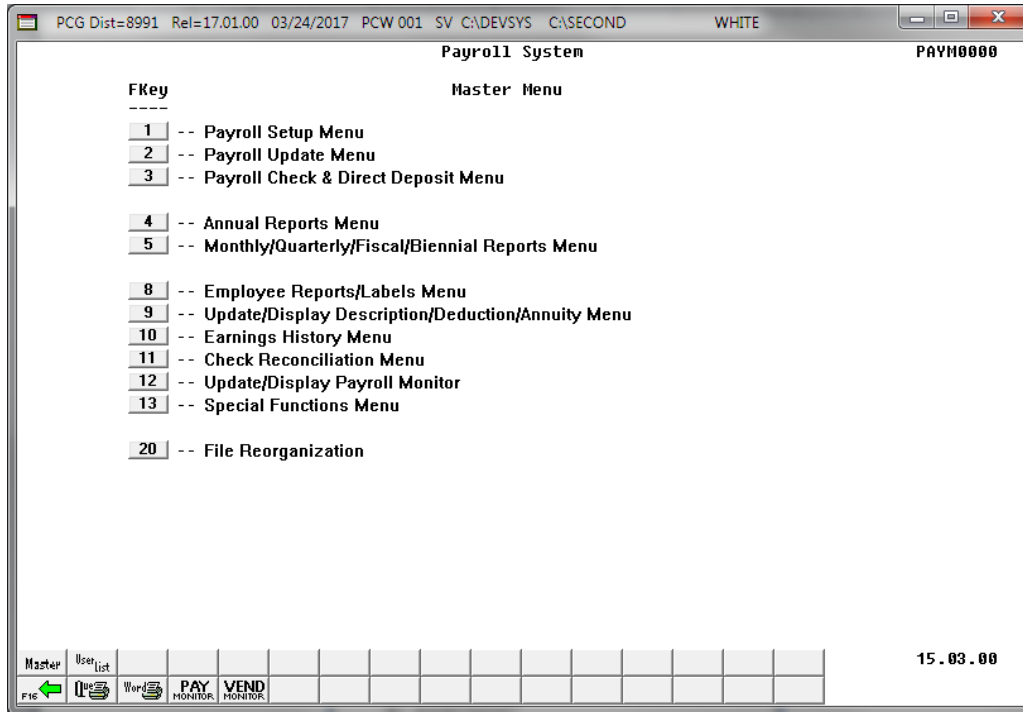
Step	Action
1	Select ⬚ 13 ⬚ (**F13 -** Special Functions).
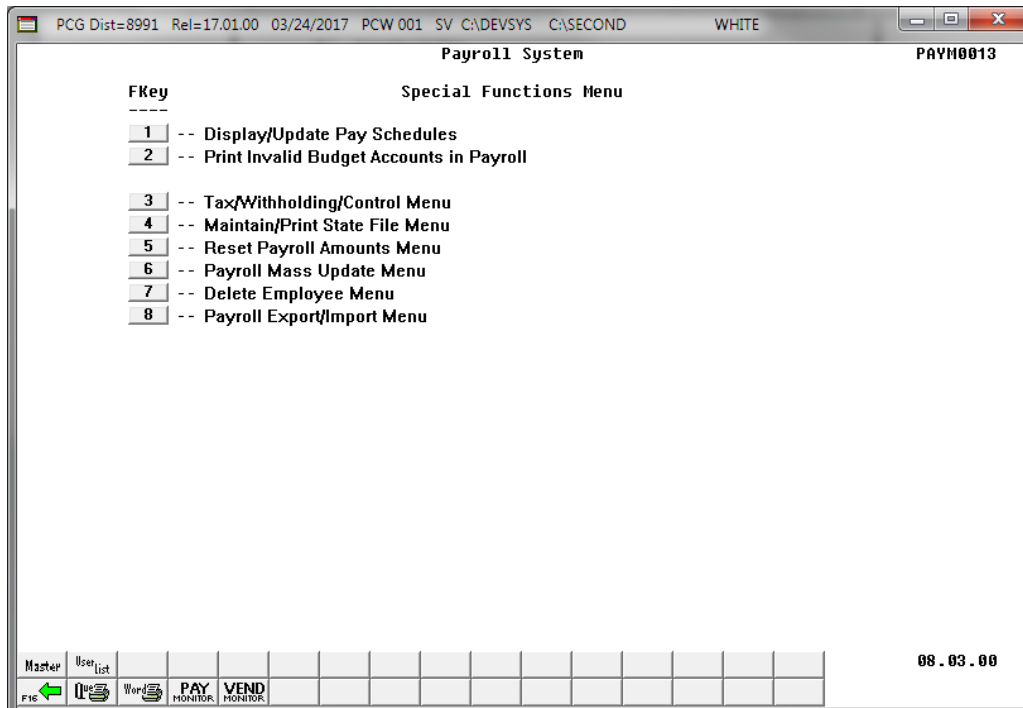
The following screen displays:

Step	Action
2	Select ⬜**8** (**F8** - Payroll Export/Import Menu).

The following screen displays:
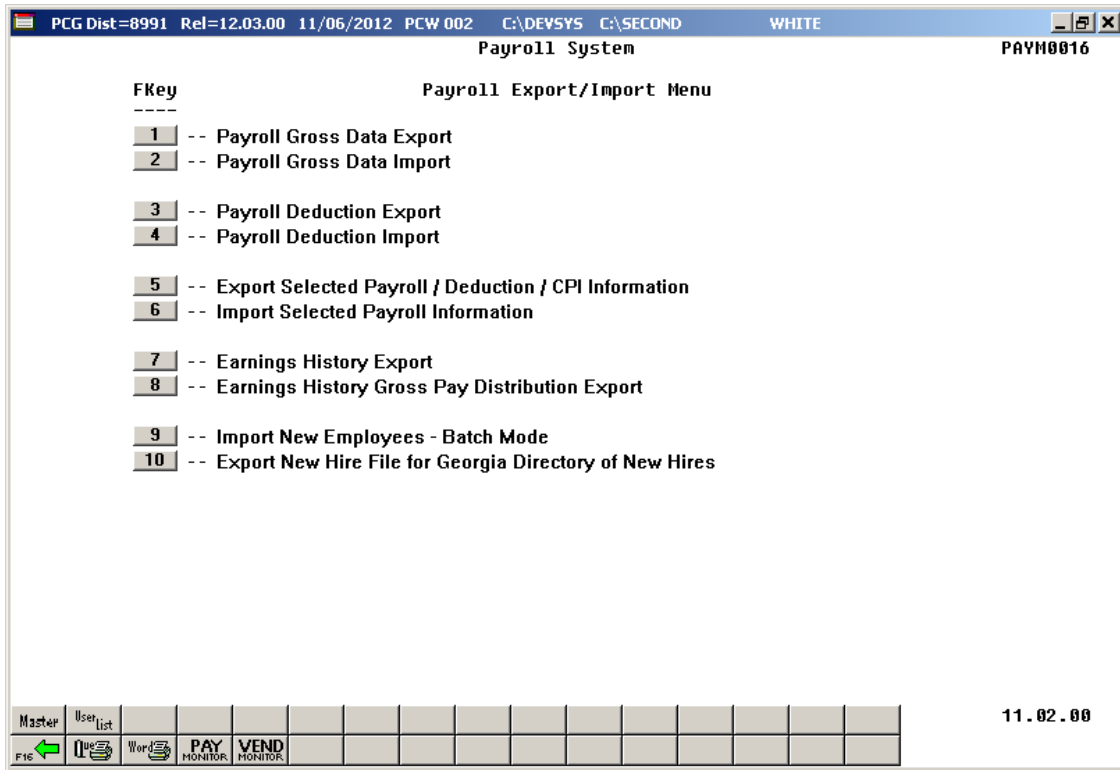
Step	Action
3	Select ⬜**5** (**F5** – Export Selected Payroll/Deduction/CPI Information).
4	On the **C:** drive, create a folder entitled **EXPORT**, or verify the folder exists.

The following screen displays:

Step	Action
5	Verify **C:\EXPORT\PAYEXPCCYYMMDD.CSV**, where *CCYYMMDD* identifies the calendar year, month and date, defaults in the **Enter the Export file path and name** field.
	PCGenesis allows entries other than C:\EXPORT\PAYEXPCCYYMMDD.CSV as long as the directory structure entered exists.
	In the case of duplicated filenames, PCGenesis replaces the previous file's information with the most recently selected deduction and payroll information results.
6	Select ![ENTER] (**Enter**) to continue.

The following screen displays:
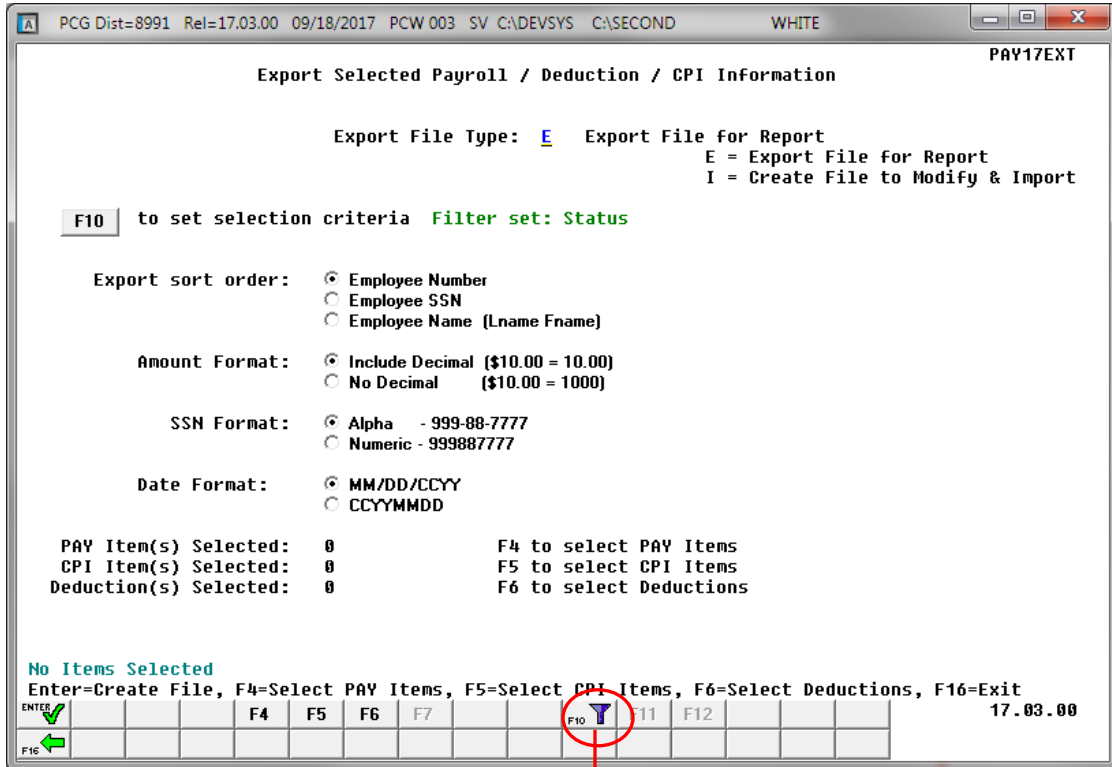
F10 – Set filter conditions

Step	Action
7	**To set specific search criteria:** Select ⬛🔽 (**F10** – Set filter condition). On the *Export Employee Master Data – Set Employee Selection Filter* screen, make the appropriate selections and entries. Verify *"Filter conditions set."* displays. Selecting ⬛⬅ (**F16** – Exit) will return to the *Payroll Export/Import Menu*. *NOTE*: Do NOT select ⬛✅ (**Enter** – Continue) *at this point. Select employee payroll items* (**F4** – Select Pay Items), *CPI items* (**F5** - Select CPI items), *and/or deductions* (**F6** – Select Deductions) *first, before processing the export request.*

Step	Action
8	**Export file type:** Select '**E**' if the data in the file will be used outside of PCGenesis. For example, select '**E**' to create a 'census file' for a third-party vendor. Select '**I**' if the data in the export file will be imported back into PCGenesis. For example, select '**I**' to create a file that will be used to update the employee e-mail addresses in the employee PAYROLL record. *If the* **Export File Type** *is '***I***', the only employee fields supported for the import function are:* • First, Middle, Last Name • Ethnic Data • EEO-5 Job Codes • Hours Per Week • Hours Per Day • Leave Reason Maximum • Background-Check Date • Cell Phone Number • Employee E-mail Address • Sick Bank Indicator • 'No Pension' Code • Substitute Rank • Emergency Contact Data • Budget Pay Category • Contact Data • Annual Work Days • Pension Eligible Date • Certified Years Experience • Local Years Experience • CPI Stride ID • CPI Assignment Data *The bulleted items listed above are the only fields that can be* <u>imported</u> *back into PCGenesis.*
9	Select ⬜**4** (**F4 – Select Pay Items**), if payroll items are to be exported.

The following screen displays when '**I**' is entered for the **Export file type** in *Step 8*:

```
 A   PCG Dist=8991  Rel=19.04.00  01/10/2020  PCG 001  SV  C:\DEVSYS  C:\SECOND        WHITE           —    □    ×
                                                                                                    PAY17EXT
                        Export Selected Payroll / Deduction / CPI Information

                             Select Payroll/Personnel Fields


        Enter 'X' for the item to be reported                         Select only one item

             LAST NAME _           PAY LOC              CONTMO               BIRTH DATE
            FIRST NAME _          WORK LOC   ANNUAL WORK DAYS _              HIRE DATE
           MIDDLE NAME _         SECTION 125      CONTRACT GROSS             REHIRE DATE
           NAME SUFFIX             CLASS      CONTRACT BIWEEKLY            DATE OF DEATH
                STREET           JOBCLASS        STATE ANNUAL                TERM DATE
               STREET2            CPI JOB        LOCAL ANNUAL              TERM REASON
                  CITY           CERT TYPE       OTHER ANNUAL      PENSION ELIG DATE _
                 STATE       PAY SCHEDULE #            FICA SW                 GHI IND
                   ZIP          PAY CYCLE    FEDERAL W/H INFO    DOE PAID ERCON FLAG
             TELEPHONE       PENSION CODE      STATE W/H INFO            CPI INCLUDE
         PAYROLL STATUS         RETIRE SW     GHI INFORMATION          ENABLE DDP SW
                   SEX     TRS SERVICE IND
             ETHNIC _     TRS SERVICE LOCK
               MARITAL   'NO PENSION' CODE _
         EEO-5 JOB CODE _       SPOUSE SSN
        HOURS PER WEEK _   PRIOR YEAR CONTMO
         HOURS PER DAY _   SUBSTITUTE RANK _
       LEAVE REASON MAX _   OVERRIDE ACCRUE
     BACKGROUND CHK DATE _  ADJ LEAVE ELIG DATE
            CELL PHONE _     EMERGENCY DATA _
        EMPLOYEE E-MAIL _  BUDGET PAY CATEGORY _
     SICK BANK INDICATOR _      CONTACT DATA _


     F7-Return, F16=Exit
    ENTER✓      F4   F5   F6   F7          F10▼ F11  F12                            19.03.01
    F16⬅
```
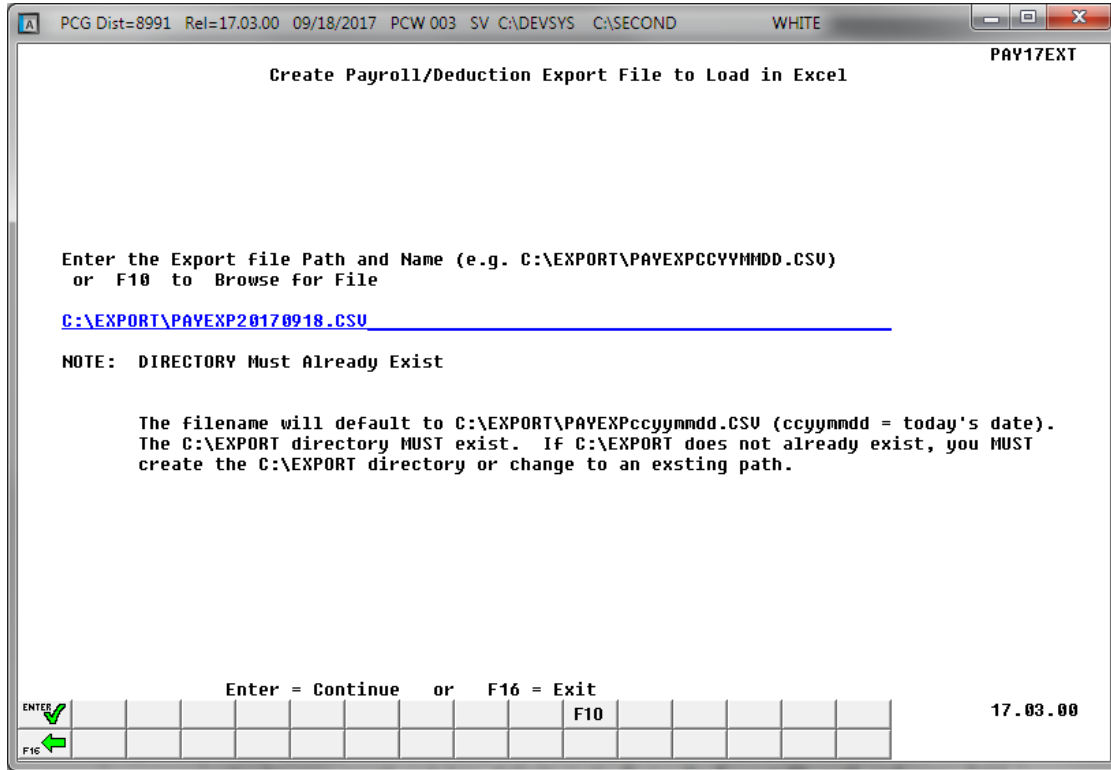
Currently, the only employee fields supported for the import function (**Export file type** = '**I**') are:

- First, Middle, Last Name
- Ethnic Data
- EEO-5 Job Codes
- Hours Per Week
- Hours Per Day
- Leave Reason Maximum
- Background-Check Date
- Cell Phone Number
- Employee E-mail Address
- Sick Bank Indicator
- 'No Pension' Code

- Substitute Rank
- Emergency Contact Data
- Budget Pay Category
- Contact Data
- Annual Work Days
- Pension Eligible Date
- Certified Years Experience
- Local Years Experience
- CPI Assignment Data
- CPI Stride ID

Only one category may be selected at a time. However, to import employee name data, the modifiable fields for last name, first name, and middle name must all be selected.

The following screen displays when '**E**' is entered for the **Export file type** in *Step 8*:

```
  A   PCG Dist=8991  Rel=19.04.00  01/10/2020  PCG 001  SV  C:\DEVSYS  C:\SECOND        WHITE         —    □    ×
                                                                                                    PAY17EXT
                          Export Selected Payroll / Deduction / CPI Information

                                    Select Payroll/Personnel Fields

            Enter 'X' for the item to be reported              F11=Select All, F12=Deselect All

              LAST NAME _           PAY LOC _                CONTMO _            BIRTH DATE _
             FIRST NAME _          WORK LOC _       ANNUAL WORK DAYS _             HIRE DATE _
            MIDDLE NAME _        SECTION 125 _        CONTRACT GROSS _           REHIRE DATE _
            NAME SUFFIX _              CLASS _      CONTRACT BIWEEKLY _         DATE OF DEATH _
                 STREET _           JOBCLASS _          STATE ANNUAL _             TERM DATE _
                STREET2 _            CPI JOB _          LOCAL ANNUAL _           TERM REASON _
                   CITY _           CERT TYPE _         OTHER ANNUAL _      PENSION ELIG DATE _
                  STATE _      PAY SCHEDULE # _              FICA SW _               GHI IND _
                    ZIP _          PAY CYCLE _       FEDERAL W/H INFO _   DOE PAID ERCON FLAG _
              TELEPHONE _        PENSION CODE _         STATE W/H INFO _          CPI INCLUDE _
         PAYROLL STATUS _           RETIRE SW _        GHI INFORMATION _        ENABLE DDP SW _
                    SEX _      TRS SERVICE IND _
                 ETHNIC _     TRS SERVICE LOCK _
                MARITAL _     'NO PENSION' CODE _
           EEO-5 JOB CODE _         SPOUSE SSN _
          HOURS PER WEEK _     PRIOR YEAR CONTMO _
           HOURS PER DAY _      SUBSTITUTE RANK _
         LEAVE REASON MAX _      OVERRIDE ACCRUE _
      BACKGROUND CHK DATE _   ADJ LEAVE ELIG DATE _
             CELL PHONE _        EMERGENCY DATA _
         EMPLOYEE E-MAIL _    BUDGET PAY CATEGORY _
      SICK BANK INDICATOR _        CONTACT DATA _

      F7-Return, F11=Select All, F12=Deselect All, F16=Clear Selections and Exit
    ENTER ✓                     F4   F5   F6   F7            F10 ▼  F11  F12                    19.03.01
    F16 ⬅
```

Step	Action
10	Enter **X** in the field to the right of the desired payroll items.
	Select [F11] *(Select All) or* [F12] *(Deselect All) to select or deselect all payroll items.*
11	Select [F7] (**F7** – Return to Setup Export), or select [ENTER ✓] (**Enter -** Continue) to return to the *Export Selected Payroll/Deduction/CPI Information* main screen.
	Select [F16 ⬅] *(F16 – Clear selections and exit) where appropriate.*

The following screen displays:

NOTE: PCGenesis displays the total number of employee payroll items selected.

Step	Action
12	Select **5** (**F5 -** Select CPI Items) if CPI items are to be exported. *Note:* **F6** *(Select Deductions) is not available when '***I'*** is entered in Step 8 for the* **Export file type***.*

The following screen displays when '**I**' is entered for the **Export file type** in *Step 8*, and all 15 assignments are selected for CPI assignment data:

```
┌──────────────────────────────────────────────────────────────────────────────────┐
│ A  PCG Dist=8991  Rel=19.04.00  01/10/2020  PCG 001  SV  C:\DEVSYS  C:\SECOND    WHITE        ─   □   ×  │
│                                                                           PAY17EXT │
│                     Export Selected Payroll / Deduction / CPI Information           │
│                                                                                    │
│                              Select CPI Fields                                     │
│                                                                                    │
│                                                                                    │
│          Enter 'X' for the item to be reported               Select only one item  │
│                                                                                    │
│          CERT PAY STEP      ASSIGNMENT  1 DATA X                                    │
│          EMPL BASIS CERT    ASSIGNMENT  2 DATA X                                    │
│        ANNUAL CONTR DAYS    ASSIGNMENT  3 DATA X                                    │
│         ADVANCE INHIBIT     ASSIGNMENT  4 DATA X                                    │
│          CERT YEARS EXP _   ASSIGNMENT  5 DATA X                                    │
│           NATIONAL CERT     ASSIGNMENT  6 DATA X                                    │
│      HIGHEST CERT LEVEL     ASSIGNMENT  7 DATA X                                    │
│          LEVEL EFF DATE     ASSIGNMENT  8 DATA X                                    │
│        EMPL BASIS CLASS     ASSIGNMENT  9 DATA X                                    │
│        ANNUAL WORK DAYS     ASSIGNMENT 10 DATA X                                    │
│         LOCAL YEARS EXP _   ASSIGNMENT 11 DATA X                                    │
│        ANNUAL CLASS SAL     ASSIGNMENT 12 DATA X                                    │
│               CERT ID       ASSIGNMENT 13 DATA X                                    │
│           CASE OPEN SW      ASSIGNMENT 14 DATA X                                    │
│          LONG TERM SUB      ASSIGNMENT 15 DATA X                                    │
│             STRIDE ID _                                                             │
│                                                                                    │
│                                                                                    │
│  CPI Employees Only?   ⦿ All Selected                                               │
│                        ○ Only employees with 'Include on CPI' = 'Y'                 │
│                        ○ Only employees with 'Include on CPI' = 'Y', with or without existing CPI data │
│  All 15 assignments must be selected for Export File Type = 'I'.                    │
│  F7-Return, F16=Exit                                                                │
│ ENTER✓         F4   F5   F6   F7          F10▼ F11  F12                19.03.01      │
│ F16◄                                                                                │
└──────────────────────────────────────────────────────────────────────────────────┘
```

Only <u>one</u> category may be selected at a time. However, to import CPI assignment data, all modifiable fields for <u>all 15 assignments</u> on the CPI screen must be selected, as shown above.
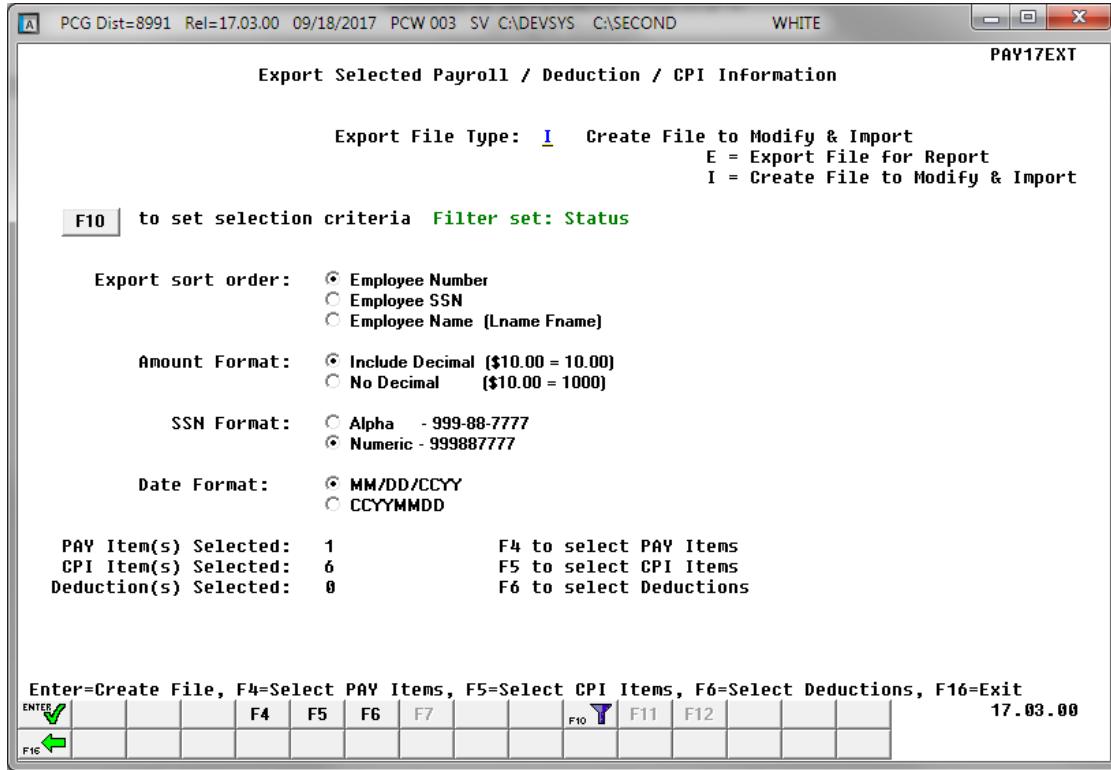
Currently, the only employee fields supported for the import function (**Export file type** = '**I**') are:

- First, Middle, Last Name
- Ethnic Data
- EEO-5 Job Codes
- Hours Per Week
- Hours Per Day
- Leave Reason Maximum
- Background-Check Date
- Cell Phone Number
- Employee E-mail Address
- Sick Bank Indicator
- 'No Pension' Code

- Substitute Rank
- Emergency Contact Data
- Budget Pay Category
- Contact Data
- Annual Work Days
- Pension Eligible Date
- Certified Years Experience
- Local Years Experience
- CPI Assignment Data
- CPI Stride ID

The following screen displays when '**E**' is entered for the **Export file type** in *Step 8*:

Step	Action
13	Enter **X** in the field to the right of the desired CPI items.
14	The option **CPI Employees Only?** will allow the user to select which employees will be extracted. In order to extract only CPI employees (employees with the '**Include on CPI?**' flag set to '**Y**'), toggle the radio button to **Only employees with 'Include on CPI' = 'Y'**. In order to extract only CPI employees (employees with the '**Include on CPI?**' flag set to '**Y**'), and to extract the records whether or not the employee has any existing CPI assignment data, toggle the radio button to **Only employees with 'Include on CPI' = 'Y', with or without existing CPI data**. This option will make it easier to set up the import template for new CPI employees who do not have any CPI assignment data defined yet. If ALL employees are to be extracted, the radio button can be toggled to **All Selected**. If the **All Selected** option is chosen and if an employee does <u>not</u> exist in CPI, the extracted CPI fields will be blank.
15	Select <img> **F7** (**F7** – Return to Setup Export), or select <img> (**Enter** - Continue) to return to the *Export Selected Payroll/Deduction/CPI Information* main screen. Select <img> **F11** (*Select All*) or <img> **F12** (*Deselect All*) or select <img> (*F16 – Clear selections and exit*) where appropriate.

The following screen displays:

NOTE: PCGenesis displays the total number of employee CPI items selected.

Step	Action
16	When 'E' is entered for the **Export file type** in *Step 8*: Select [F6] (**F6 -** Select Deductions) if payroll deduction items are to be exported.
	When 'I' is entered for the **Export file type** in *Step 8*: Proceed to *Step 20*.
	*Note: F6 (Select Deductions) is not available when 'I' is entered for the **Export file type** in Step 8.*

The following screen displays:

```
 PCG Dist=8991 Rel=14.04.00 02/05/2015 PCW 001   C:\DEVSYS  C:\SECOND      WHITE           _ □ ✖
                                                                                        PAY17EXT
                    Export Selected Payroll / Deduction / CPI Information

                            Select Payroll Deduction Fields

      Include deductions with zero dollar amounts? N  (Y or N)

      Enter 'X' for the deduction to be reported.

         00=FRINGE         _    01=ANNUITY #1     _    02=ANNUITY #2     _    03=FED W/H TAX    _
         04=GA INCOME TAX _     07=COUNTY TAXES   _    08=ST MT(N-C) NT _     09=ST MT CERT/NT _
         18=VENDOR 001034 _     19=VENDOR 000020 _     20=VENDOR 000021 _     21=COURT W/H      _
         22=I-UNDR 000014 _     23=I-UNDR 000013 _     36=COURT W/H      _    37=VENDOR 003237 _
         38=I-UNDR 004523 _     39=VENDOR 004807 _     40=VENDOR 004808 _     41=VENDOR 002550 _
         43=CUNION 002602 _     44=I-UNDR 003104 _     45=VENDOR 003104 _     46=I-UNDR 003237 _
         47=I-UNDR 003237 _     48=I-UNDR 003237 _     49=I-UNDR 003499 _     50=I-UNDR 003237 _
         52=I-UNDR 003908 _     53=I-UNDR 004806 _     54=COURT W/H     _     55=I-UNDR 005185 _
         56=I-UNDR 003237 _     57=I-UNDR 004808 _     58=I-UNDR 005621 _     59=VENDOR 005621 _
         60=I-UNDR 005616 _     61=I-UNDR 004808 _     62=VENDOR 000018 _     63=VENDOR 005745 _
         64=I-UNDR 003908 _     65=VENDOR 005621 _     66=VENDOR 006111 _     67=VENDOR 000122 _




      Select up to 20 deduction codes to report.


      F7=Return to Select Fields,  F12=Deselect All,  F16=Exit No Deductions Selected
  ENTER✓                      F4   F5   F6   F7              F10▼ F11  F12                    14.03.00
  F16←
```

NOTE: *The deductions displayed on this screen will be unique to each district or system.*

Step	Action
17	Enter **Y** (Yes) or **N** (No) in response to the **Include deductions with zero dollar amounts?** prompt.
18	Enter **X** in the field to the right of the desired deductions. *PCGenesis allows the selection of twenty (20) individual deductions, and displays "Max of 20 deductions allowed. ## selected." where ## is the total number of deductions, when users select more than twenty (20) deductions.*
19	Select **F7** (**F7** – Return to Setup Export), or select **ENTER✓** (**Enter -** Continue) to return to the *Export Selected Payroll/Deduction/CPI Information* main screen. *Select* **F12** *(Deselect All) or select* **F16←** *(F16 – Clear selections and exit) where appropriate.*

The following screen displays:

NOTE: PCGenesis displays the total number of deductions selected.
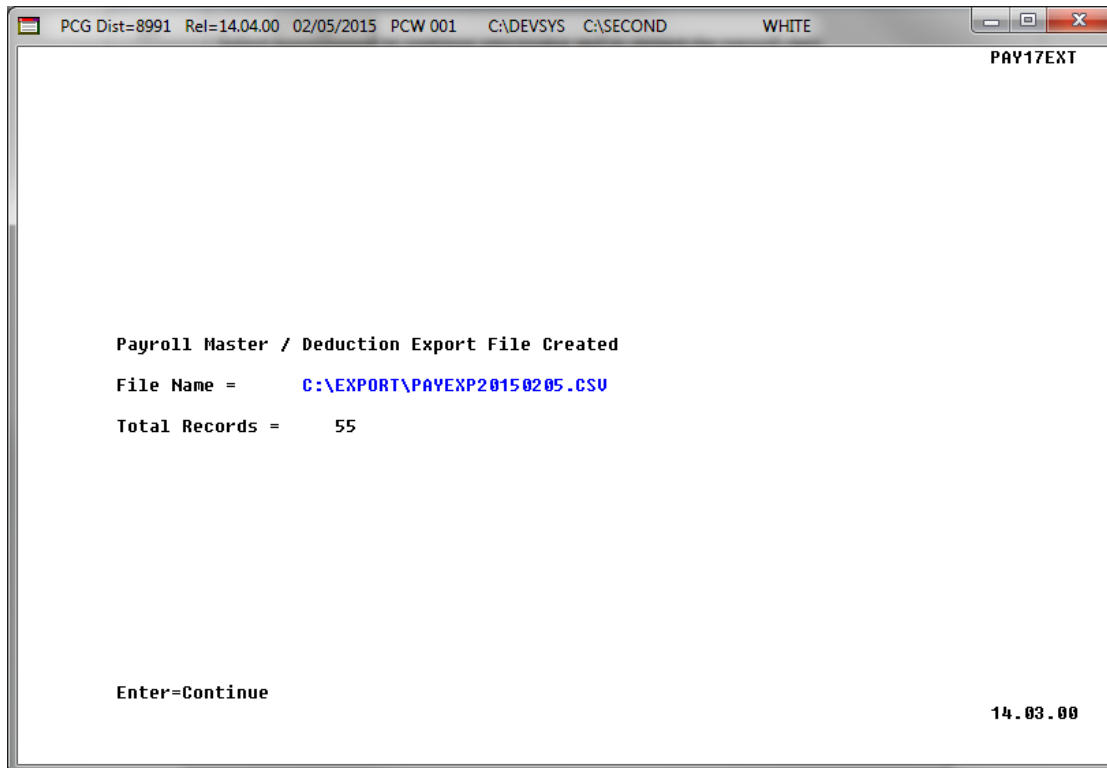
Step	Action
20	**To define the sort order:** Select the ⦿ (**Radio button**) to the left of the desired **Export sort order** field. *Regardless of the sort order selected, PCGenesis always exports the Name, SSN, and Employee Number fields.*
21	**To define the dollar amount format:** Select the ⦿ (**Radio button**) to the left of the appropriate **Amount Format:** field.
22	**To define the Social Security Number (SSN) format:** Select the ⦿ (**Radio button**) to the left of the appropriate **SSN Format:** field.
23	**To define the date format:** Select the ⦿ (**Radio button**) to the left of the appropriate **Date Format:** field.
24	Select ENTER✓ (**Enter - Continue**).

The following message box displays:

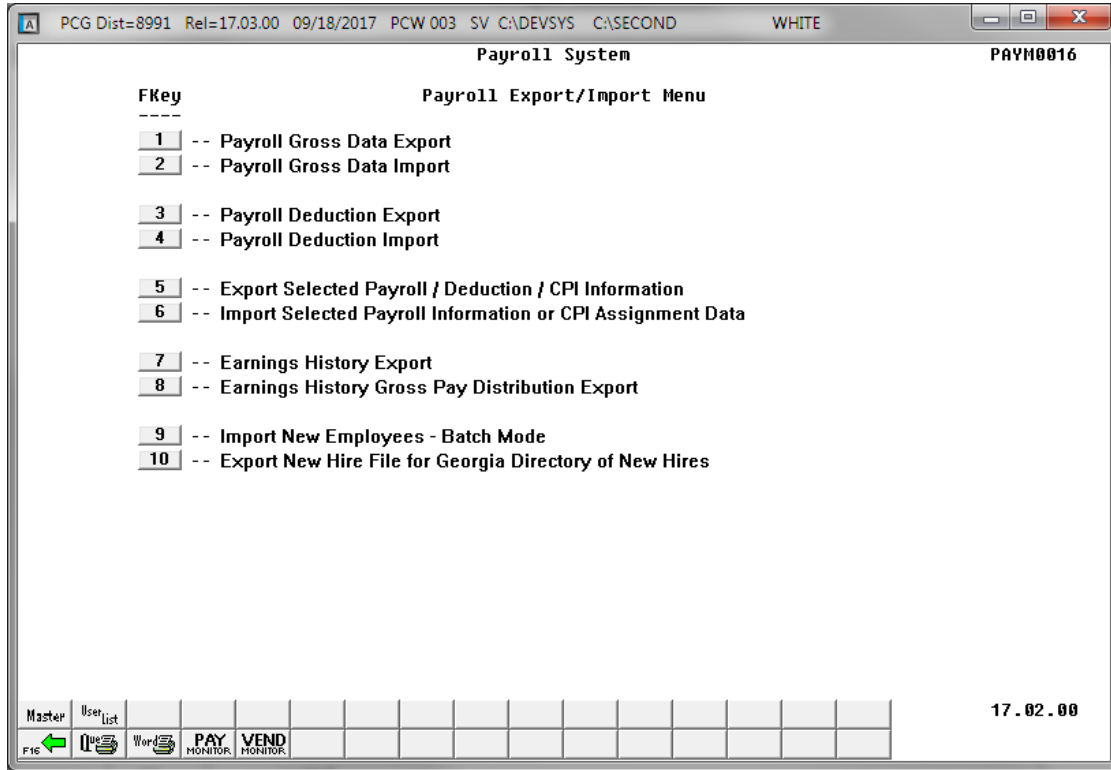| Step	Action
25	Select [OK] to continue processing and to extract the payroll data. *If the selected payroll data is incorrect or incomplete, select* [**Cancel**] *to enter the correct information.* *"**Processing Request**" briefly displays.*

The following screen displays:


```
Payroll Master / Deduction Export File Created

File Name =      C:\EXPORT\PAYEXP20150205.CSV

Total Records =     55
```

Step	Action
26	Screen-print or record the file name displayed and select **Enter** (Continue).

The following screen displays:

Step	Action
27	Select F16 (**F16** - Exit) to return to the *Payroll System – Special Functions Menu,* or select Master (**Master**) to return to the *Business Applications Master Menu.*
28	Navigate to **C:\EXPORT\PAYEXPCCYYMMDD.CSV** where *CCYYMMDD* identifies the calendar year, month and date.

The following window displays:
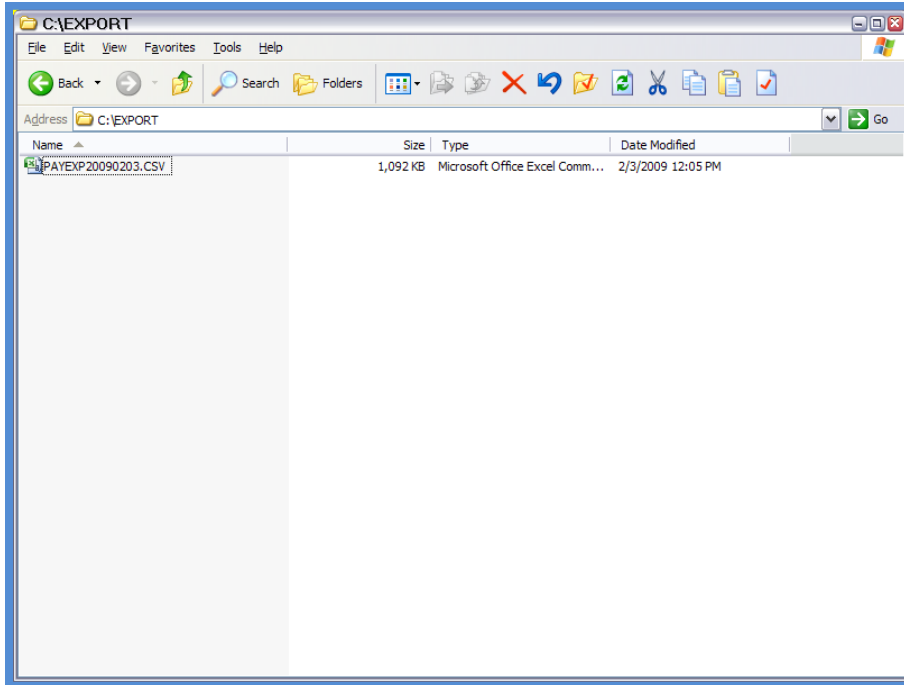
Step	Action
29	Open the appropriate csv file.

The following window displays:

Step	Action
30	Make the appropriate adjustments to the Microsoft® Excel spreadsheet.
	These adjustments may include but are not limited to formatting the columns' widths, the addition and the deletion of certain columns, moving column locations to comply with requesting entity's requirements, and the manual entry of information not maintained in PCGenesis.
31	Select **File → Save As → Excel Workbook**.

The following window displays:

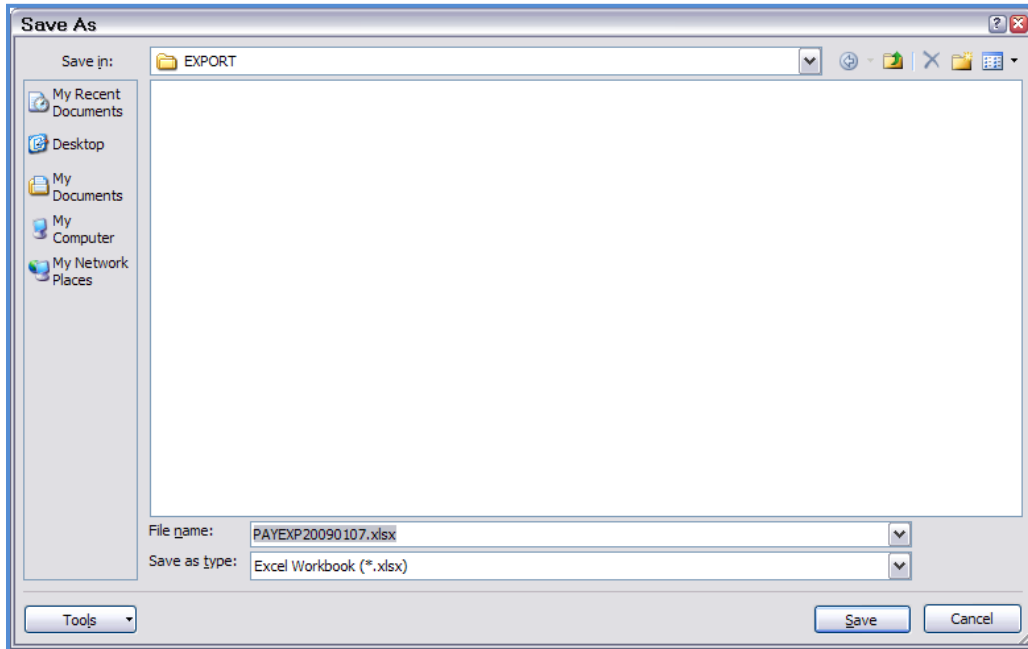| Step	Action
32	Select the **Drop-Down Selection** icon ▼ in the **Save as type** field, and select **CSV (Comma delimited) (*.csv)**.
33	Verify the filename is **C:\EXPORT\PAYEXPCCYYMMDD.CSV** where *CCYYMMDD* identifies the calendar year, month and date.

The following window displays:
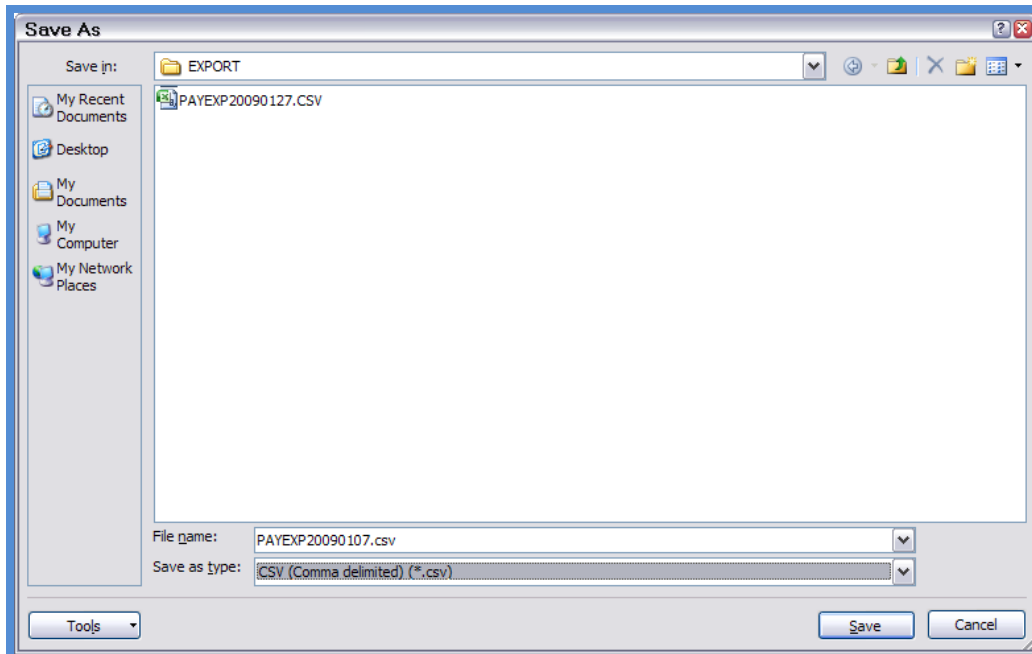
Step	Action
34	Select [Save] (**Save**).

The following dialog box displays:
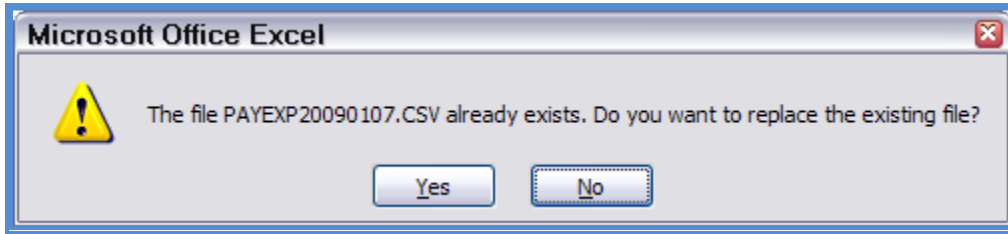
Step	Action
35	Select [Yes] (**Yes**).

The following dialog box displays:
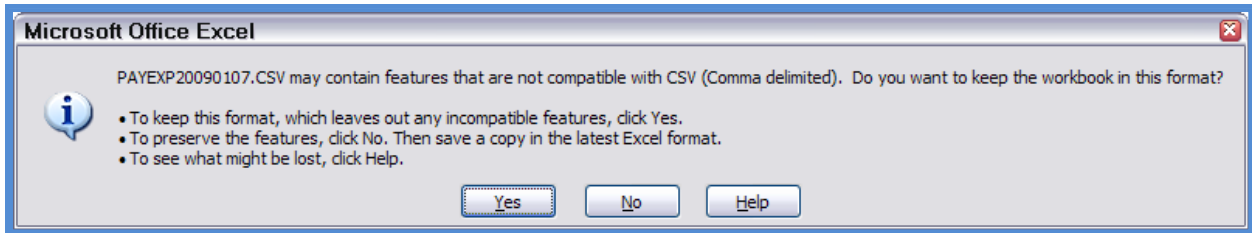
Step	Action
36	Select [Yes] (**Yes**).
37	Close Microsoft® Excel.

The following dialog box displays:
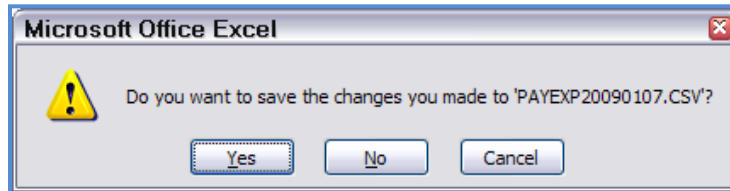
Step	Action
38	Select [No] (**No**). *The appropriate steps to save the changes to the file have already been completed.*
39	Follow the normal processing procedures to submit the Microsoft® Excel spreadsheet to the requesting entity.

Procedure B: Using the Microsoft® Excel Selected Payroll Information Import Procedure

B1. PCGenesis and Microsoft® Excel File Verification

Step	Action
1	Run this procedure after Payroll Setup, but <u>before</u> the *F4 - Calculate Payroll and Update Year-to-Date (YTD)* procedure. Performing this procedure is optional.

B2. Perform a PCGenesis Disk to Disk Backup

Step	Action
1	**<u>From the PCGenesis server, perform a Disk-to-Disk backup:</u>** • Verify all users all logged out of PCGenesis. • Perform a PCGenesis full backup to CD or DVD or USB.
2	Label the backup media *"MM/DD/CCYY – Backup Before Selected Payroll Information Import"*.

B3. Importing the Selected Payroll Information File into PCGenesis
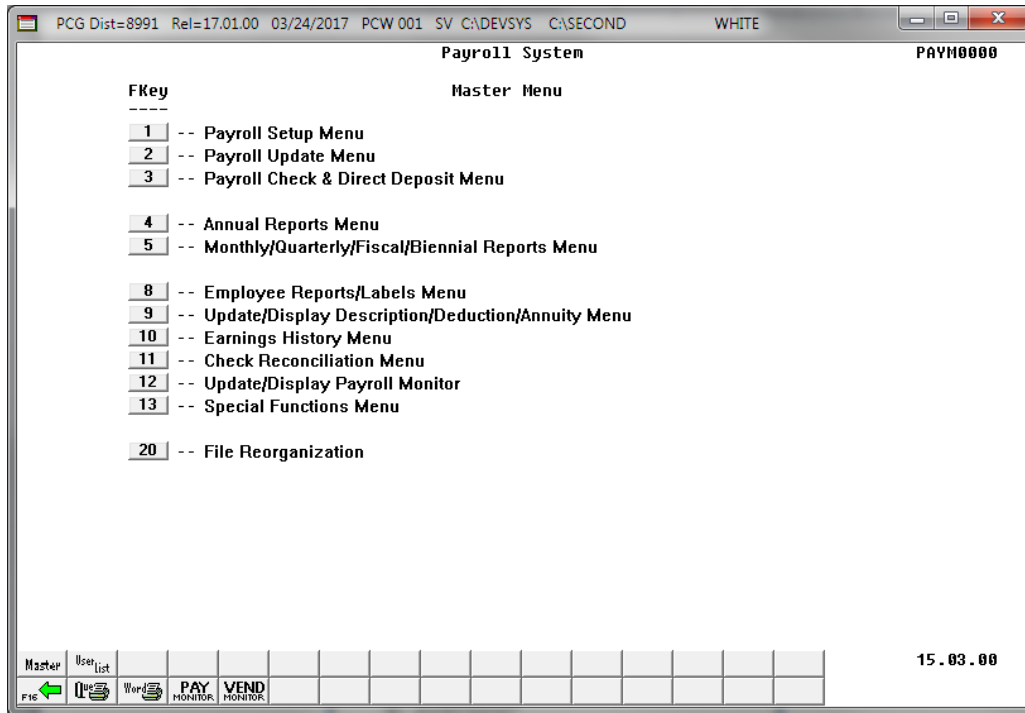
Step	Action
1	Select **13** (**F13 -** Special Functions).
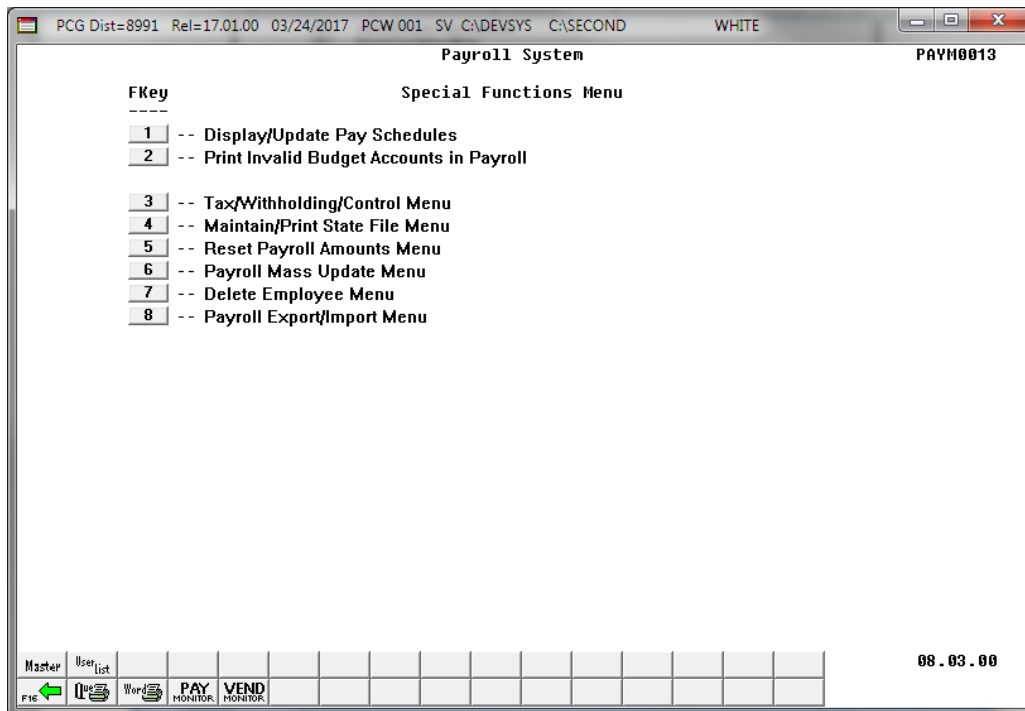
The following screen displays:

Step	Action
2	Select ___8___ (**F8** - Payroll Export/Import Menu).

The following screen displays:
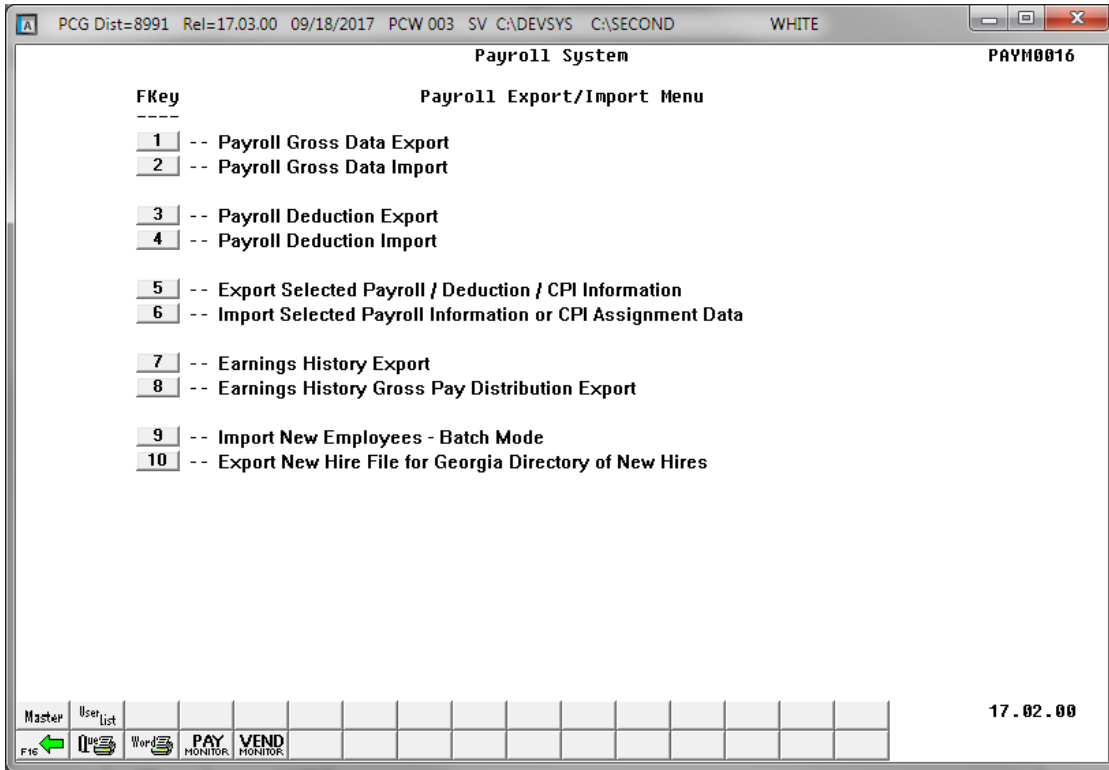
Step	Action
3	Select ___6___ (**F6** – Import Selected Payroll Information).

The following screen displays:

Step	Action
4	**Define which data to import:** Select the ⊙ (**Radio button**) to the left of the desired **Import CPI Assignment Data or Payroll Data?** field.
	Select the appropriate radio button to import either payroll data, or to import CPI assignment data, or to import CPI certified years experience, or to import CPI local years experience, or to import CPI Stride ID, as desired.
5	Verify **C:\IMPORT\PAYIMPccyymmdd.csv** defaults in the field, or select ⬛ **F10** (**F10**) to Browse for file).
6	Select ⬛ **ENTER** (**Enter**) to continue.
	If **Import CPI Assignment Data**, or **CPI certified years experience**, or **CPI local years experience,** or **CPI Stride ID** has been selected, proceed to *Step 7*.
	If **Import Payroll Data** has been selected, proceed to *Step 9*.

If **Import CPI Assignment Data** has been selected, the following dialog box displays:
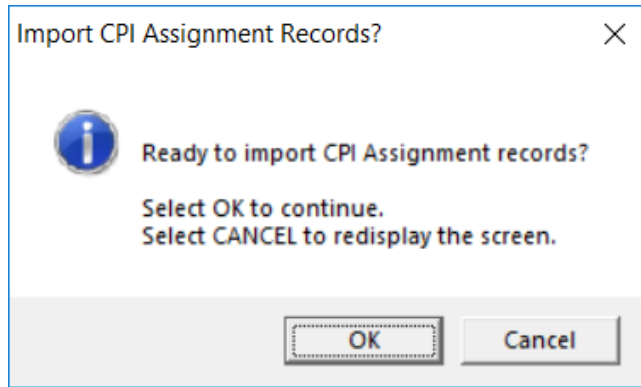
> **Import CPI Assignment Records?**   ✕
>
> ℹ️ Ready to import CPI Assignment records?
>
> Select OK to continue.
> Select CANCEL to redisplay the screen.
>
> [OK]   [Cancel]

If **Import CPI Certified Years Experience** has been selected, the following dialog box displays:

> **Import CPI Certified Years Experience?**   ✕
>
> ℹ️ Ready to import certified years experience records?
>
> Select OK to continue.
> Select CANCEL to redisplay the screen.
>
> [OK]   [Cancel]

If **Import CPI Local Years Experience** has been selected, the following dialog box displays:

> **Import Local Years Experience Records?**   ✕
>
> ℹ️ Ready to import local years experience records?
>
> Select OK to continue.
> Select CANCEL to redisplay the screen.
>
> [OK]   [Cancel]
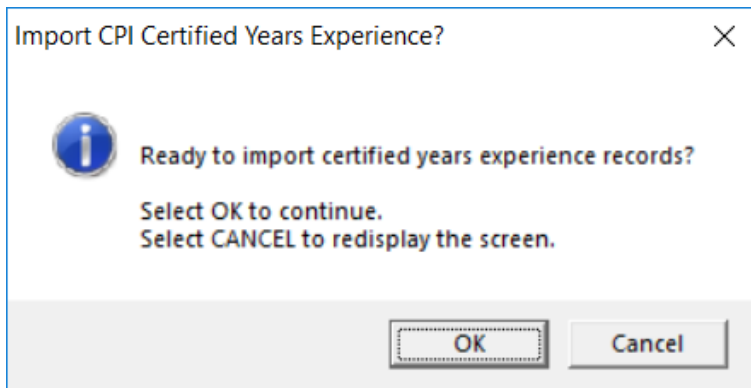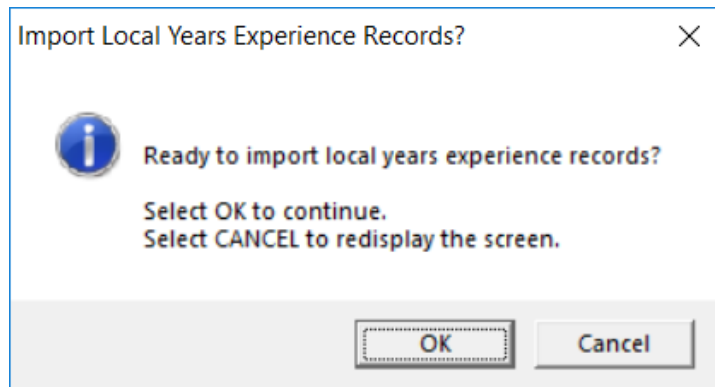
If **Import CPI STRIDE ID** has been selected, the following dialog box displays:

Import CPI STRIDE ID Records?   ✕

ℹ Ready to import CPI STRIDE ID records?

Select OK to continue.
Select CANCEL to redisplay the screen.

[OK]   [Cancel]

Step	Action
7	Select **OK** (**OK**) to continue importing the CPI data. Select **Cancel** (**Cancel**) to return to *Step 4* and to make any necessary corrections.
8	Proceed to *Step 11*.

If **Import Payroll Data** has been selected, the following screen displays:

```
  PCG Dist=8991 Rel=19.04.00 01/10/2020 PCG 001 SV C:\DEVSYS  C:\SECOND        WHITE              ☐  ✕
                        Import Selected Payroll Information                              PAY17IMP

                                 Select Item

             Enter 'X' for the Item to be Imported

              LAST NAME _           PAY LOC            CONTMO            BIRTH DATE
              FIRST NAME _          WORK LOC      ANNUAL WORK DAYS _      HIRE DATE
              MIDDLE NAME _         SECTION 125    CONTRACT GROSS        REHIRE DATE
              NAME SUFFIX           CLASS       CONTRACT BIWEEKLY      DATE OF DEATH
              STREET              JOBCLASS        STATE ANNUAL            TERM DATE
              STREET2              CPI JOB        LOCAL ANNUAL          TERM REASON
              CITY               CERT TYPE       OTHER ANNUAL      PENSION ELIG DATE _
              STATE            PAY SCHEDULE #        FICA SW              GHI IND
              ZIP                PAY CYCLE     FEDERAL W/H INFO   DOE PAID ERCON FLAG
              TELEPHONE        PENSION CODE      STATE W/H INFO         CPI INCLUDE
              PAYROLL STATUS     RETIRE SW      GHI INFORMATION       ENABLE DDP SW
              SEX            TRS SERVICE IND
              ETHNIC _       TRS SERVICE LOCK
              MARITAL       'NO PENSION' CODE _
              EEO-5 JOB CODE _      SPOUSE SSN
              HOURS PER WEEK _  PRIOR YEAR CONTMO
              HOURS PER DAY _   SUBSTITUTE RANK _
              LEAVE REASON MAX _ OVERRIDE ACCRUE
              BACKGROUND CHK DATE _ ADJ LEAVE ELIG DATE
              CELL PHONE _     EMERGENCY DATA _
              EMPLOYEE E-MAIL _ BUDGET PAY CATEGORY _
              SICK BANK INDICATOR _   CONTACT DATA _

       Enter=Continue, F16=Exit
                                                    F10                        19.03.01
```
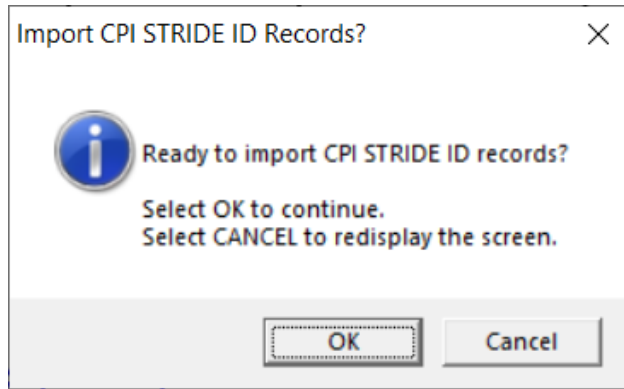
Step	Action
9	Enter **X** in the field to the right of the desired payroll item.
	Select the employee field to import. Only <u>one</u> category may be selected at a time. However, to import employee name data, the modifiable fields for last name, first name, and middle name must all be selected.
	<u>NOTE</u>: Currently, the only employee fields supported for the import function (**Export file type** = '**I**') are:
	- First, Middle, Last Name - Ethnic Data - EEO-5 Job Codes - Hours Per Week - Hours Per Day - Leave Reason Maximum - Background-Check Date - Cell Phone Number - Employee E-mail Address - Sick Bank Indicator 'No Pension' Code - Substitute Rank - Emergency Contact Data - Budget Pay Category - Contact Data - Annual Work Days - Pension Eligible Date
10	Select [ENTER ✓] (**Enter** – continue) to continue.
	"Scanning import file." briefly displays.

If **import file errors** exist, the following error screen displays:

```
 PCG Dist=8991  Rel=14.04.00  02/05/2015  PCW 001    C:\DEVSYS  C:\SECOND        WHITE
                        Import Selected Payroll Information                     PAY17IMP




                           Error(s) in Import File

                      Please review print file with error listing




                  Correct problem(s) in Excel file and recreate Import File














      Enter to exit program and correct
ENTER                                               F10                        14.03.00
F16
```
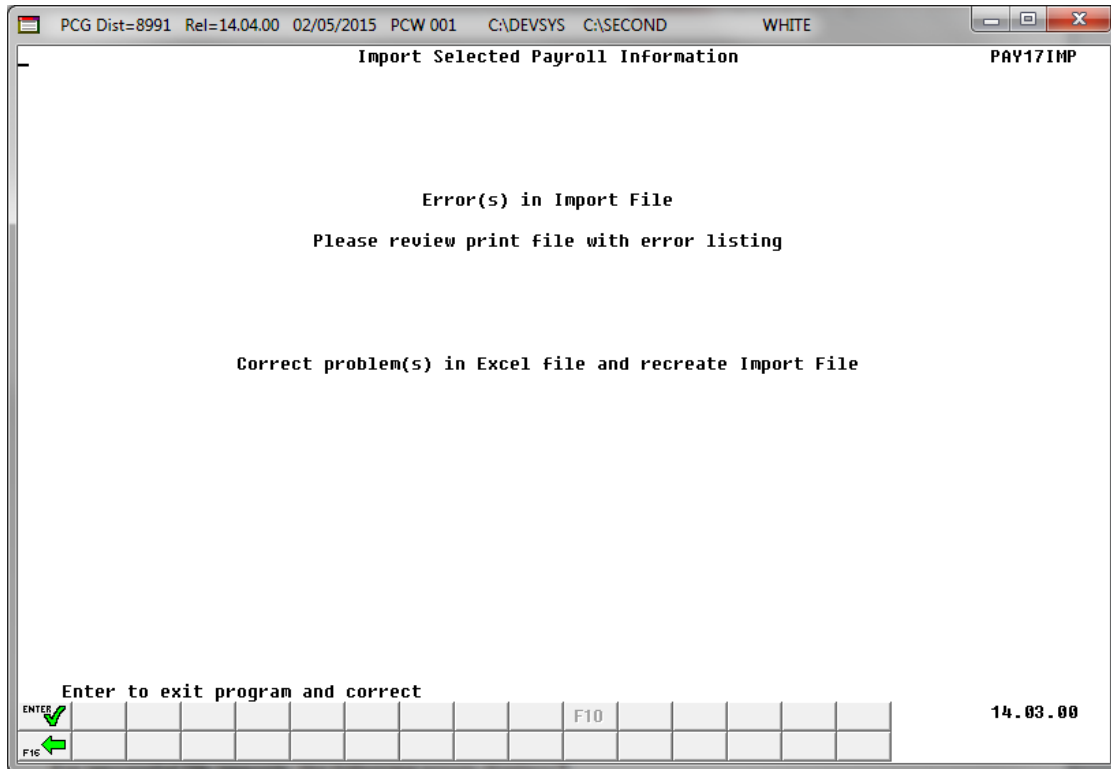
For **successful file imports**, the following screen displays:

```
 PCG Dist=8991  Rel=14.04.00  02/05/2015  PCW 001    C:\DEVSYS  C:\SECOND        WHITE
                        Import Selected Payroll Information                     PAY17IMP




                             No Errors in Import File

                             Please Review Print file


                          Press ENTER to load Import File


                          Press F16 to STOP Process
















ENTER                                               F10                        14.03.00
F16
```

Step	Action
11	**For import file errors**: Go to the PCGenesis print queue and locate the error report. Using the report, make the appropriate corrections to the *.csv* file, and repeat this procedure beginning at *Step 2*. **For successful file imports**: Select [ENTER ✓] (**Enter** - continue) to load the import file. *"Updating employee information." briefly displays.*

The following screen displays:

```
PCG Dist=8991  Rel=17.03.00  09/18/2017  PCW 003  SV  C:\DEVSYS  C:\SECOND          WHITE

                              Payroll System                                      PAYM0016

        FKey                  Payroll Export/Import Menu
        ----
          1   -- Payroll Gross Data Export
          2   -- Payroll Gross Data Import

          3   -- Payroll Deduction Export
          4   -- Payroll Deduction Import

          5   -- Export Selected Payroll / Deduction / CPI Information
          6   -- Import Selected Payroll Information or CPI Assignment Data

          7   -- Earnings History Export
          8   -- Earnings History Gross Pay Distribution Export

          9   -- Import New Employees - Batch Mode
         10   -- Export New Hire File for Georgia Directory of New Hires




                                                                          17.02.00

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

Step	Action
12	**To print the report via the Uqueue Print Manager:** Select [Que] (**Uqueue**). **To print the report via Microsoft® Word:** Select [Word] (**MS WORD**). Follow the instructions provided in the *Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature where appropriate.
13	Select [F16] (**F16** - Exit) to return to the *Payroll System Master Menu,* or select [Master] (**Master**) to return to the *Business Applications Master Menu.*
14	*Refer to Appendix A: Selected Payroll Information Import .csv File Layout and Appendix B: Selected Payroll Information Import File Error Processing for additional error message examples, and for information to aid in the correction of errors. After correcting the error(s), repeat this procedure beginning at Step 2.*

Appendix A: Selected Payroll Information Import .csv File Layout

A1. Import .csv File Layout for Ethnic Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Ethnic Code**	Ethnic Code must contain a valid **Ethnic Code** from the *Description File*.
E	**Ethnic Code Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Hispanic**	Must be 'N' or 'Y'. Indicates whether or not the employee is of Hispanic heritage.
•	*At least one of the next five race fields must be set to 'Y'. Two or more race fields may be selected by setting the value to 'Y'.*	
G	**American Indian**	Must be 'N' or 'Y'. Indicates whether or not the employee is of American Indian heritage.
H	**Black**	Must be 'N' or 'Y'. Indicates whether or not the employee is of Black heritage.
I	**White**	Must be 'N' or 'Y'. Indicates whether or not the employee is of White or Caucasian heritage.
J	**Asian**	Must be 'N' or 'Y'. Indicates whether or not the employee is of Asian heritage.
K	**Hawaiian**	Must be 'N' or 'Y'. Indicates whether or not the employee is of Pacific Islander heritage.
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
L	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
M	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.

Column	Column Heading	Explanation
N	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
O	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
P	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
Q	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
R	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
S	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
T	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes

- Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A2. Import .csv File Layout for EEO-5 Job Code Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**EEO-5 Job Code**	EEO-5 Job Code must contain a valid **EEO-5 Job Code** from the *Alpha Description File*. Table '**EE05**' defines the EEO-5 Job Codes.
E	**EEO-5 Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
F	**Pay Location Code**	Contains a valid **Pay Location Code** from the <u>*Description File*</u>. Visual identification only, PCGenesis ignores the information during the import.
G	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
M	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
N	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A3. Import .csv File Layout for Hours Per Week Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Hours Per Week**	This field must contain the scheduled hours per week for the employee.
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A4. Import .csv File Layout for Hours Per Day Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Hours Per Day**	This field must contain the scheduled hours per day for the employee. *The* **Hours Per Day** *field is necessary when the Enhanced Substitute Pay and Leave System is 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.*
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A5. Import .csv File Layout for Substitute Rank Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Sub Rank**	Contains a valid **Substitute Rank Code** from the *Description File*. Table '**S**' defines the Substitute Rank Codes. The **Substitute Rank** will determine the rate of pay for the substitute in the *Enhanced Substitute and Employee Leave System*.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A6. Import .csv File Layout for Leave Reason Maximum Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Leave Reason Maximum**	This field must contain the leave reason maximum for the employee. The **Leave Reason Maximum** will determine the maximum number of days the employee is allowed to take for a **Reason Code** in the *Enhanced Substitute and Employee Leave System.*
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File.* Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File.* Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File.* Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File.* Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A7. Import .csv File Layout for Background-Check Date Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Background-Check Date**	This field must contain the background-check date for the employee. The data must be in the format MM/DD/CCYY.
• *The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*		
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A8. Import .csv File Layout for Cell Phone Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	SSN	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Cell Phone Number**	This field must contain the cell phone number for the employee. The cell phone number must contain 10 digits, and no dashes or other miscellaneous characters.
• *The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*		
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A9. Import .csv File Layout for E-Mail Address Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**GHI Email Preference**	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). Valid Values: **P** = Send the personal e-mail address to SHBP **W** = Send the work e-mail address to SHBP
E	**Work E-Mail Address**	This field must contain the work e-mail address for the employee. The e-mail address field can contain a maximum of 50 characters. The e-mail address must contain an @ sign.
F	**Personal E-Mail Address**	This field must contain the personal e-mail address for the employee. The e-mail address field can contain a maximum of 50 characters. The e-mail address must contain an @ sign.
•	***The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.***	
G	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
I	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
K	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.

Column	Column Heading	Explanation
N	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
O	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A10. Import .csv File Layout for Sick Bank Indicator Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Sick Bank Indicator**	This field must contain the Sick Bank Indicator for the employee. A '**Y**' indicates that the employee participates in the district's sick bank and an '**N**' indicates that the employee does not participate.
•	*The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*	
E	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
F	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A11. Import .csv File Layout for 'No Pension' Code Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**'No Pension' Code**	Contains a valid **'No Pension' Code** from the drop-down list available for the field on the *Gross Data* screen. The **No pension code** field has been added to support the new *Pension Reporting Compliance File* required by ERSGA. A valid value must be entered in the **No Pension Code** field when the employee's **Pension Code** is set to '**0**', no pension. If the employee is enrolled in a public pension (**Pension Code** values of '**1**' thru '**5**'), then the **No Pension Code** value must be '**00**'.
M	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A12. Import .csv File Layout for Emergency Contact Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Spouse**	Contains the spouse's name.
M	**Next of Kin**	Contains the next of kin's name.
N	**Next of Kin Relationship**	Contains the relationship of the next of kin
O	**Next of Kin Phone Number**	Contains the phone number for the next of kin.
P	**Emergency Contact**	Contains the name of someone who should be contacted in case of emergency.

Column	Column Heading	Explanation
Q	**Emergency Contact Relationship**	Contains the relationship of the emergency contact.
R	**Emergency Contact Phone Number**	Contains the phone number for the emergency contact.
S	**Doctor**	Contains the name of name of the employee's doctor.
T	**Doctor Phone Number**	Contains the phone number for the employee's doctor.
U	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes

- Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A13. Import .csv File Layout for Budget Pay Category

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	SSN	Employee's Social Security Number - must match the SSN within the Payroll file.
C	Last Name/First Name	Visual identification only, PCGenesis ignores the information during the import.
D	Pay Location Code	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	Pay Location Description	Visual identification only, PCGenesis ignores the information during the import.
F	Work Location Code	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	Work Location Desc	Visual identification only, PCGenesis ignores the information during the import.
H	Class Code	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	Class Code Description	Visual identification only, PCGenesis ignores the information during the import.
J	Job Code	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	Job Code Description	Visual identification only, PCGenesis ignores the information during the import.
L	Budget Pay Category	Contains a valid **Budget Pay Category Code** from the *Description File*. Table '**B**' defines budget pay categories. The **Budget Pay Category** field is used in the *PCGenesis Budget System*. The **Budget Pay Category** field on the employees' *Gross Data Screen* will determine which user-defined salary schedule to access for budget processing.
M	Contract Months	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A14. Import .csv File Layout for Contact Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Street**	This field must contain the first street address for the employee.
M	**Street 2**	This field must contain the second street address for the employee.
N	**City**	This field must contain the city the employee resides in.
O	**State**	This field must contain the state the employee resides in.
P	**Zip**	This field must contain the zip code the employee resides in.
Q	**Telephone**	This field must contain the phone number for the employee. The cell phone number must contain 10 digits, and no dashes or other miscellaneous characters.

Column	Column Heading	Explanation
R	**Hours Per Week**	This field must contain the scheduled hours per week for the employee.
S	**Cell Phone**	This field must contain the cell phone number for the employee. The cell phone number must contain 10 digits, and no dashes or other miscellaneous characters.
T	**Work E-mail**	This field must contain the work e-mail address for the employee. The e-mail address field can contain a maximum of 50 characters. The e-mail address must contain an @ sign.
U	**Personal E-mail**	This field must contain the personal e-mail address for the employee. The e-mail address field can contain a maximum of 50 characters. The e-mail address must contain an @ sign.
V	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A15. Import .csv File Layout for Annual Work Days

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**Contract Days / Annual Work Days**	Contains the number of days the employee works per year. The **Annual Work Days** field is required for CPI processing. The **Annual Work Days** field is also used in the *PCGenesis Budget System.*

Miscellaneous Notes

- Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A16. Import .csv File Layout for Pension Eligible Date

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**Pension Eligible Date**	This field must contain the pension eligible date for the employee. The data must be in the format MM/DD/CCYY.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A17. Import .csv File Layout for Employee Name Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
The system uses Columns D, E, and F to update the data. Column C will contain the <u>old</u> employee name and is not considered when importing the new employee name fields from Columns D, E, and F.		
D	**Last Name**	Must contain the employee's last name up to 20 characters.
E	**First Name**	Must contain the employee's first name up to 15 characters.
F	**Middle Name**	Must contain the employee's middle name up to 15 characters.
• *The remaining columns in the spreadsheet are available for visual identification only. PCGenesis ignores the information during the import.*		
G	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
H	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
I	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
J	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
K	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
L	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
M	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
N	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.

Column	Column Heading	Explanation
O	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A18. Import .csv File Layout for CPI Certified Years Experience

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**CPI Include Flag**	Indicates whether or not the employee is included in the CPI subsystem. Visual identification only, PCGenesis ignores the information during the import.
N	**Certified Years Experience**	Contains the number of years of creditable service for certified employees.

Miscellaneous Notes

- Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A19. Import .csv File Layout for CPI Local Years Experience

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**CPI Include Flag**	Indicates whether or not the employee is included in the CPI subsystem. Visual identification only, PCGenesis ignores the information during the import.
N	**Local Years Experience**	Contains the number of years the employee has been assigned local years of experience.

Miscellaneous Notes
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A20. Import .csv File Layout for CPI Stride ID

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**CPI Include Flag**	Indicates whether or not the employee is included in the CPI subsystem. Visual identification only, PCGenesis ignores the information during the import.
N	**STRIDE ID**	Contains employee's CPI **Stride ID** assigned by the Ga DOE. The Stride ID is a 8 digit number.

Miscellaneous Notes

- Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.

A21. Import .csv File Layout for CPI Assignment Data

Column	Column Heading	Explanation
A	**Employee ID Number**	<u>Mandatory</u>: Must be the employee's payroll ID number.
B	**SSN**	Employee's Social Security Number - must match the SSN within the Payroll file.
C	**Last Name/First Name**	Visual identification only, PCGenesis ignores the information during the import.
D	**Pay Location Code**	Contains a valid **Pay Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
E	**Pay Location Description**	Visual identification only, PCGenesis ignores the information during the import.
F	**Work Location Code**	Contains a valid **Work Location Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
G	**Work Location Desc**	Visual identification only, PCGenesis ignores the information during the import.
H	**Class Code**	Contains a valid **Class Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
I	**Class Code Description**	Visual identification only, PCGenesis ignores the information during the import.
J	**Job Code**	Contains a valid **Job Code** from the *Description File*. Visual identification only, PCGenesis ignores the information during the import.
K	**Job Code Description**	Visual identification only, PCGenesis ignores the information during the import.
L	**Contract Months**	Contains the employee's number of contracted months. Visual identification only, PCGenesis ignores the information during the import.
M	**CPI Include Flag**	Contains **Y** (Yes) or **N** (No). A value of '**Y**' in the **CPI Include Flag** indicates that the employee will be included within the *Certified/Classified Personnel Information (CPI)* module. This field is for visual identification only; PCGenesis ignores the information during the import.

Column	Column Heading	Explanation
-3: **Columns N – W contain data for CPI Assignment 1**		
N	**1 - Assignment Type**	Contains a **C** (Certified) or **N** (Non-Certified) for CPI assignment 1. *Must be 1 character.*
O	**1 - School/Work Location**	Contains the employee's school or work location code for CPI assignment 1. *Must be 4 digits. Must be a valid value on the Payroll Location table.*
P	**1 - Job Code**	Contains the employee's area of employment code for CPI assignment 1. *Must be 3 digits. Must be a valid value on the CPI Job Code table.*
Q	**1 - Subject Matter**	Contains the State-funded course code for CPI assignment 1. *The Subject Matter field is valid for Certified (C) Assignment Type only.* *Must be 3 characters. Must be a valid value on the CPI Subject Matter Code table.*
R	**1 - Field Code**	Contains the employee's PSC-assigned certificate field code for CPI assignment 1. *The Field Code field is valid for Certified (C) Assignment Type only.* *The combination of the Field Code and Certificate Type must be a valid certificate for the employee.* *Must be 3 digits. Must be a valid value on the CPI Certificate Field Code table.*
S	**1 - Certificate Type**	Contains the employee's PSC-assigned certificate type code for CPI assignment 1. *The Certificate Type field is valid for Certified (C) Assignment Type only.* *The combination of the Field Code and Certificate Type must be a valid certificate for the employee.* *Must be 3 characters. Must be a valid value on the CPI Certificate Type Code table.*
T	**1 - 2ndary Fund Code**	Contains the employee's salary fund code, other than from Quality Based Education (QBE) funds, for CPI assignment 1. *Must be 2 digits. Must be a valid value on the CPI Secondary Fund Code table.*

Column	Column Heading	Explanation
U	**1 – Consolidated Fund Flag**	Contains an **Y** (In Consolidated Funding) or **N** (Not in Consolidated Funding) for CPI assignment 1. *Must be 1 character, Y or N.*
V	**1 - Assignment %**	Contains the percentage (%) of time the employee spends on CPI assignment 1. *Must be 4 digits with 1 decimal digit (999.9).*
W	**Space Holder**	Reserved for future use.

Columns X – AG contain data for CPI Assignment 2

Columns X – AG contain the data for Assignment 2.

These columns repeat the contents required for Assignment 1. Therefore, **Column X** is Assignment Type, **Y** is School/Work Location, **Z** is Job Code, **AA** is Subject Matter, **AB** is Field Code, **AC** is Certificate Type, **AD** is 2ndary Fund Code, **AE** is Consolidated Fund Flag, **AF** is Assignment % and **AG** is a space holder for Assignment 2.

Columns AH – AQ contain data for CPI Assignment 3

Columns AH – AQ contain the data for Assignment 3.

These columns repeat the contents required for Assignment 1. Therefore, **Column AH** is Assignment Type, **AI** is School/Work Location, **AJ** is Job Code, **AK** is Subject Matter, **AL** is Field Code, **AM** is Certificate Type, **AN** is 2ndary Fund Code, **AO** is Consolidated Fund Flag, **AP** is Assignment % and **AQ** is a space holder for Assignment 3.

Columns AR – BA contain data for CPI Assignment 4

Columns AR – BA contain the data for Assignment 4.

These columns repeat the contents required for Assignment 1. Therefore, **Column AR** is Assignment Type, **AS** is School/Work Location, **AT** is Job Code, **AU** is Subject Matter, **AV** is Field Code, **AW** is Certificate Type, **AX** is 2ndary Fund Code, **AY** is Consolidated Fund Flag, **AZ** is Assignment % and **BA** is a space holder for Assignment 4.

Columns BB – BK contain data for CPI Assignment 5

Columns BB – BK contain the data for Assignment 5.

These columns repeat the contents required for Assignment 1. Therefore, **Column BB** is Assignment Type, **BC** is School/Work Location, **BD** is Job Code, **BE** is Subject Matter, **BF** is Field Code, **BG** is Certificate Type, **BH** is 2ndary Fund Code, **BI** is Consolidated Fund Flag, **BJ** is Assignment % and **BK** is a space holder for Assignment 5.

Columns BL – BU contain data for CPI Assignment 6

Columns BL – BU contain the data for Assignment 6.

These columns repeat the contents required for Assignment 1. Therefore, **Column BL** is Assignment Type, **BM** is School/Work Location, **BN** is Job Code, **BO** is Subject Matter, **BP** is Field Code, **BQ** is Certificate Type, **BR** is 2ndary Fund Code, **BS** is Consolidated Fund Flag, **BT** is Assignment % and **BU** is a space holder for Assignment 6.

Column	Column Heading	Explanation
	Columns BV – CE contain data for CPI Assignment 7	
	Columns BV – CE contain the data for Assignment 7. These columns repeat the contents required for Assignment 1. Therefore, **Column BV** is Assignment Type, **BW** is School/Work Location, **BX** is Job Code, **BY** is Subject Matter, **BZ** is Field Code, **CA** is Certificate Type, **CB** is 2ndary Fund Code, **CC** is Consolidated Fund Flag, **CD** is Assignment % and **CE** is a space holder for Assignment 7.	
	Columns CF – CO contain data for CPI Assignment 8	
	Columns CF – CO contain the data for Assignment 8. These columns repeat the contents required for Assignment 1. Therefore, **Column CF** is Assignment Type, **CG** is School/Work Location, **CH** is Job Code, **CI** is Subject Matter, **CJ** is Field Code, **CK** is Certificate Type, **CL** is 2ndary Fund Code, **CM** is Consolidated Fund Flag, **CN** is Assignment % and **CO** is a space holder for Assignment 8.	
	Columns CP – CY contain data for CPI Assignment 9	
	Columns CP – CY contain the data for Assignment 9. These columns repeat the contents required for Assignment 1. Therefore, **Column CP** is Assignment Type, **CQ** is School/Work Location, **CR** is Job Code, **CS** is Subject Matter, **CT** is Field Code, **CU** is Certificate Type, **CV** is 2ndary Fund Code, **CW** is Consolidated Fund Flag, **CX** is Assignment % and **CY** is a space holder for Assignment 9.	
	Columns CZ – DI contain data for CPI Assignment 10	
	Columns CZ – DI contain the data for Assignment 10. These columns repeat the contents required for Assignment 1. Therefore, **Column CZ** is Assignment Type, **DA** is School/Work Location, **DB** is Job Code, **DC** is Subject Matter, **DD** is Field Code, **DE** is Certificate Type, **DF** is 2ndary Fund Code, **DG** is Consolidated Fund Flag, **DH** is Assignment % and **DI** is a space holder for Assignment 10.	
	Columns DJ – DS contain data for CPI Assignment 11	
	Columns DJ – DS contain the data for Assignment 11. These columns repeat the contents required for Assignment 1. Therefore, **Column DJ** is Assignment Type, **DK** is School/Work Location, **DL** is Job Code, **DM** is Subject Matter, **DN** is Field Code, **DO** is Certificate Type, **DP** is 2ndary Fund Code, **DQ** is Consolidated Fund Flag, **DR** is Assignment % and **DS** is a space holder for Assignment 11.	
	Columns DT – EC contain data for CPI Assignment 12	
	Columns DT – EC contain the data for Assignment 12. These columns repeat the contents required for Assignment 1. Therefore, **Column DT** is Assignment Type, **DU** is School/Work Location, **DV** is Job Code, **DW** is Subject Matter, **DX** is Field Code, **DY** is Certificate Type, **DZ** is 2ndary Fund Code, **EA** is Consolidated Fund Flag, **EB** is Assignment % and **EC** is a space holder for Assignment 12.	

Column	Column Heading	Explanation
Columns ED – EM contain data for CPI Assignment 13		
Columns ED – EM contain the data for Assignment 13. These columns repeat the contents required for Assignment 1. Therefore, **Column ED** is Assignment Type, **EE** is School/Work Location, **EF** is Job Code, **EG** is Subject Matter, **EH** is Field Code, **EI** is Certificate Type, **EJ** is 2ndary Fund Code, **EK** is Consolidated Fund Flag, **EL** is Assignment % and **EM** is a space holder for Assignment 13.		
Columns EN – EW contain data for CPI Assignment 14		
Columns EN – EW contain the data for Assignment 14. These columns repeat the contents required for Assignment 1. Therefore, **Column EN** is Assignment Type, **EO** is School/Work Location, **EP** is Job Code, **EQ** is Subject Matter, **ER** is Field Code, **ES** is Certificate Type, **ET** is 2ndary Fund Code, **EU** is Consolidated Fund Flag, **EV** is Assignment % and **EW** is a space holder for Assignment 14.		
Columns EX – FG contain data for CPI Assignment 15		
Columns EX – FG contain the data for Assignment 15. These columns repeat the contents required for Assignment 1. Therefore, **Column EX** is Assignment Type, **EY** is School/Work Location, **EZ** is Job Code, **FA** is Subject Matter, **FB** is Field Code, **FC** is Certificate Type, **FD** is 2ndary Fund Code, **FE** is Consolidated Fund Flag, **FF** is Assignment % and **FG** is a space holder for Assignment 15.		
Miscellaneous Notes		
• Validations occur during the examination of the load file and again during the actual employee update process. If errors are detected during the error checking, PCGenesis halts the update, and requires the user to manually correct the employee's information, and to rerun the selected payroll information import procedure. If detected during the update, a dialog box displays informing the user that the specific data for the specific employee will not be updated. In this instance, the selected payroll information import is complete with the exception of those employees for whom a dialog box was displayed. Manually complete these employees' information.		

Appendix B: Selected Payroll Information Import File Error Processing

For **import file errors**, the following is an example of an import file error screen:

```
PCG Dist=8991  Rel=12.03.00  11/06/2012  PCW 002    C:\DEVSYS  C:\SECOND         WHITE              _ □ X
                                  Import Selected Payroll Information                          PAY17IMP
 _



                                       Error(s) in Import File

                                Please review print file with error listing




                            Correct problem(s) in Excel file and recreate Import File
```

```
      Enter to exit program and correct
 ENTER ✓                                                           F10                              12.03.00
 F16 ⇐
```
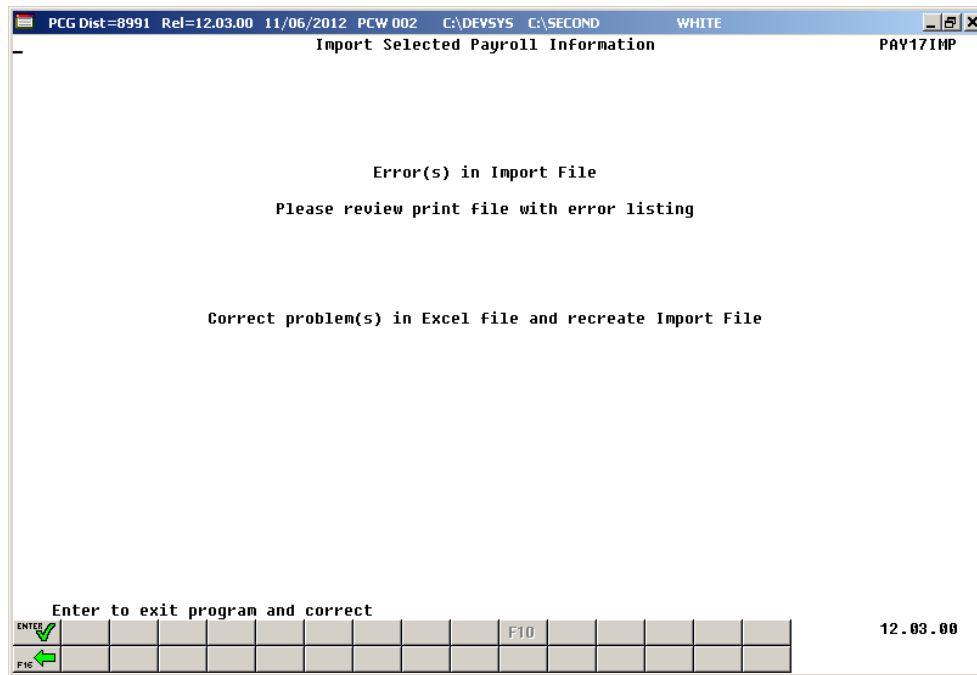
B1. Special Payroll Information Import Error Report - Example

```
DATE     09/15/2009   PAY17IMP               PAYROLL IMPORT REPORT                                   Page      1

EmpNo SSN         Name                Ethnic Description     Hisp  AmrIn Black White Asian Hawai Error Message

86892 999086892 CA9RIER   TH9RON       02   WHITE            N     N     Y     N     Y     N
86893 999086893 DE8ONG    CA8SON       02   WHITE            Y     N     Y     N     N     N
86894 999086894 EA7L   RE7A            03   HISPANIC         Y     N     N     Y     N     N
86895 999086895 GU6VARA   RE6AY        02   WHITE                                          At Least 1 Race Required
86896 999086896 NA5UIN   SH5LTON       03   HISPANIC                                       At Least 1 Race Required
86897 999086897 WO4DALL   RO4ELIA      02   WHITE                                          At Least 1 Race Required
86898 999086898 BO3TON   SO3NY         02   WHITE                                          At Least 1 Race Required
86899 999086899 CO2ER   RO2IO          03   HISPANIC                                       At Least 1 Race Required
86900 999086900 FL9NT   WI9FORD        02   WHITE                                          At Least 1 Race Required
86901 999086901 RE8UES   BO8KER        03   HISPANIC                                       At Least 1 Race Required
86902 999086902 BL7SS   RO7            02   WHITE                                          At Least 1 Race Required
86903 999086903 IS6AC   SA6E           03   HISPANIC                                       At Least 1 Race Required
```

These errors will include employees' ID number, social security number, name, ethnic code, and ethnicity/race indicators along with the error message. Compare the error(s) identified in the report to the .csv file's spreadsheet to determine the appropriate corrective measures.

PCGenesis errors within the previous screenshot examples apply to the spreadsheet screenshot example below. User results are school district- and system-specific. Additional errors can occur when users attempt to create the .csv file without using the GaDOE-provided spreadsheet template provided, <u>and</u> the file is missing required data.

B2. Special Payroll Information Import .csv File – Example