



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

3/23/2022

**Section F: CPI In-Progress Report and
Transmission File Processing, V2.12**

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Overview

CPI In-Progress Report and transmission file processing includes the following procedures:

CPI In-Progress Report: The *In-Progress Report* includes the CPI transmission file results, and will print even if errors are present. Print the report as often as necessary.

CPI Transmission File: PCGenesis creates the CPI transmission file for transmission via the *MyGaDOE* Web portal for reporting purposes. Although the transmission file may be transmitted with errors, the *Certified/Classified Employees' Error Listing* should be printed, and errors corrected before the CPI transmission file is processed. Refer to *Section E: CPI Report Processing* for the instructions on printing the *Certified/Classified Employees' Error Listing*. As with the *CPI In-Progress Report*, the transmission file may be created as often as is needed.

The CPI transmission file is submitted to the GaDOE during three CPI reporting periods identified as Period 1, Period 2, and Period 3. Period 3 is generally known as the CPI leave reporting cycle. Long term substitutes and third-party contractors are not reported to the GaDOE for CPI reporting period 3 (leave reporting).

The CPI transmission file may contain up to four different record types:

Personnel Demographic Information – A01 record: The demographic information (A01 record) contains basic demographic information for employees such as name, date of birth, ethnicity, and gender. Long term substitutes report only demographic information (A01 record) to the GaDOE. This record is reported in every CPI cycle. However, the A01 record is not produced for long term substitutes and third-party contractors for CPI reporting period 3 (leave reporting).

Salary Information – B01 record: The salary information (B01 record) contains further demographic information such as contract days, salary, years of experience, and certificate level for classified employees. Long term substitutes and third-party contractors do not report salary information (B01 record) to the GaDOE. The B01 record is reported to the GaDOE for CPI reporting periods 1 and 2.

Assignment Information – Cnn record: The assignment information (Cnn records) contains information regarding the employees' assignments. There can be up to 15 Cnn records (assignments) for each employee. Long term substitutes do not report assignment information (Cnn records) to the GaDOE. The Cnn records are reported to the GaDOE for CPI reporting periods 1 and 2.

Leave information – Dnn record: The leave information (Dnn records) contains the total number of days used for the following categories: paid sick, paid staff development, paid vacation, COVID, parental, and other paid leave. There can be up to five Dnn records for each employee. If the employee earns leave for more than two assignments and the leave earned in each assignment is independent of the leave earned in the other assignment(s), then two or more leave records **MUST** be reported. Long term substitutes and third-party contractors do not report leave information (Dnn records) to the GaDOE.

The Dnn records are submitted to the GaDOE for CPI reporting period 3 ONLY.

Long Term Substitute Information: Substitute employees, payroll class type 'S', who are employed by the school district for six (6) weeks to fill in for a vacant permanent position, or to temporarily replace a regular contractual employee who is currently on leave, are considered "Long Term Substitutes". Although these employees do not receive training and experience compensation, they are included within Certified/Classified Personnel Information (CPI) reporting.

CPI Cycle 3 Leave Reporting

CPI Cycle 3 Leave Processing can be viewed as taking place in three distinct phases: (1) **Payroll Phase** - loading leave into payroll for printing on the pay stub. This is phase is optional. (2) **Personnel Phase** - importing the leave from payroll into the *Leave of Absence File*, or manually creating the *Leave of Absence File*. (3) **CPI Phase** - extracting the leave data from the *Leave of Absence File* into the *CPI Transmission File*.

CPI Cycle 3 Leave Reporting Checklist		
Payroll and Personnel Phases		
√	Step	Action
	1	<p>PCGenesis Leave System Users Only: Executing <u>all</u> of <i>Step 1</i> assumes that leave data is already available in PCGenesis. This is the case if employee leave data is displayed on the <i>Update/Display Balance and YTD Leave</i> screen in payroll.</p> <ul style="list-style-type: none"> • The leave data on the <i>Update/Display Balance and YTD Leave</i> screen may have been imported from a third party leave system during payroll processing. • Leave data will also be available for users of the new <i>Enhanced Substitute Pay and Employee Leave System</i>. <p><i>Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure E: Updating/Displaying Leave Data</i></p>
	1.1	<p>Create the <i>Original Leave of Absence</i> file. The <i>Original Leave of Absence File</i> will be created using leave data from payroll.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 3: Creating the Original Leave of Absence File</i></p>
	1.2	<p>Skip <i>Step 2</i> and proceed to <i>Step 3</i>.</p>

CPI Cycle 3 Leave Reporting Checklist		
Payroll and Personnel Phases - Continued		
√	Step	Action
	2	<p>Import Leave Data for CPI Reporting Only: Executing <u>all</u> of <i>Step 2</i> assumes that leave data is NOT currently available in PCGenesis. This is the case if there is no employee leave data displayed on the <i>Update/Display Balance and YTD Leave</i> screen in payroll.</p> <p><i>Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure E: Updating/Displaying Leave Data</i></p>
	2.1	<p>To suppress printing leave on checks/direct deposits: Set the Print Leave on Checks option to ‘N’ on the <i>Payroll Control Information</i> screen. This will allow leave data to be imported into PCGenesis without having the data appear on employees’ pay statements.</p> <p><i>Payroll System Operations Guide, Section I: Special Functions, Topic 3: Tax Tables/Withholding/Control Information Processing</i></p>
	2.2	<p>Optional: Perform the <i>Import Employee Leave Data</i> function on the <i>CPI Report and Data Transmission Menu</i> to import leave data into the PCGenesis system.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 2: Import Employee Leave Data</i></p>
	2.3	<p>Create the <i>Original Leave of Absence</i> file.</p> <ul style="list-style-type: none"> • If leave data has been imported (<i>Step 2.2</i>) or keyed into the data entry <u>payroll</u> screens, the <i>Original Leave of Absence File</i> will be created using leave data from payroll. • If leave data has NOT been entered into payroll, the <i>Original Leave of Absence File</i> will be created as an <u>empty file</u>. <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 3: Creating the Original Leave of Absence File</i></p>
	3	<p>Maintain the <i>Leave of Absence</i> file as needed.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 4: Leave of Absence File Maintenance</i></p>
	4	<p>Print the <i>Leave of Absence</i> file.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 5: Printing the Leave of Absence Report</i></p>

CPI Cycle 3 Leave Reporting Checklist		
CPI Phase		
✓	Step	Action
	5	<p>Create the CPI In-Progress Report and the CPI Data Transmission File: PCGenesis creates the CPI transmission file for transmission via the <i>MyGaDOE</i> Web portal for reporting purposes. Period 3 is generally known as the CPI <u>leave</u> reporting cycle and transmits the leave data from the <i>Original Leave of Absence</i> file to Data Collections.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 1: Creating the CPI In-Progress Report and/or the CPI Data Transmission File</i></p>
	5.1	<p>Print the CPI In-Progress Report: Verify the leave data in the CPI Cycle 3 transmission file by reviewing the <i>CPI In-Progress Report</i>.</p> <p><i>Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 1B.1: CPI In-Progress Report - Example</i></p>

Payroll Phase: PCGenesis allows display of and modification to employees' leave information for *State* and *Local* categories including **Sick, Personal/Business, Vacation, Other, Leave without Pay, Staff Development, or Sick Bank.**

Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information* for instructions on maintaining leave data within payroll. When updating current leave totals, PCGenesis automatically updates employees' *Balance* and *Used YTD (Used Year-to-Date)* totals. Negative (-) entries may not be made to the *Balance*, and *Used YTD* totals. PCGenesis clears existing current leave usage totals when a new payroll is set up. Leave should reflect leave usage for the current payroll.

Employee leave data displayed on the *Update/Display Balance and YTD Leave* screen may be populated from the following sources:

- The leave data on the *Update/Display Balance and YTD Leave* screen may have been imported from a third party leave system during payroll processing.
- Leave data will also be available for users of the new *Enhanced Substitute Pay and Employee Leave System*.

Import Leave Data for CPI Reporting Only: If leave data is NOT available on the *Update/Display Balance and YTD Leave* screen, refer to the *Topic 2: Import Employee Leave Data* for instructions on uploading leave data from a comma separated file. The *Import Employee Leave Data* procedure allows for the upload of a current leave, year-to-date leave, and leave balances from a .csv file. The completion of this procedure allows these totals to be printed on the employees' pay stubs, if desired. This feature is not mandatory. School districts and systems electing to track leave information via a Microsoft® Excel spreadsheet or by other means may be able to take advantage of this import capability to save the time required by the manual entry of employees' leave usage during each payroll cycle.

To suppress printing leave on checks/direct deposits: Set the **Print Leave on Checks** option to 'N' on the *Payroll Control Information* screen. This will allow leave data to be imported into PCGenesis without having the data appear on employees' pay statements. Refer to the *Payroll System Operations Guide, Section I: Special Functions, Topic 3: Tax Tables/Withholding/Control Information Processing* for additional information.

Personnel Phase: This phase consists primarily of creating and maintaining the *Leave of Absence File*. The first step is to *Create the Original Leave of Absence File*. If leave data has been keyed into payroll as described above, the original *Leave of Absence File* will be created using leave data from payroll. If leave data has NOT been keyed into payroll, the original *Leave of Absence File* will be created as an empty file. Refer to *Topic 3: Creating the Original Leave of Absence File* for instructions on creating this file. The *Create Original Leave of Absence File* process deletes all prior leave entries and always recreates the file *each and every time this procedure is run*.

The table below illustrates how the 28 leave types in the *Leave of Absence File* are extracted for CPI processing into the four valid CPI leave categories.

For school districts and systems that use the PCGenesis Leave System: The *Leave of Absence File* will be created with payroll leave totals from all Sick Leave, Sick Bank Leave, Personal Leave, Vacation Leave, Unpaid Leave, Staff Development, and Other Leave used by employees for the CPI reporting period.

The payroll leave data is converted to *Leave of Absence File* data as follows:

- Payroll Sick Leave will be created in the *Leave of Absence File* with Absence Type **SLST**, Sick Leave – Standard.
- Payroll Personal Leave will be created with Absence Type **PER1**, Personal Leave.
- Payroll Vacation Leave will be created with Absence Type **VAC1**, Vacation Pay.
- Payroll Unpaid Leave will be created with Absence Type **SLWP**, Sick Leave w/o Pay.
- Payroll Other Leave will be created with Absence Type **ZOT1**, Other Approved Leave.
- Payroll Staff Development Leave will be created with Absence Type **STAF**, Staff Development.
- Payroll Sick Bank Taken Leave will be created with Absence Type **SLST**, Sick Leave – Standard.
- **NOTE:** Only school districts using the *Enhanced Substitute Pay and Employee Leave System* will automatically include Parental Leave (**PARE**) and COVID Leave (**COVI**) on the *Leave of Absence File*. All other school districts must enter Parental Leave (**PARE**) and/or COVID Leave (**COVI**) manually by keying the leave for each employee using the procedures provided in *Topic 4: Leave of Absence File Maintenance*.

For school districts and systems that are not using the PCGenesis Leave System: If PCGenesis Leave System is not being used, an empty *Leave of Absence File* is created. The leave of absence data must be created manually by keying the leave for each employee using the procedures provided in *Topic 4: Leave of Absence File Maintenance*.

CPI Phase: This phase consists of extracting the leave data from the *Leave of Absence File* into the *CPI Transmission File*. This is accomplished when creating the *CPI Transmission File* for CPI Reporting Cycle 3. Refer to *CPI System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 1: Creating the CPI In-Progress Report and/or the CPI Data Transmission File* for instructions on creating the *CPI Transmission File*.

Leave data is summarized on the ‘D’ Record (Leave Information) on the *CPI Transmission File*. There can be up to five ‘D’ (Leave) Records for each employee. **‘D’ Records are submitted to the Ga DOE for CPI Reporting Cycle 3 ONLY.**

The table below illustrates how the 28 leave types in the *Leave of Absence File* are extracted for CPI processing into the four valid CPI leave categories.

Summary: **Sick, Sick Bank Taken, and Personal** leave data from payroll will be reported in CPI as **SICK**. **Other** and **Unpaid Leave** from payroll will be reported in CPI as **OTHER**. **Vacation** data from payroll will be reported in CPI as **VACATION**. **Staff Development** leave data from payroll will be reported in CPI as **STAFF**. **Parental** leave and **COVID** leave can be extracted from the *Leave History File* for users of the *Enhanced Substitute Pay and Employee Leave System* and reported in CPI as **PARE** and **COVI** respectively.

The table below illustrates how leave data entered into payroll is converted to leave data in the personnel *Leave of Absence File*, which is then converted to leave data in the *CPI Transmission File*.

Payroll Category	Leave of Absence File Category	CPI Cycle '3' Transmission File Category
	BERE – Bereavement/Relig. Leave	Sick Leave
COVID Leave Type/Reason code extracted from the <i>Leave History File</i>	COVI – COVID Leave	Covid Leave
	FAM1 – Fam/Med Paid using Sk Lv	Sick Leave
	FAM2 – Family/Med Leave w/o Pay	Other
	FT01 – Field Trip	Other
	FT02 – Field Trip w/o Pay	Other
	JURY – Jury Duty	Other
	MIL1 – Military Leave	Other
Parental Leave Type/Reason code extracted from the <i>Leave History File</i>	PARE – Parental Leave	Parental Leave
Personal	PER1 – Personal Leave	Sick Leave
	PER2 – Personal Leave w/o Pay	Other
	PROF – Professional Dev/Planning	Staff Development
	SBCC – Sk Bk Cont frm Exc Cryovr	Other
	SBCS – Sk Bk Cont frm Stnd Quota	Other
	SBLC – Sk Bk Leav frm Exc Cryovr	Other
	SBLS – Sk Bk Leav frm Stnd Quota	Sick Leave
	SBUS – School Business	Other
	SLEC – Sick Leave, Excess Cryovr	Sick Leave
Sick Leave	SLST – Sick Leave – Standard	Sick Leave

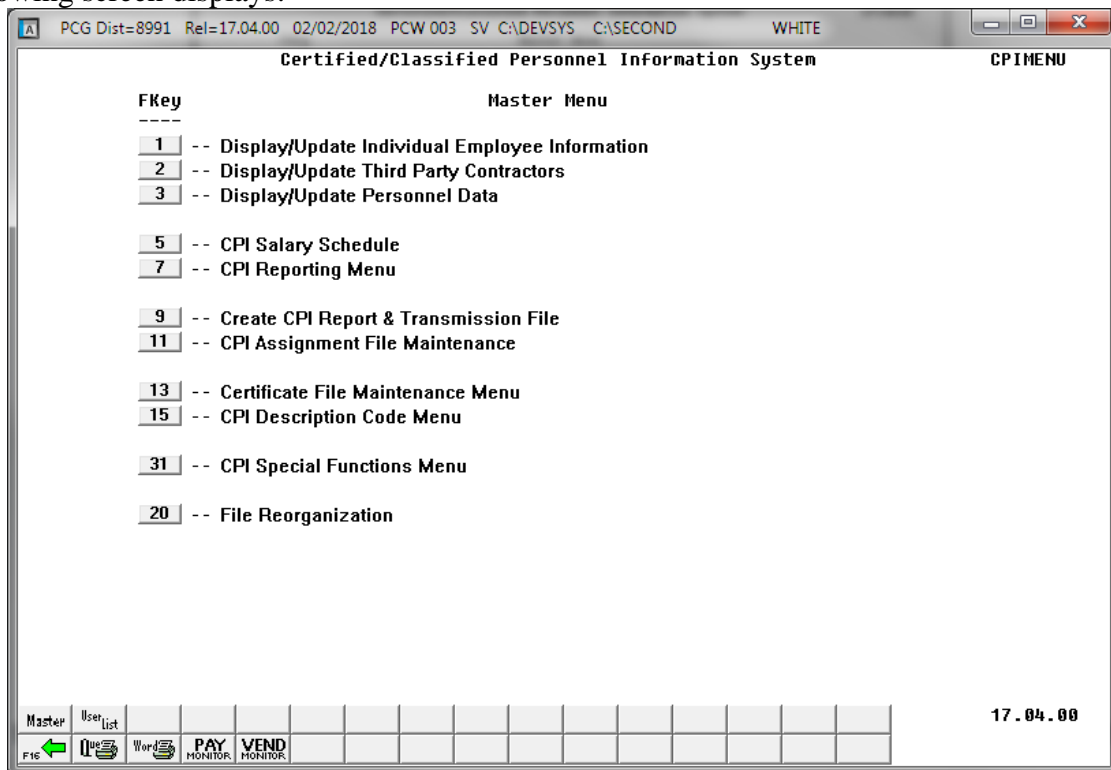
Payroll Category	Leave of Absence File Category	CPI Cycle '3' Transmission File Category
Sick Bank Taken	SLST – Sick Leave – Standard	Sick Leave
Unpaid Leave	SLWP – Sick Leave w/o Pay	Other
Staff Development	STAF – Staff Development	Staff Development
	SUBP – Subpoena	Other
Vacation	VAC1 – Vacation Pay	Vacation
	VAC2 – Vacation w/o Pay	Other
	WRC1 – Wrk Comp Paid using Sk Lv	Sick Leave
	WRC2 – Wrk Comp w/o Pay frm Schl	Other
Other	ZOT1 – Other Approved Leave	Other
	ZOT2 – Other Leave w/o Pay	Other

Topic 1: Creating the CPI In-Progress Report and/or the CPI Data Transmission File

1A. CPI In-Progress Report ONLY

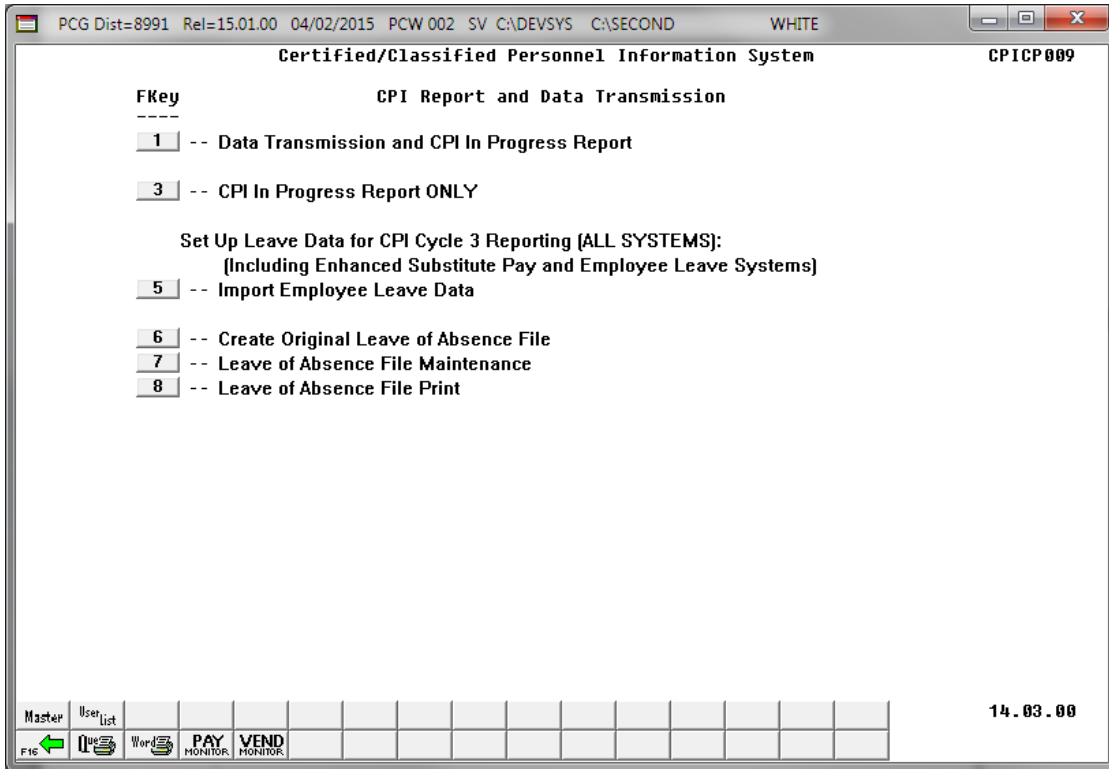
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 4 (F4 - Certified/Classified Personnel Information System).

The following screen displays:



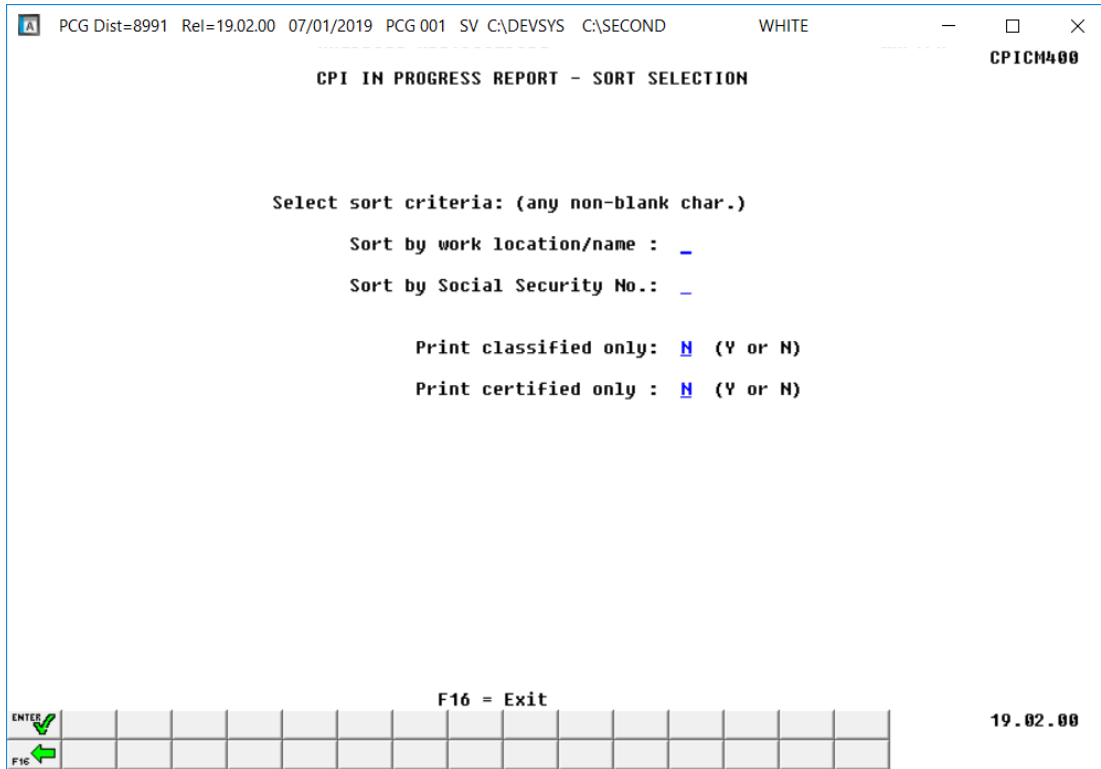
Step	Action
2	Select 9 (F9 - Create CPI Report and Transmission File).


The following screen displays:









Step	Action
3	Select 3 (F3 - CPI In Progress Report ONLY).

The following screen displays:



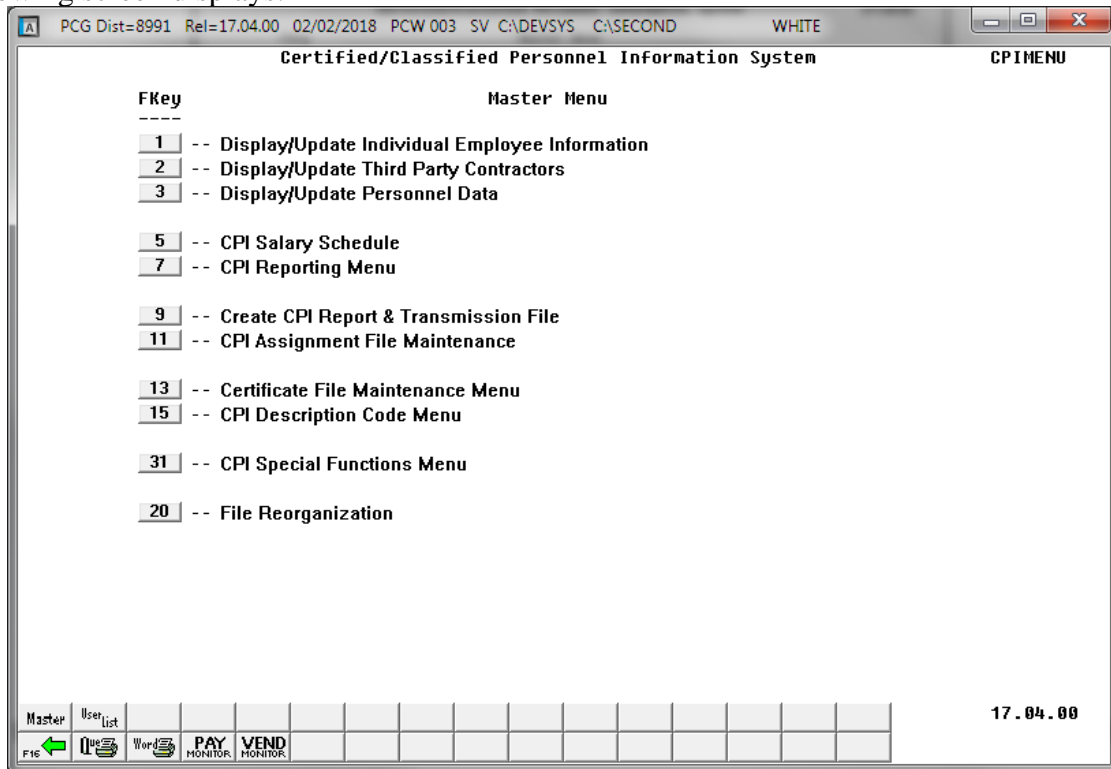
Step	Action
4	Enter Y (Yes) in the Sort by Work Location/Name <u>or</u> the Sort by Social Security No. (Sort by Social Security Number) field to define the sort order.
5	<p>To print all CPI employees: Enter N (No) in the Print classified only <u>and</u> the Print certified only fields to print ALL CPI employees.</p> <p>To print classified employees only: Enter Y (Yes) in the Print classified only and enter N (No) in the Print certified only fields to print only classified employees.</p> <p>To print certified employees only: Enter N (No) in the Print classified only and enter Y (Yes) in the Print certified only fields to print only certified employees.</p>
6	<p>Select  (Enter).</p> <p>“*** Processing Request ***” briefly displays.</p> <p><i>The Certified/Classified Personnel Information System – CPI Report and Data Transmission Menu redisplay.</i></p>

Step	Action
7	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p>Follow the instructions provided in the <i>Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing</i> to create the macro necessary to use the feature where appropriate.</p>
8	<p>Select  (F16 -Exit) to return to the <i>Certified/Classified Personnel Information Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>
9	<p>If there are errors: From the <i>Certified/Classified Personnel Information System Master Menu</i>, select  (F7 - CPI Reporting Menu), then select  (F6 – Print Certified/Classified Employee Error List).</p> <p><i>Where appropriate, use the Section A: Displaying/Updating Individual Employee Information instructions to make corrections to the employees' records. Repeat this procedure beginning at Step 1.</i></p>

1B. Creating the Data Transmission File and the CPI In-Progress Report

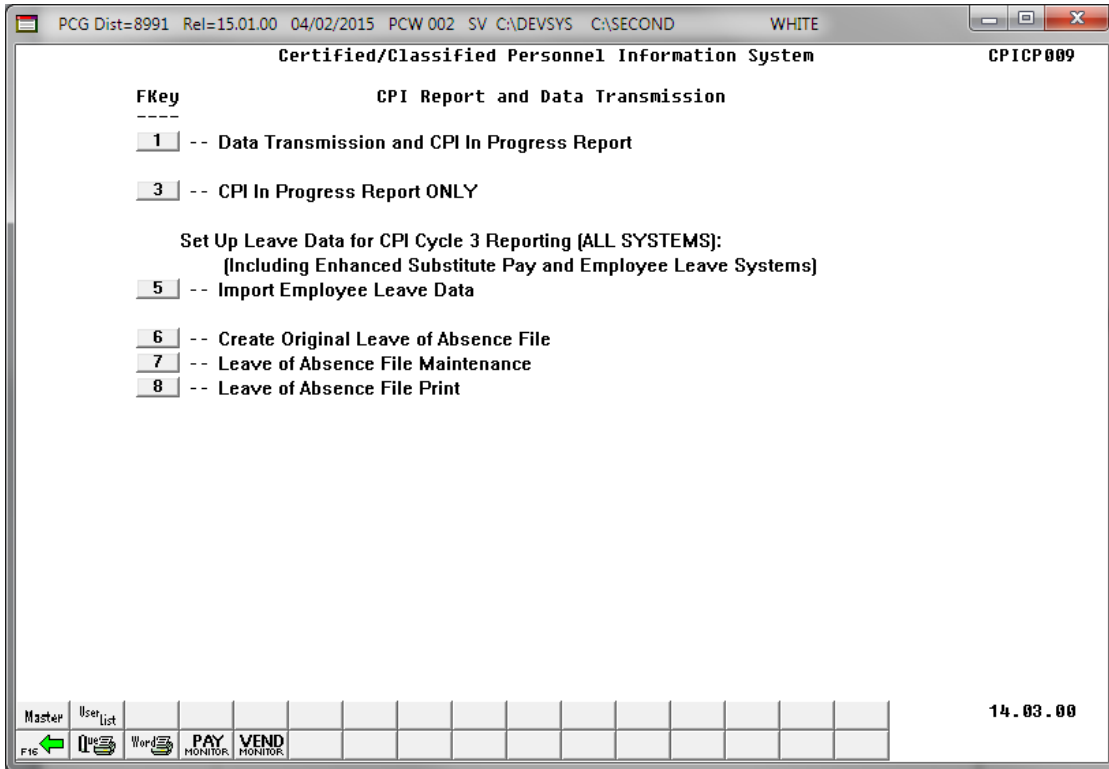
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 4 (F4 - Certified/Classified Personnel Information System).

The following screen displays:



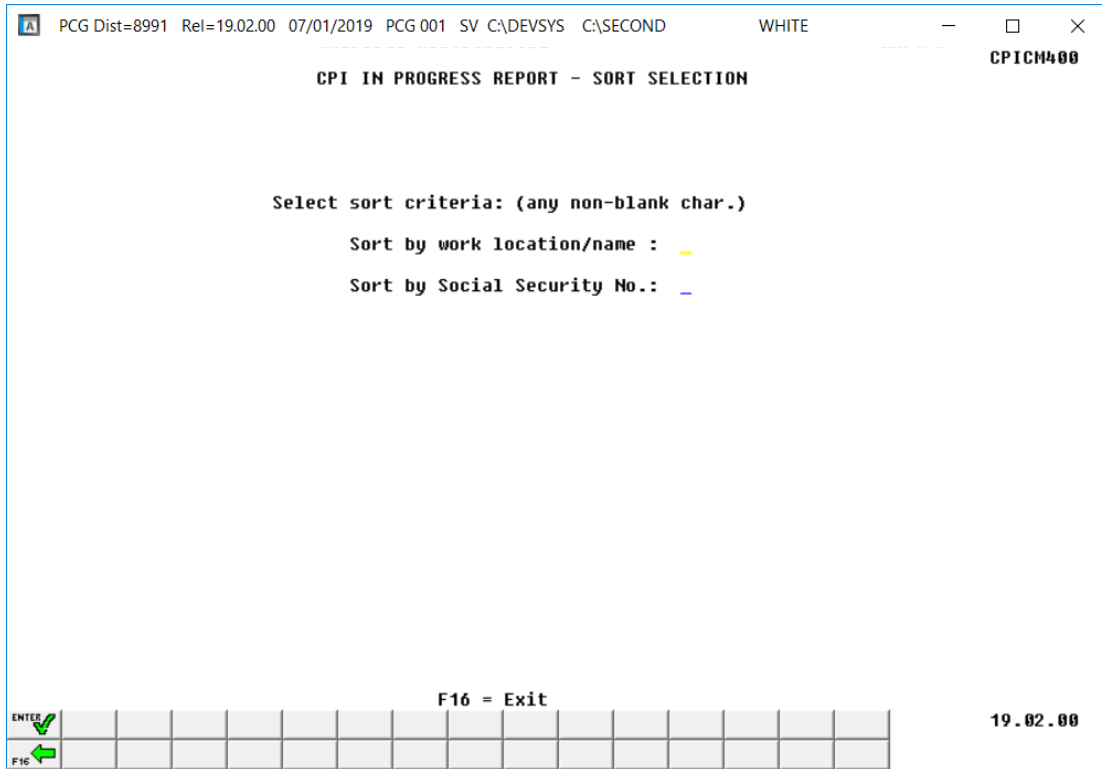
Step	Action
2	Select 9 (F9 - Create CPI Report and Transmission File).


The following screen displays:



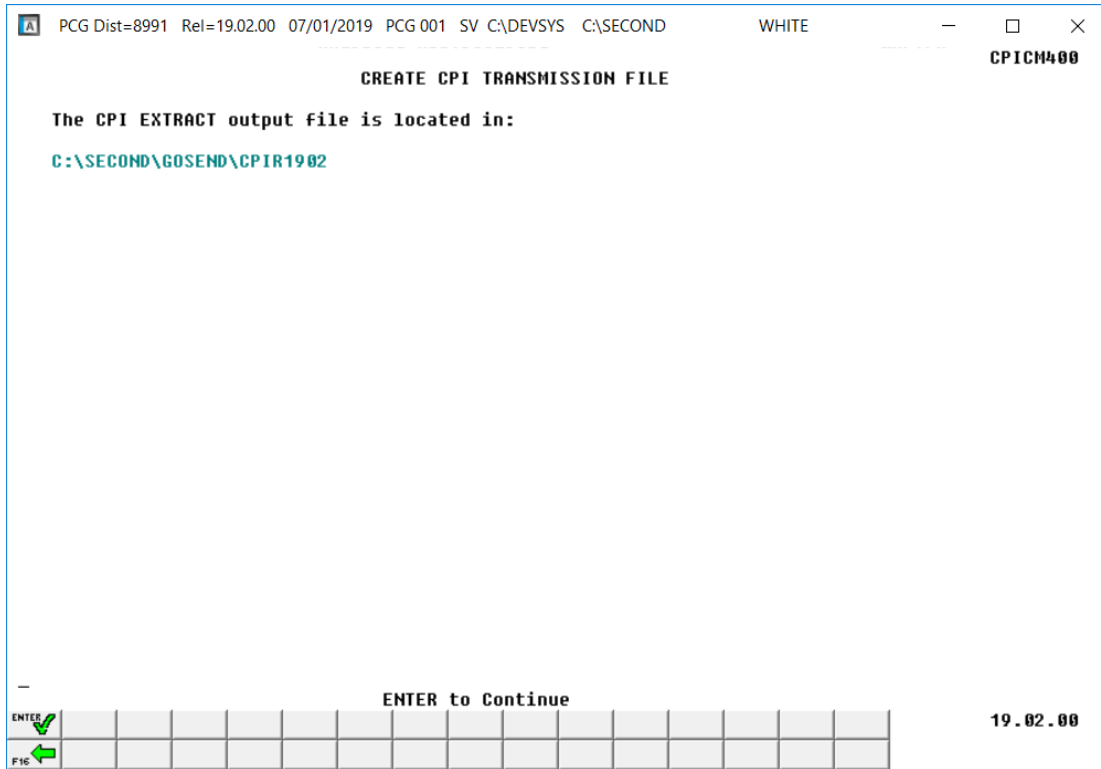
Step	Action
3	Select 1 (F1 - Data Transmission and CPI In Progress Report).






The following screen displays:



Step	Action
4	Enter Y (Yes) in the Sort by Work Location/Name <u>or</u> the Sort by Social Security No. (Sort by Social Security Number) field to define the sort order, and select  (Enter). “*** Processing Request ***” briefly displays.

The following screen displays:



Step	Action
5	<p>Screen-print the <i>Create CPI Transmission File</i> screen and select  (Enter) to continue.</p> <p><i>Enter this information as the upload filename when transmitting the CPI transmission file for processing.</i></p> <p><i>The location of the CPI transmission file is “K:\SECOND\GOSEND”. Also note also that filename is dependent on the reporting year and reporting period.</i></p> <p><i>The Certified/Classified Personnel Information System – CPI Report and Data Transmission Menu redisplay.</i></p>
6	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p>Follow the instructions provided in the <i>Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing</i> to create the macro necessary to use the feature where appropriate.</p>
7	<p>Select  (F16 -Exit) to return to the <i>Certified/Classified Personnel Information Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>

Step	Action
8	<p>If there are errors: From the <i>Certified/Classified Personnel Information System Master Menu</i>, select 7 (F7 - CPI Reporting Menu), then select 6 (F6 – Print Certified/Classified Employee Error List).</p> <p><i>Where appropriate, use the Section A: Displaying/Updating Individual Employee Information instructions to make corrections to the employees’ records. Repeat this procedure beginning at Step 1.</i></p>
9	<p>Proceed to <i>Topic 2: Transmitting the CPI Transmission File to the Georgia Department of Education (GaDOE)</i>.</p>

1B.1. CPI In-Progress Report – Example

The CPI transmission file is submitted to the GaDOE during three CPI reporting periods identified as Period 1, Period 2, and Period 3. The following report is produced for reporting periods 1 and 2.

REPORT ID: CPICM401-DT		CPI DETAIL IN-PROGRESS REPORT										PAGE: 3					
REPORT DATE: 12/03/2018												REPORT TIME: 14:41:00					
899 SMITH CITY BOARD OF EDUCATION		WORK LOCATION: 100 Location 000100										SORT ORDER: LOCATION, LAST NAME					
SSN	EMPNO CERT EMP BASIS	CLASS EMP BASIS	EMPLOYEE NAME CRT C/N	LOC	PRCNT	LEV	JOB	SUBJ	FLD	TYP	CERT SEC FUND	CERT ID CONSOL FUND	PAY STEP	YRS EXP	GHI PART	CONTRACT SALARY	TERMINATION DATE
999087211	087211 1.000	DO7GHTY,	EM7RY C	100	25.0	T7	159	238	798	SRT	(C)	369624 N	L6	27	Y	76617.00	
			C	100	25.0		159	278	798	SRT		N					
			C	100	25.0		159	418	798	SRT		N					
			C	100	25.0		159	458	798	SRT		N					
999089752	089752 1.000	DU6OSE, SE6A	N	100	100.0		410	000			(N)	N			Y	16535.40	
999088362	088362 1.000	EA3LY, MY3L			.0						(C)				N		
999087465	087465 1.000	EG9LESTON, CA9OYLN	C	100	59.0	T5	104	230	808	SRT	(C)	318784 N	L6	32	N	61289.00	
			C	100	13.0		133	920	808	SRT		N					
			C	100	28.0		146	962	881	SRT		N					
999089806	089806 1.000	FA6LK, GR6GORIO	C	100	35.0	T5	103	230	808	SRT	(C)	1209335 N	6	8	Y	47465.00	
			C	100	35.0		103	450	808	SRT		N					
			C	100	30.0		132	920	808	SRT		N					
999087225	087225 1.000	FE4RARA, HE4IBERTO	N	100	100.0		436	000			(N)	1665119 51 N			N	10467.84	03/16/2018
999089170	089170 1.210	GA6NON, SI6ENA	N	100	100.0		435	000			(N)	1449156 N			Y	33006.40	
999088960	088960 1.000	GISLETTE, PA5TY	C	100	50.0	T5	440	999	813	SRS	(C)	204783 N	L6	29	N	61639.00	

The CPI transmission file is submitted to the GaDOE during three CPI reporting periods identified as Period 1, Period 2, and Period 3. Period 3 is generally known as the CPI leave reporting cycle. Since the purpose of period 3 is to report only employee leave data, the CPI Detail In-Progress Report displays the leave totals contained on the CPI transmission file.

REPORT ID: CPICM401-DT		CPI DETAIL IN-PROGRESS REPORT										PAGE: 41				
REPORT DATE: 03/23/2022												REPORT TIME: 13:18:00				
899 SMITH CITY BOARD OF EDUCATION		8013 Location 008013														
SSN	EMPNO CERT EMP BASIS	CLASS EMP BASIS	EMPLOYEE NAME C/U	SICK	STAFF	VAC	OTHER	COVID	PARENT	LEV	PAY STEP	YRS EXP	GHI PART	CONTRACT SALARY	TERMINATION DATE	STRIDE ID
999088935	088935	CH9ATE, 1.000	LO9NNA 000	000	000	005	001	000	(N) 000				N	44693.60		00000000
999087664	087664	LE8NE, CA 1.000	HERIN 004	000	000	004	010	000	(N) 000				Y	44693.60		00000000
999087704	087704	NE7SOM, GE 1.000	7EVIVE 002	000	000	000	004	000	(N) 000				Y	44564.00		00000000
999089184	089184	RESMAN, FR 1.000	ESDINAND 012	000	000	005	007	000	(N) 000				Y	41308.00		00000000
999089232	089232	SC3ELL, CH 1.000	3NIAY 007	000	000	003	010	000	(N) 000				Y	35309.60		00000000
999089573	089573	WE3TERS, RE 1.000	3ONA 002	000	000	004	000	000	(N) 000				Y	84391.20		00000000
999086842	086842	WISLINGHAM, 1.000	SC3TTIE 000	000	000	000	000	000	(N) 000	1725606 T4	E		N		08/02/2019	00000000
GRAND TOTALS				02212	00178	00140	01012	00000	00015							

Topic 2: Import Employee Leave Data

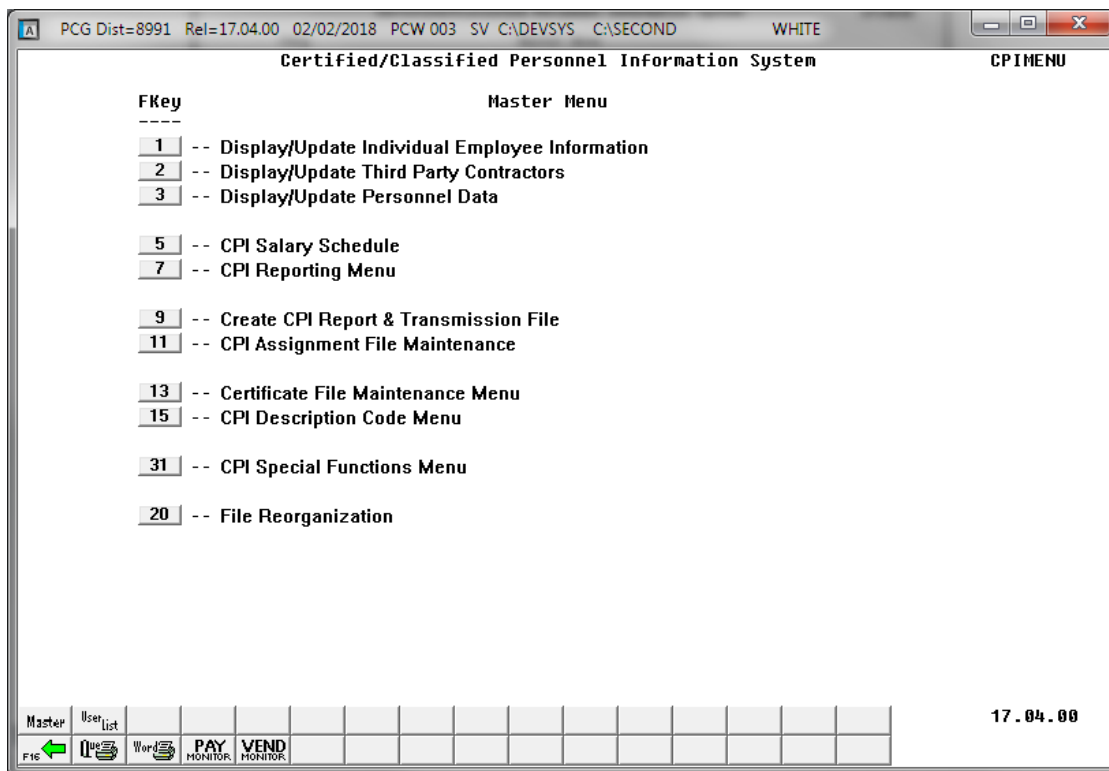
The *Import Employee Leave Data* procedure allows for the upload of current leave, year-to-date leave, and leave balances from a .csv file. The completion of this procedure allows these totals to be printed on the employees' pay stubs, if desired.

This feature is not mandatory. School districts and systems electing to track leave information via a Microsoft® Excel spreadsheet or by other means may be able to take advantage of this import capability to save the time required by the manual entry of employees' leave usage during each payroll cycle.

As with other PCGenesis data imports, this import procedure uses a .csv file format, with one line of data per employee to be updated. The import file must also include a header line identifying the school system ID and the payroll date for the current payroll cycle. The import procedure verifies that each employee's number is valid, and verifies the amounts are consistent, for example, that current leave cannot be greater than year-to-date leave, and that leave balances must be greater than or equal to zero. The import procedure does not, however, verify that all employees are included in the upload, as not all employees have leave. If any errors are found, the data is not loaded, and PCGenesis users are given the option to print the error list at this point in processing.

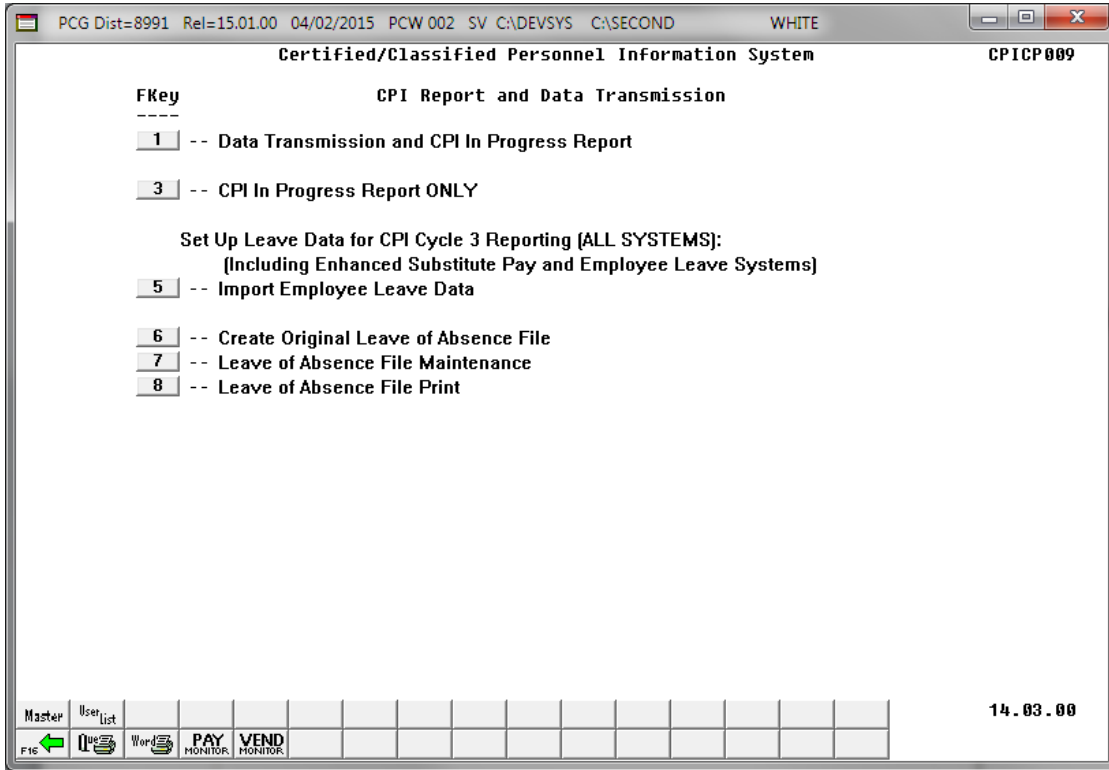
The detailed layout of the comma separated import file is available in section 2A. *.csv File Layout* of this document.

NOTE: If the *Enhanced Substitute Pay and Employee Leave System* is in use, leave updates using this procedure are NOT allowed.



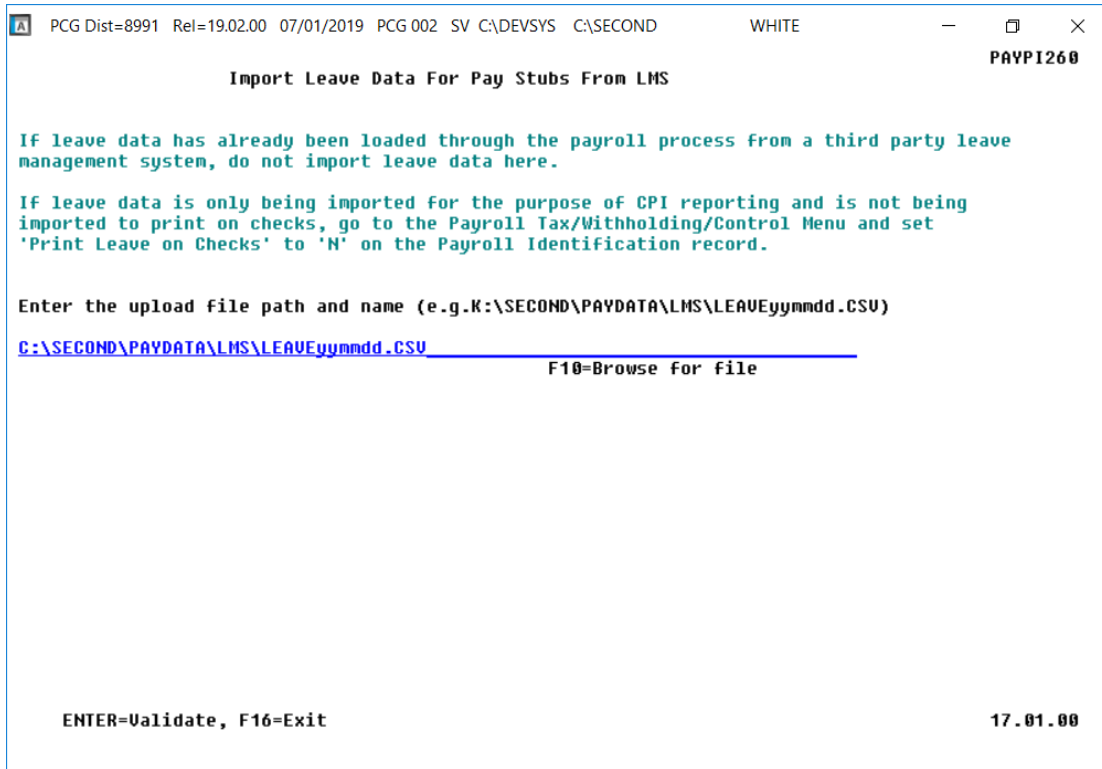
Step	Action
1	Select 9 (F9 - Create CPI Report and Transmission File).

The following screen displays:



Step	Action
2	Select F5 (F5 – Import Employee Leave Data).

The following screen displays:



Step	Action
3	<p>Verify the path and filename have defaulted correctly as K:\SECOND\PAYDATA\LMS\ymmdd.csv, and enter the correct path and filename in the Enter the upload file path and name field , or select F10 (to Browse for file).</p> <p>Select Enter <u>twice</u>.</p> <p><i>If the filename entered is incorrect, the “Unable to open input Leave Import File. Check file name and path.” message will be displayed. In this instance, return to Step 3 to enter the correct information.</i></p>

The following screen displays if there are no errors:

```

PCG Dist=8991 Rel=13.02.00 07/24/2013 PCW 001 SV C:\DEVSYS C:\SECOND WHITE
PAYPI260
Import Leave Data For Pay Stubs From LMS

If leave data has already been loaded through the payroll process from a third party leave
management system, do not import leave data here.

If leave data is only being imported for the purpose of CPI reporting and is not being
imported to print on checks, go to the Payroll Tax/Withholding/Control Menu and set
'Print Leave on Checks' to 'N' on the Payroll Identification record.

Enter the upload file path and name (e.g.K:\SECOND\PAYDATA\LMS\LEAVEymmdd.CSU)
C:\EXPORT\LEGACY\LEAVEIMPORT.CSU
*** IMPORT FILE SUCCESSFULLY LOADED ***

Enter to Continue 12.03.00
    
```

The following screen displays if there are errors:

```

PCG Dist=8991 Rel=13.02.00 07/24/2013 PCW 001 SV C:\DEVSYS C:\SECOND WHITE
PAYPI260
Import Leave Data For Pay Stubs From LMS

If leave data has already been loaded through the payroll process from a third party leave
management system, do not import leave data here.

If leave data is only being imported for the purpose of CPI reporting and is not being
imported to print on checks, go to the Payroll Tax/Withholding/Control Menu and set
'Print Leave on Checks' to 'N' on the Payroll Identification record.

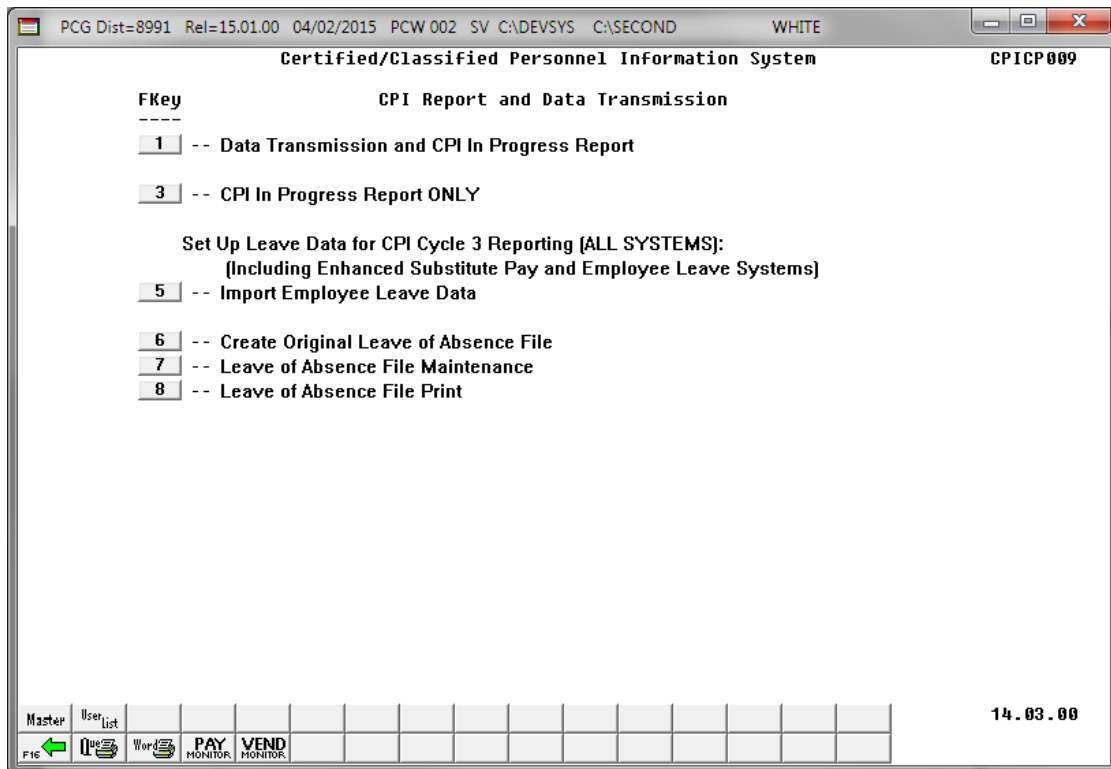
Enter the upload file path and name (e.g.K:\SECOND\PAYDATA\LMS\LEAVEymmdd.CSU)
C:\PCG\LUIMPORT.CSU
*** ERRORS FOUND - CSU File cannot be loaded ***



Empno 000000 not found in personnel file
Line 00002 Import data value too large for field: YTD-VAC
Line 00002 Non-numeric character in numeric field: YTD-OTHER
Line 00002 Non-numeric character in numeric field: YTD-STAFF
Line 00002 Non-numeric character in numeric field: YTD-SCKBK
Line 00002 Import data value too large for field: BAL-SICK
Line 00002 Non-numeric character in numeric field: BAL-PER
Line 00002 Non-numeric character in numeric field: BAL-VAC
Empno 000000 not found in personnel file
Line 00003 Import data value too large for field: YTD-VAC
Too many errors to display. Print report for complete list.

F12 to print error report. F16 to exit without report 12.03.00
    
```

Step	Action
4	If there are errors: Review the error message(s) displayed. Select F12 , and access the PCGenesis Uqueue Print Manager to print the <i>Leave Import Error Report</i> . Using the report, make the appropriate corrections to the .csv file, and return to <i>Step 3</i> to repeat this procedure.
5	If there are no errors: Select Enter to continue. <i>The “* * * Updating Leave Totals * * *” message will be briefly displayed.</i>

The following screen displays:



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

2A. .csv File Layout

- Each line conforms to the following comma delimited format (.csv). Each line ends with a carriage return and line feed pair. (Line sequential format.)
- Lines without valid record ID codes are ignored. This allows the inclusion of headers and other reference information.
- One line is created for the file header. (This should be the first data line in the file.) More than one header line is an error.

Column	Field Name	Notes
Header Record		
Column A	Record ID	Letter “H” (for header)
Column B	School System ID (LUA Identifier)	4 digits, e.g. 6341
Column C	Leave Cutoff Date	8 digits: CCYYMMDD
Column D	Payroll Date	8 digits: CCYYMMDD
Detail Record		
One line must be included for each employee’s summary data.		
Column A	Record ID	Letter “T” or “S” (for State bucket totals) Letter “L” (for Local bucket totals) (to be implemented in the future)
Column B	Employee Number	6 digits
Column C	Current Sick Leave Usage	-999.99
Column D	Current Personal Leave Usage	-999.99
Column E	Current Vacation Leave Usage	-999.99
Column F	Current Other Leave Usage	-999.99
Column G	Current Leave With Out Pay Usage	-999.99
Column H	Current Staff Development Usage	-999.99
Column I	Current Sick Bank Taken Usage	-999.99
Column J	YTD Sick Leave Usage	999.99
Column K	YTD Personal Leave Usage	999.99
Column L	YTD Vacation Leave Usage	999.99
Column M	YTD Other Leave Usage	999.99
Column N	YTD Leave With Out Pay Usage	999.99
Column O	YTD Staff Development Usage	999.99
Column P	YTD Sick Bank Taken Usage	999.99

Column	Field Name	Notes
Detail Record - Continued		
Column Q	Balance Sick Leave Usage	999.99
Column R	Balance Personal Leave Usage	999.99
Column S	Balance Vacation Leave Usage	999.99
Column T	Balance Other Leave Usage	999.99
Column U	Balance Leave With Out Pay Usage	999.99
Column V	Balance Staff Development Usage	999.99
Column W	Balance Sick Bank Taken Usage	999.99

2B. Leave Import Error Report – Example

```
Run date: 04/06/2015          LEAVE DATA IMPORT ERROR REPORT          Page: 1
Program: FAYPI260            Load File Name: C:\PCG\LEGACYLEAVEIMPORT.CSV

Import Input Lines and Error Messages
-----
T,22222,,,2,3,,,,,,,,,,,,,
Empno 022222 not found in personnel file
T,33333,,,2,2,,,,,,,,,,,,,
Empno 033333 not found in personnel file
T,44444,,,2,,,,,,,,,,,,,
Empno 044444 not found in personnel file
```

Topic 3: Creating the Original Leave of Absence File

*** * * Attention * * ***

Repeating this Process deletes all prior entries.

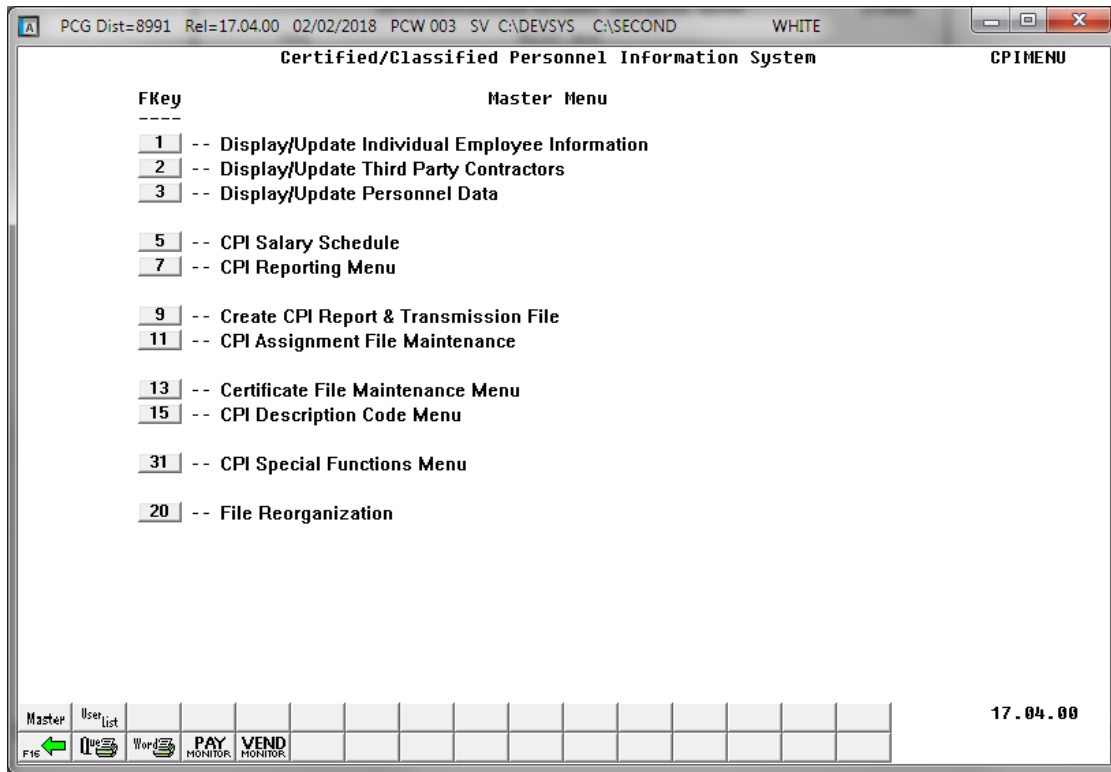
The first step in the leave process is to *Create the Original Leave of Absence File*. If leave data has been keyed into payroll, the original *Leave of Absence File* will be created using leave data from payroll. If leave data has NOT been keyed into payroll, the original *Leave of Absence File* will be created as an empty file. The *Create Original Leave of Absence File* process deletes all prior leave entries and always recreates the file *each and every time this procedure is run*.

For school districts and systems that use the PCGenesis Leave System: The *Leave of Absence File* will be created with payroll leave totals from all Sick Leave, Sick Bank Leave, Personal Leave, Vacation Leave, Unpaid Leave, Other Leave, and Staff Development Leave used by employees for the CPI reporting period.

The payroll leave data is converted to *Leave of Absence File* data as follows:

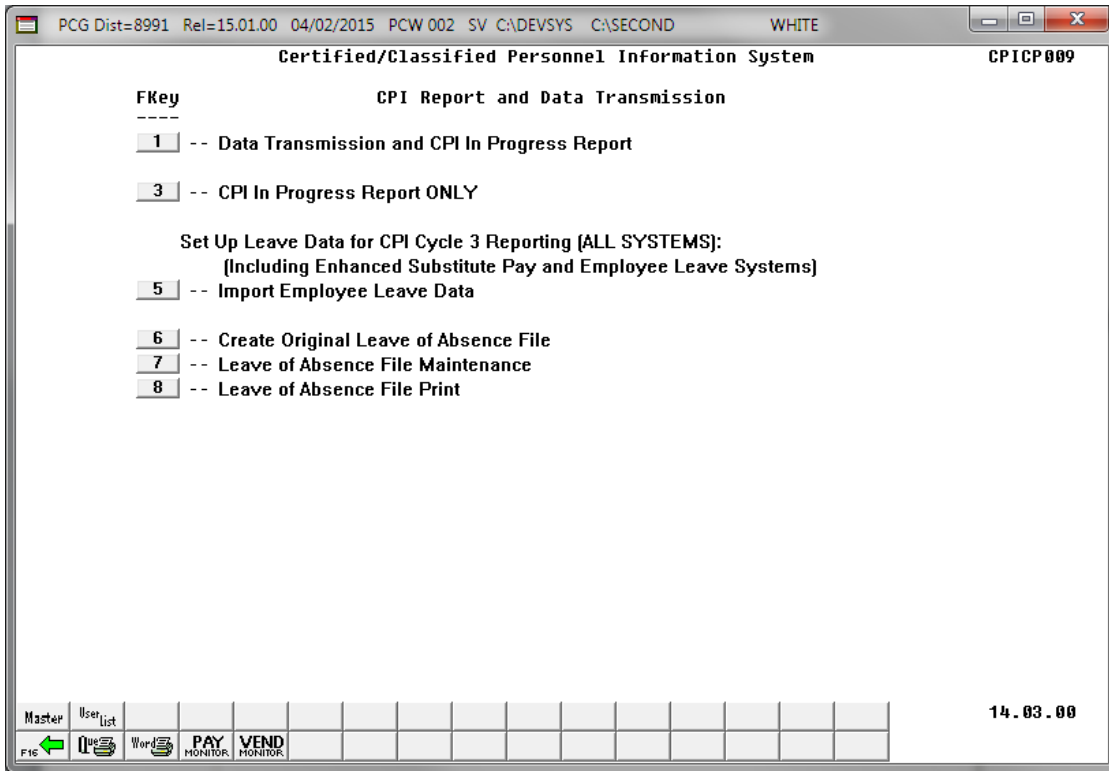
- Payroll Sick Leave will be created in the *Leave of Absence File* with Absence Type **SLST**, Sick Leave – Standard.
- Payroll Personal Leave will be created with Absence Type **PER1**, Personal Leave.
- Payroll Vacation Leave will be created with Absence Type **VAC1**, Vacation Pay.
- Payroll Unpaid Leave will be created with Absence Type **SLWP**, Sick Leave w/o Pay.
- Payroll Other Leave will be created with Absence Type **ZOT1**, Other Approved Leave.
- Payroll Staff Development Leave will be created with Absence Type **STAF**, Staff Development.
- Payroll Sick Bank Taken Leave will be created with Absence Type **SLST**, Sick Leave – Standard.
- **NOTE:** Only school districts using the *Enhanced Substitute Pay and Employee Leave System* will automatically include Parental Leave (**PARE**) and COVID Leave (**COVI**) on the *Leave of Absence File*. All other school districts must enter Parental Leave (**PARE**) and/or COVID Leave (**COVI**) manually by keying the leave for each employee using the procedures provided in *Topic 4: Leave of Absence File Maintenance*.

For school districts and systems that are not using the PCGenesis Leave System: If PCGenesis Leave System is not being used, an empty *Leave of Absence File* is created. The leave of absence data must be created manually by keying the leave for each employee using the procedures provided in *Topic 4: Leave of Absence File Maintenance*.



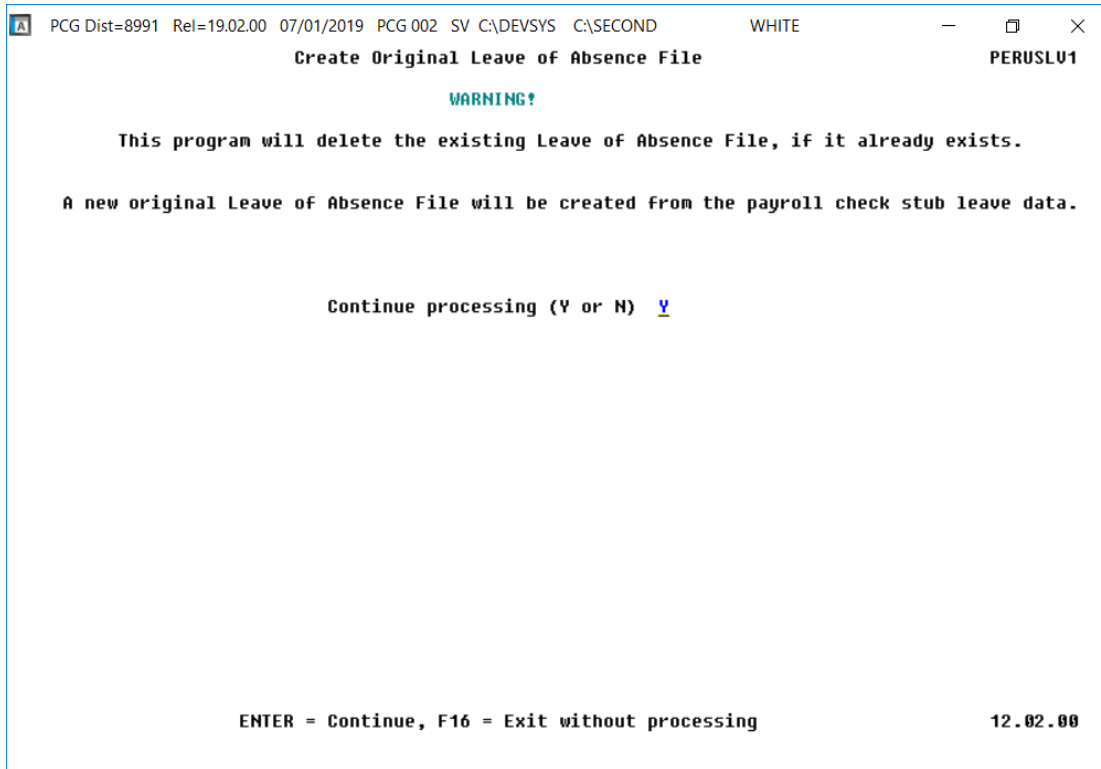
Step	Action
1	Select 9 (F9 - Create CPI Report and Transmission File).

The following screen displays:

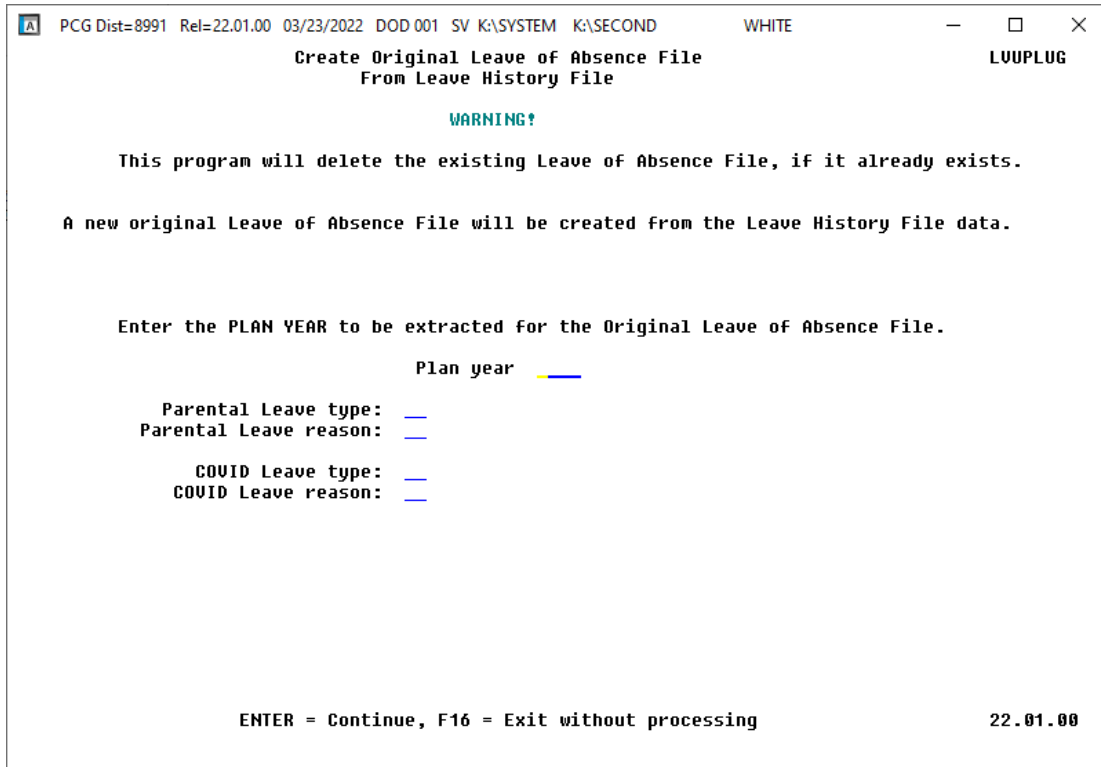


Step	Action
2	Select 6 (F6 - Create Original Leave of Absence File).

For systems using the *Legacy Leave System*, the following screen displays:

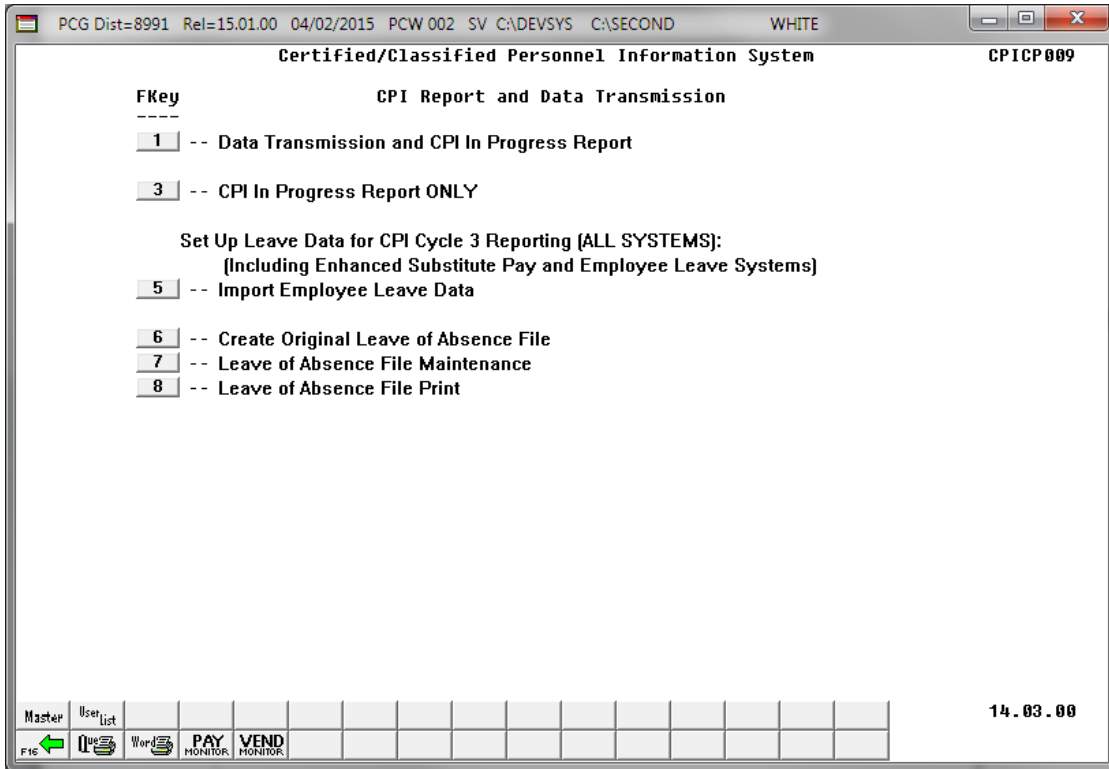




For systems using *Enhanced Substitute Pay and Employee Leave System*, the following screen displays:



Step	Action
3	<p>For school districts and systems that are using the PCGenesis <i>Legacy Leave System</i>: Enter ‘Y’ to continue processing.</p> <p>For school districts and systems that are using the PCGenesis <i>Enhanced Substitute Pay and Employee Leave System</i>:</p> <ul style="list-style-type: none"> • Enter the Plan Year, in CCYY format, of the leave history data to extract for CPI processing. (Required field) • Enter the Parental Leave Type and Parental Leave Reason codes of the leave category that contains parental leave. (Optional field) • Enter the COVID Leave Type and COVID Leave Reason codes of the leave category that contains COVID leave. (Optional field) <p>For school districts and systems that are <u>not</u> using either PCGenesis Leave System: Enter ‘Y’ to continue processing.</p>
4	<p>Select ENTER to continue processing, or select F16 to exit without processing.</p> <p>The <i>Create Original Leave of Absence File</i> process deletes <u>all</u> prior leave entries and always recreates the file <i>each and every time this procedure is run</i>.</p> <p>For school districts and systems that are using the PCGenesis <i>Legacy Leave System</i> or the <i>Enhanced Substitute Pay and Employee Leave System</i>: A leave processing file will automatically be created and will include Sick Leave (SLST), Personal Leave (PER1), Vacation Leave (VAC1), Other Leave (ZOT1), Unpaid Leave (SLWP), and Staff Development (STAF) leave totals where appropriate.</p> <p>NOTE: Only school districts using the <i>Enhanced Substitute Pay and Employee Leave System</i> will automatically include Parental Leave (PARE) and COVID Leave (COVI) on the <i>Leave of Absence File</i>. All other school districts must enter Parental Leave (PARE) and COVID Leave (COVI) manually by keying the leave for each employee using the procedures provided in <i>Topic 4: Leave of Absence File Maintenance</i>.</p> <p>For school districts and systems that are <u>not</u> using either PCGenesis Leave System: If a PCGenesis Leave System is not being used, an empty <i>Leave of Absence File</i> is created. The leave of absence data must be created manually by keying the leave for each employee using the procedures provided in <i>Topic 4: Leave of Absence File Maintenance</i>.</p> <p><i>The Personnel System – Legacy Leave Menu</i> redisplay.</p>

The following screen displays:

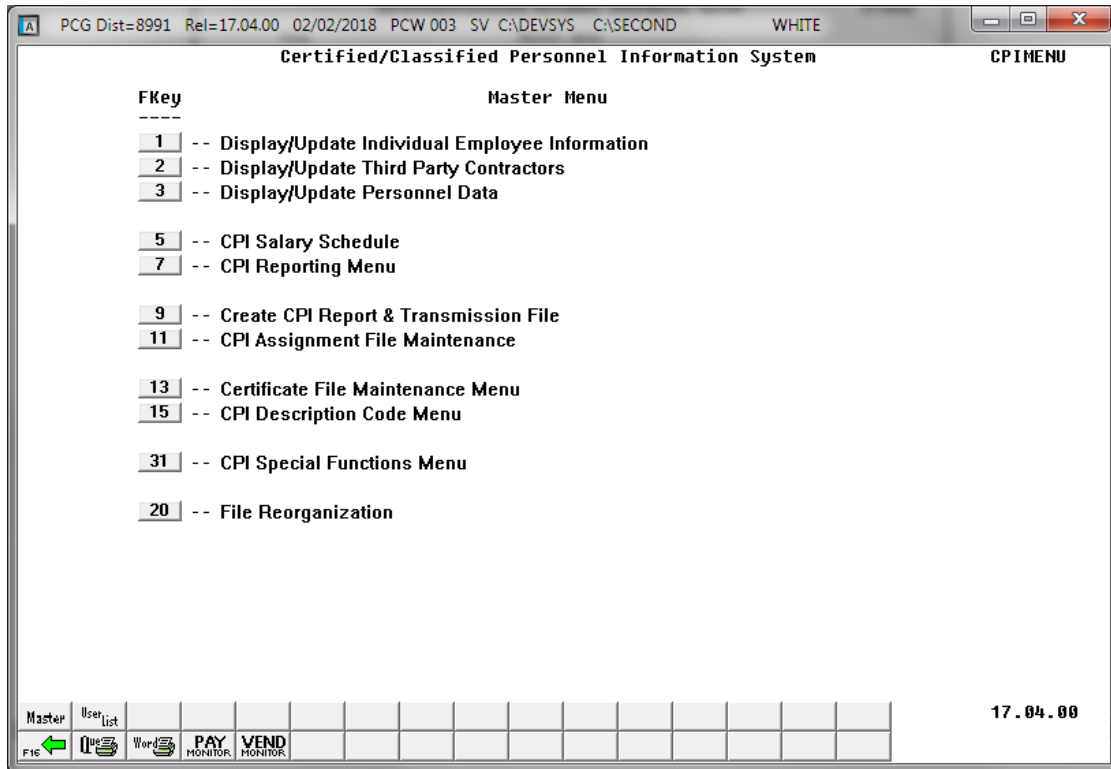


Step	Action
5	Select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .

Topic 4: Leave of Absence File Maintenance

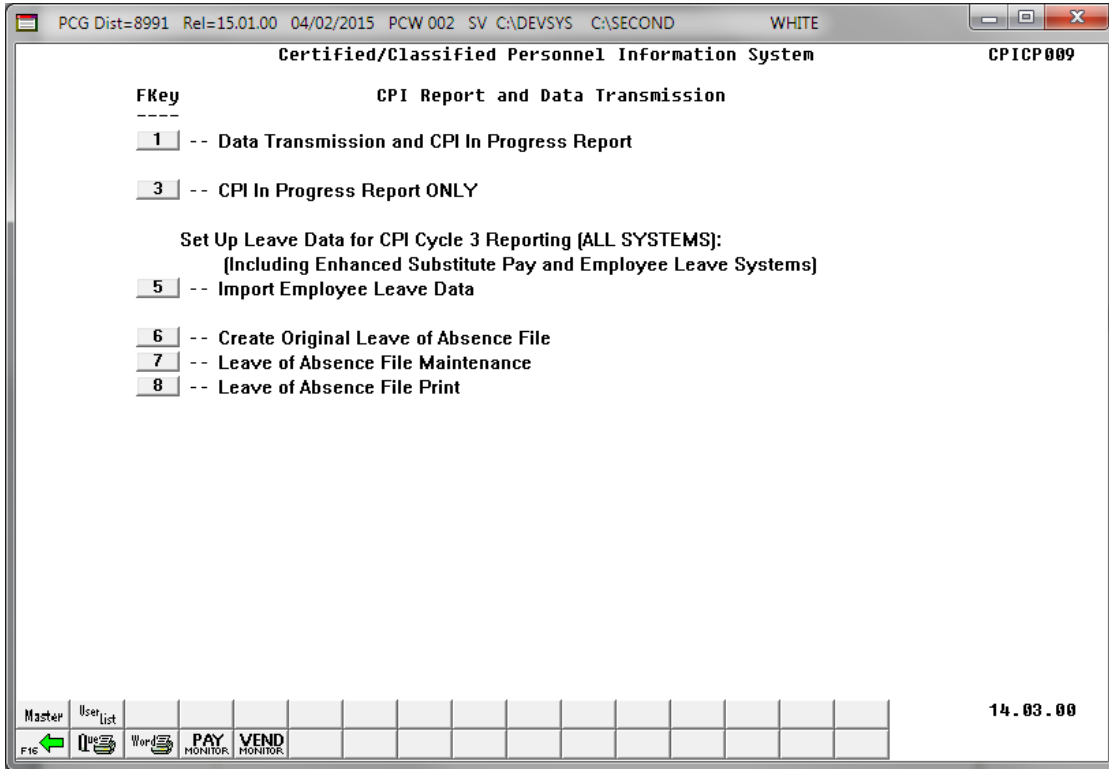
The *Leave of Absence File Maintenance* procedure allows additional leave records to be entered and allows existing leave records to be modified.

Procedure 4A. Add/Update Employee Leave Information



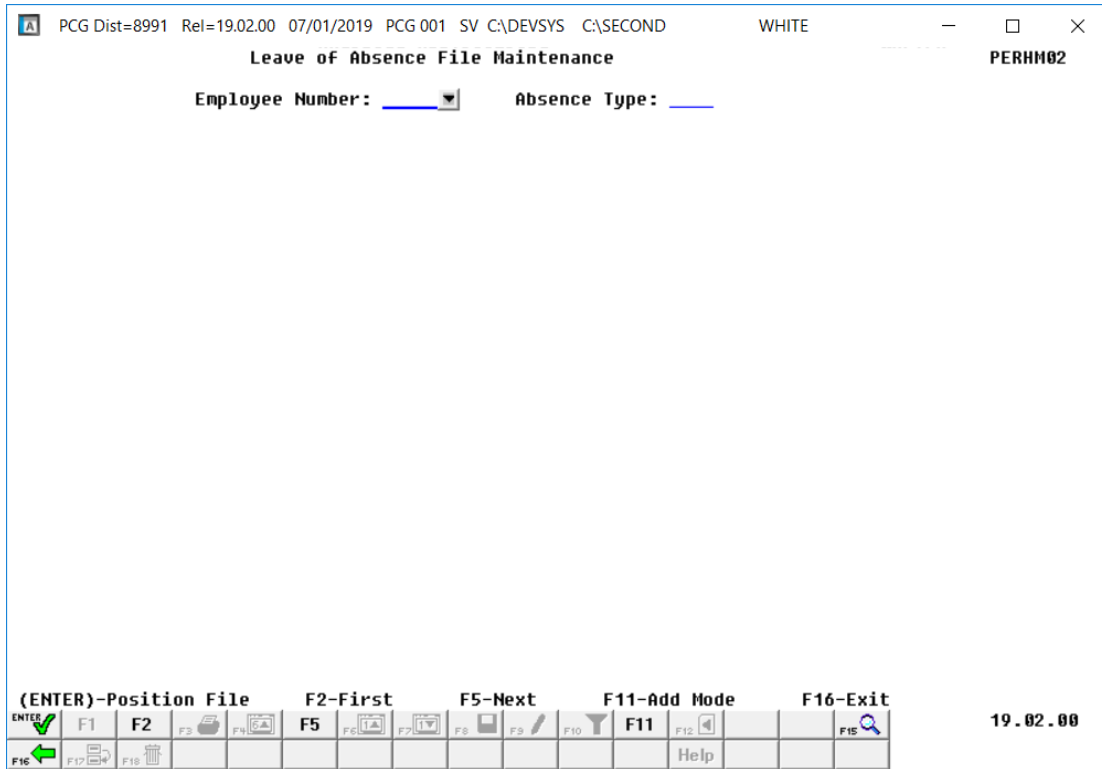
Step	Action
1	Select 9 (F9 - Create CPI Report and Transmission File).





The following screen displays:



Step	Action
2	Select 7 (F7 - Leave of Absence File Maintenance).

The following screen displays:



Step	Action
3	<p>To update an employee’s leave record: Enter the appropriate information in the Employee Number and Absence Type fields and select  (Enter - Position File).</p> <p>To add an employee’s leave record: Select  (F11 - Add Mode).</p> <p><i>Additional options will include  (F2 - View the First Record) and  (F5 - View the Next Record). Select the desired Function key as appropriate.</i></p>

If **F11** (Add Mode) has been selected, the following screen displays:

The screenshot shows a window titled "Leave of Absence File Maintenance" with the user ID "PERHM02". At the top, it displays system information: "PCG Dist=8991 Rel=22.01.00 03/23/2022 DOD 001 SV K:\SYSTEM K:\SECOND WHITE".

Fields for "Employee Number:" and "Absence Type:" are present, with "Total Days:" below. The main area contains two columns of "Absence Type & Description" codes and their meanings, such as BERE = Bereavement/Relig. Leave, COVI = COVID Leave, etc.






At the bottom, a red box highlights the text "** Add Mode **". Below this, a status bar shows "(ENTER)-Add Record" and "F16-Find Mode". A function key bar at the very bottom includes F1 through F15 and a Help key.

If **ENTER** (Position File) has been selected, the following screen displays:




This screenshot shows the same "Leave of Absence File Maintenance" window, but now displaying data for a specific employee. The "Employee Number:" field is populated with "86753" and the name "R06ENTHAL, BA6TON" is shown below it. The "Absence Type:" is "PER1" and "Total Days:" is "3.00".

The list of absence codes and descriptions remains the same as in the previous screenshot.

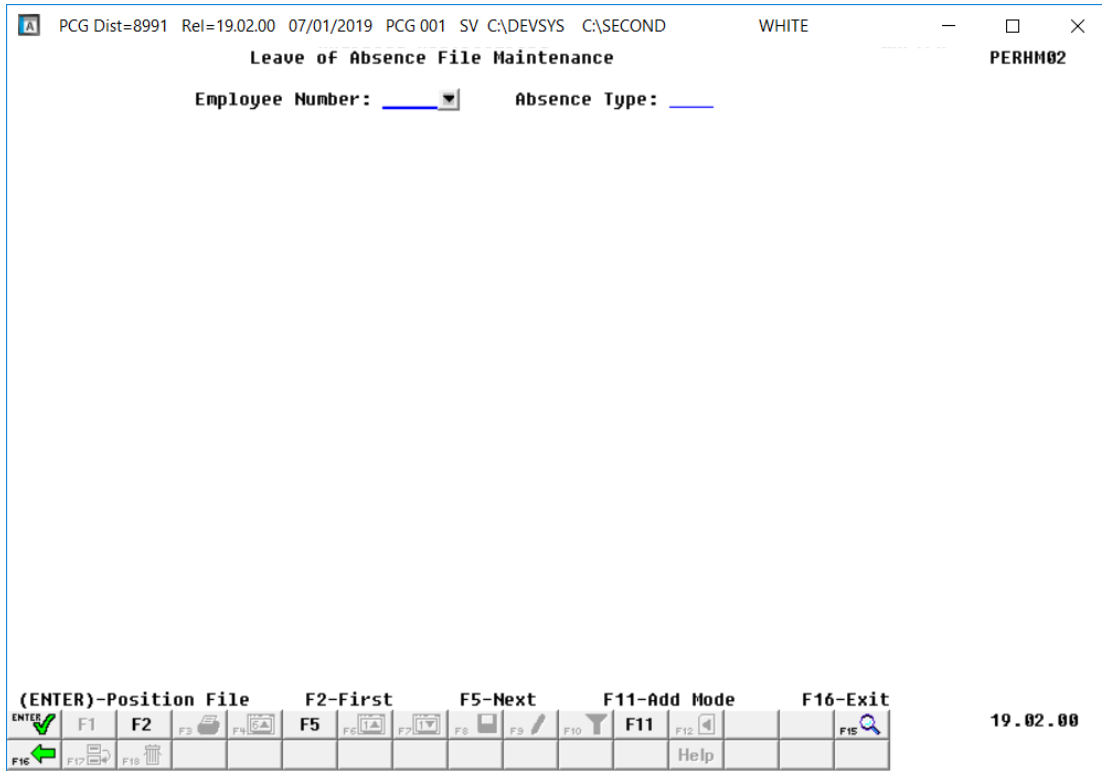
A red box highlights the text "** Display Mode **". The status bar now shows "F16-Find Mode" and "F18-Delete". The function key bar at the bottom is identical to the previous screenshot.


Step	Action
4	<p>To update an employee's leave record: Select  (F9 - Modify) and proceed to Step 5.</p> <p>To add an employee's leave record: Enter the appropriate information in the Employee Number, Absence Type, and Total Days fields and select  (Enter) <u>twice</u>. Proceed to Step 6.</p> <p>Additional options will include  (F16 - Find Mode),  (F2 - View the First Record) and  (F5 - View the Next Record). Select the desired Function key as appropriate.</p>

If F9 (Modify) has been selected, the following screen displays:

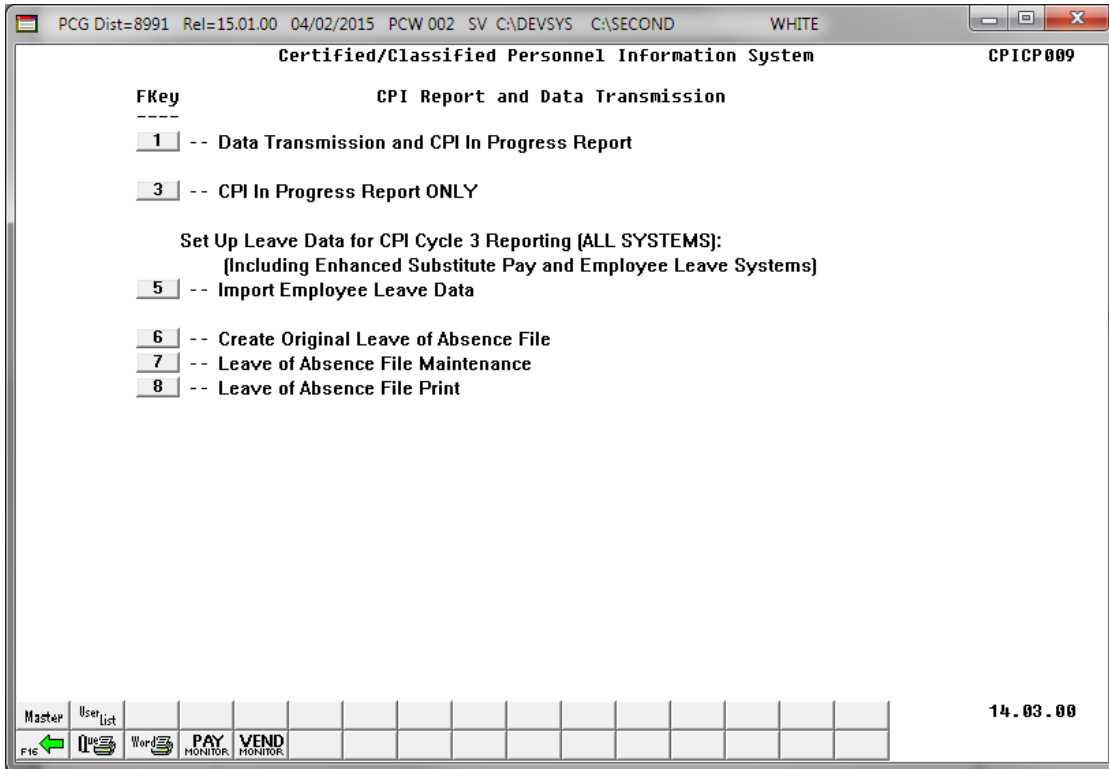
Step	Action
5	<p>To update an employee's leave record: Make the appropriate modifications to the field and select  (Enter - Modify Record).</p> <p>Additional options will include  (F1 - Display Mode). Select the desired Function key as appropriate.</p>
6	<p>Select  (F16 - Find Mode).</p>



The following screen displays:



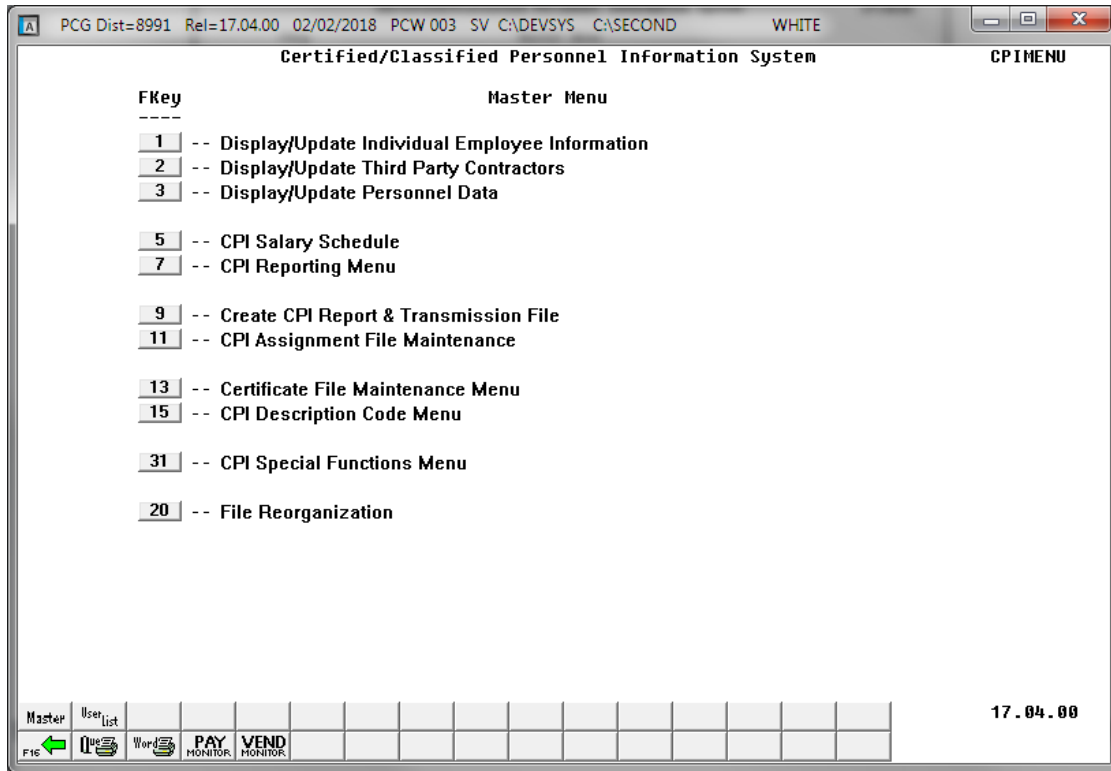
Step	Action
7	Select  (F16 - Exit) to return to the <i>CPI Report and Data Transmission Menu</i> .

The following screen displays:



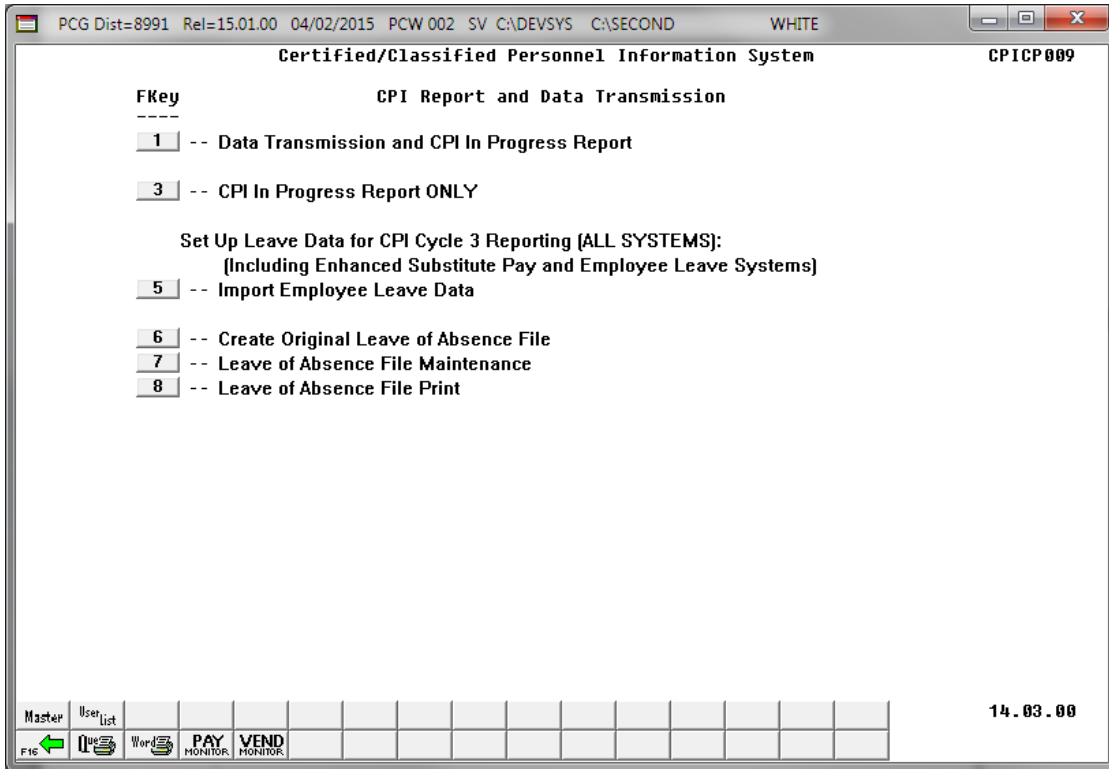
Step	Action
8	Select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .

Procedure 4B. Delete Individual Employee Leave Information



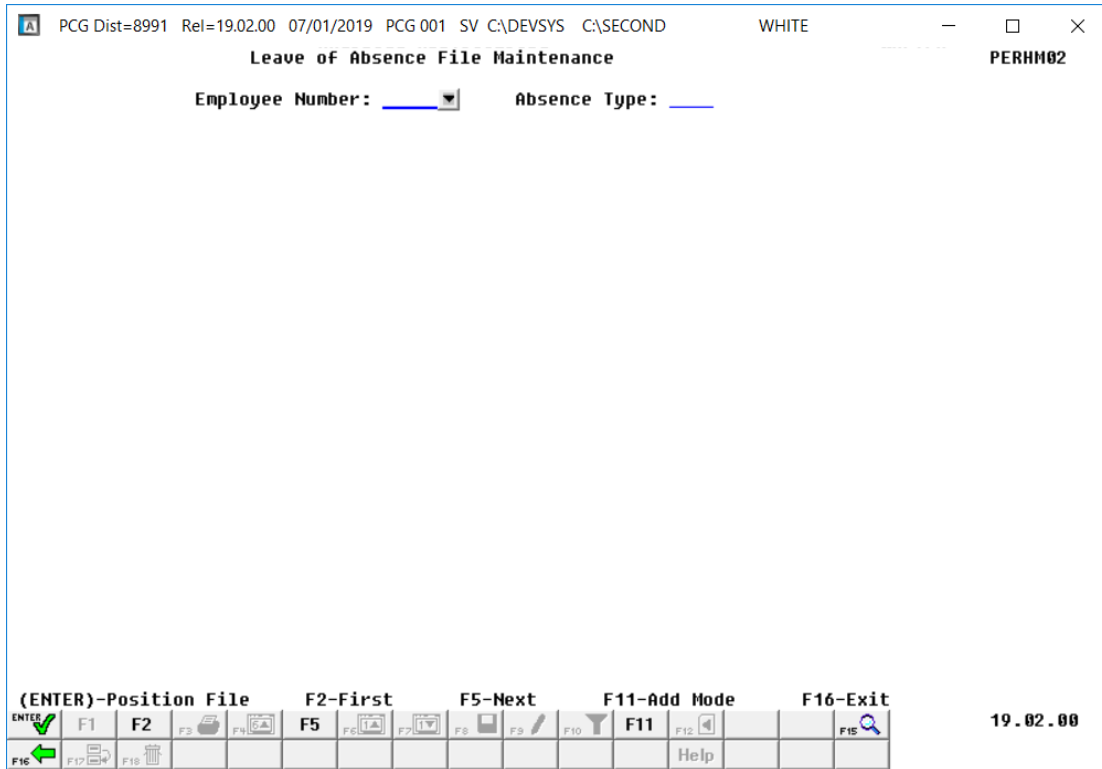
Step	Action
1	Select 9 (F9 - Create CPI Report and Transmission File).


The following screen displays:



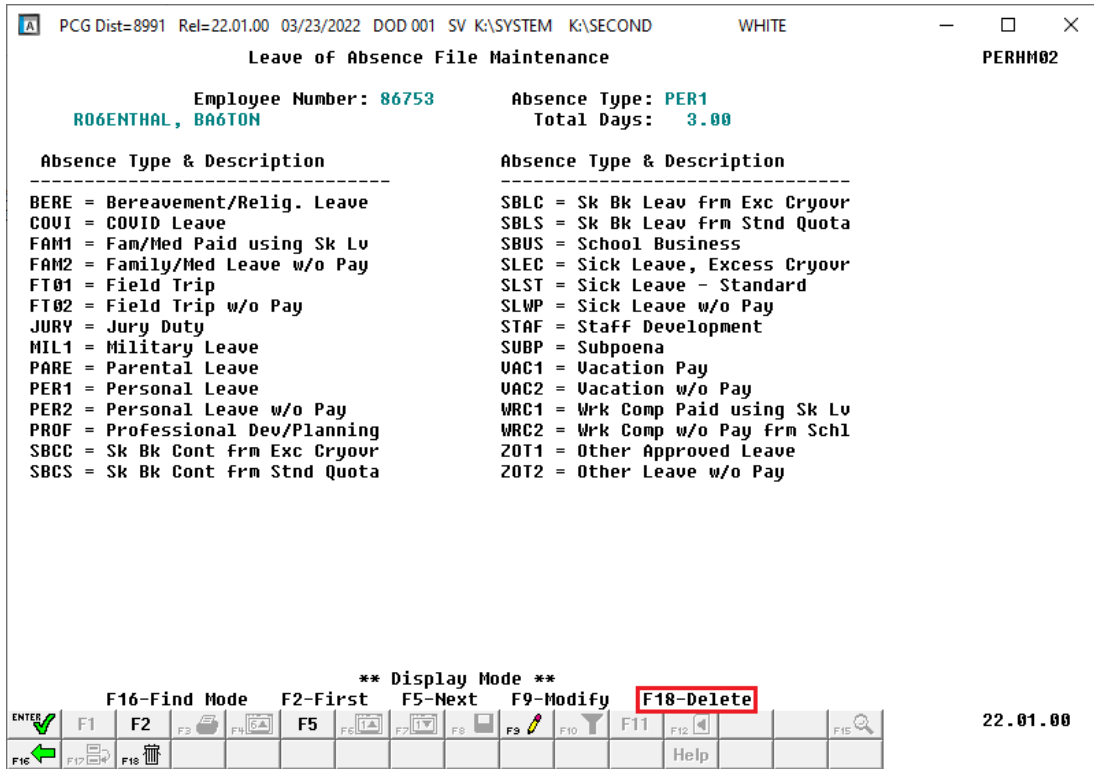
Step	Action
2	Select 7 (F7 - Leave of Absence File Maintenance).


The following screen displays:



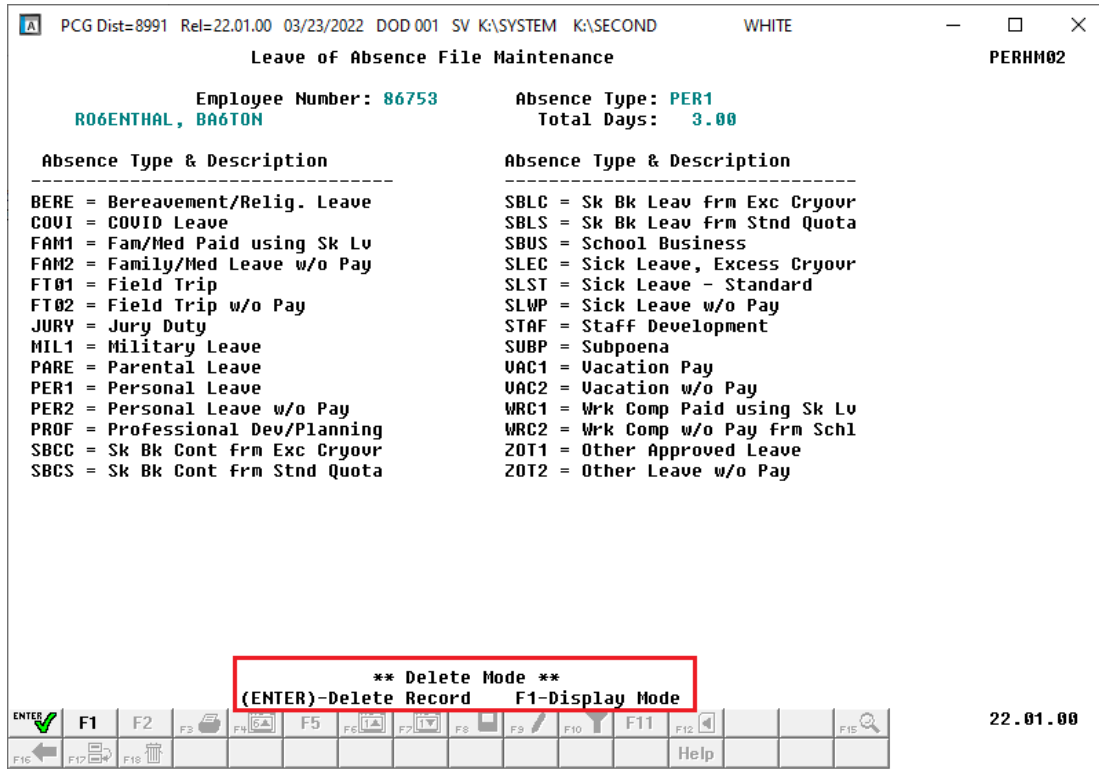
Step	Action
3	Enter the appropriate information in the Employee Number and Absence Type fields and select  (Enter - Position File).


The following screen displays:



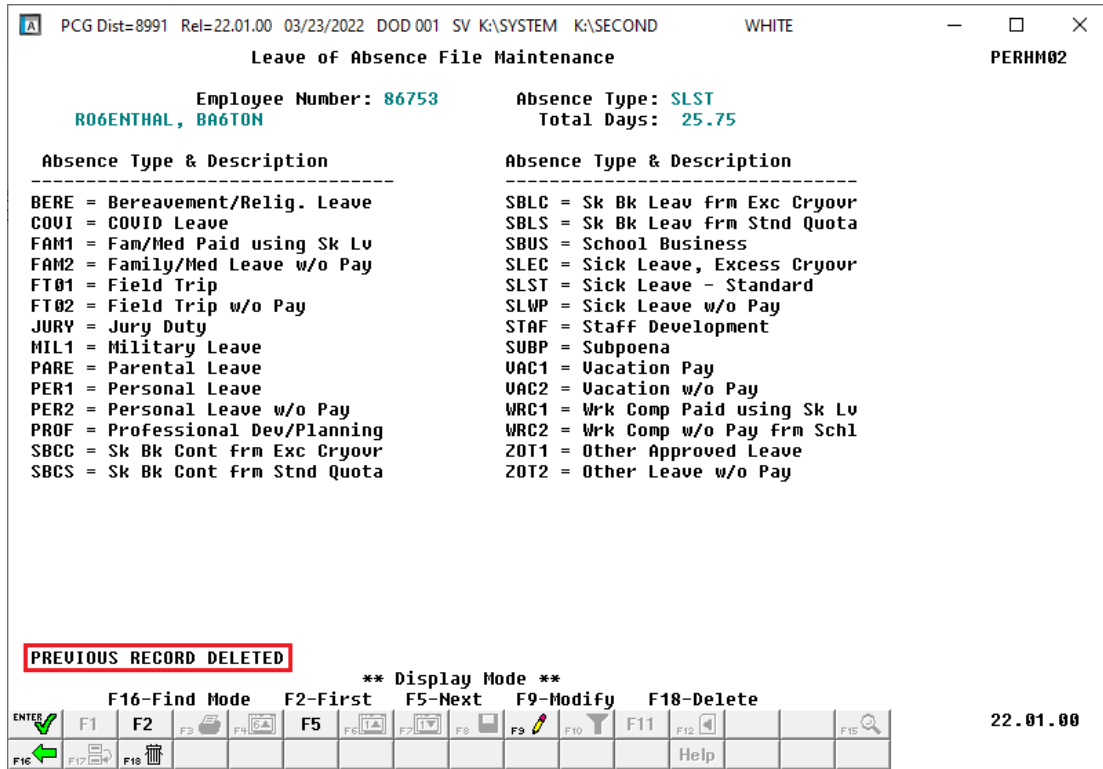
Step	Action
4	Select  (F18 - Delete).

The following screen displays:



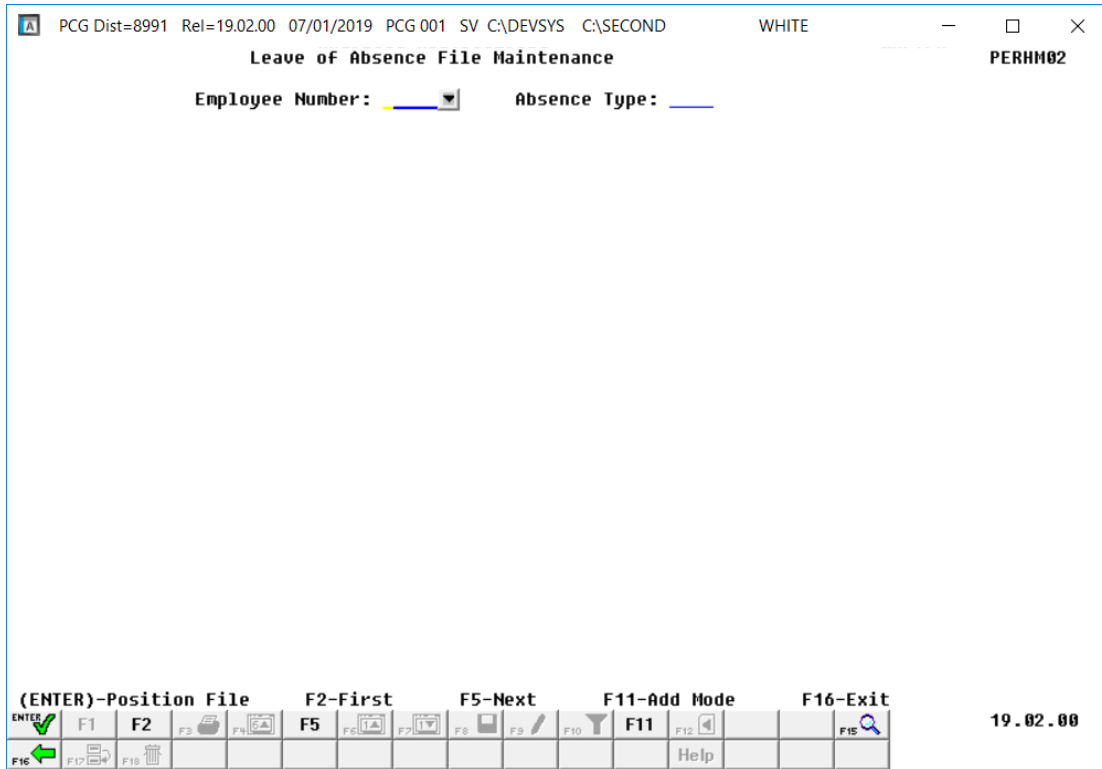
Step	Action
5	Select  (Enter - Delete Record).


The following screen displays:



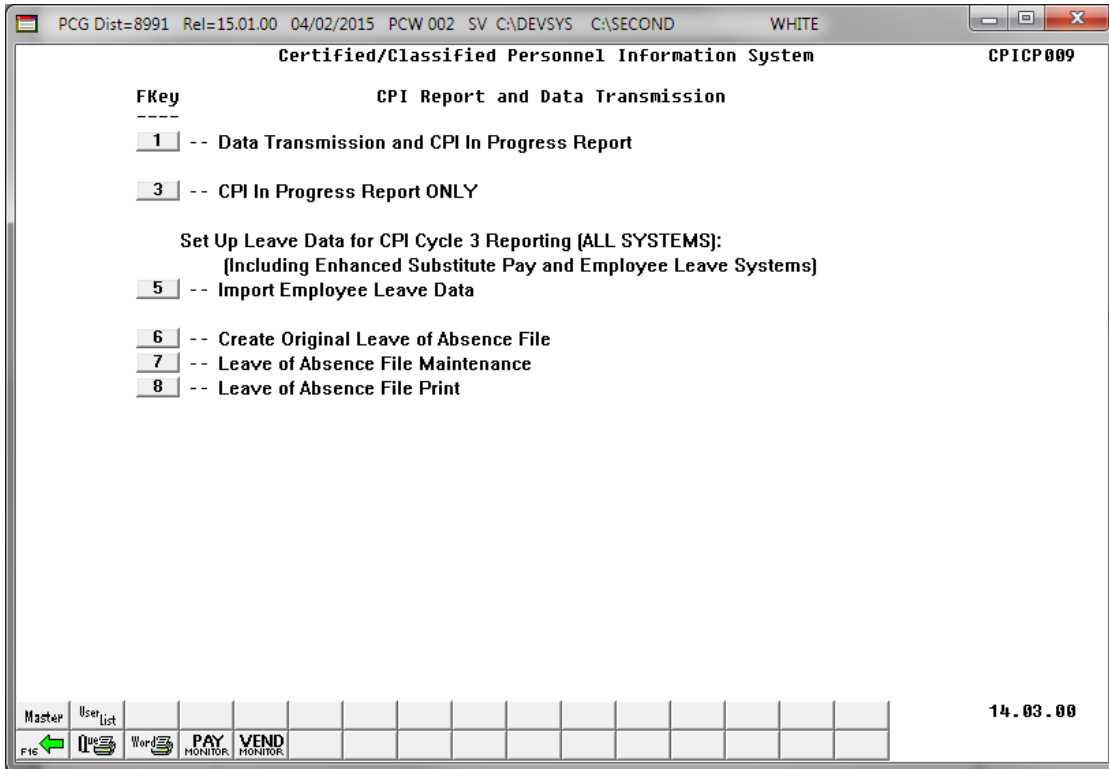
Step	Action
6	Verify "Previous Record Deleted" displays, and select  (F16 - Find Mode).



The following screen displays:



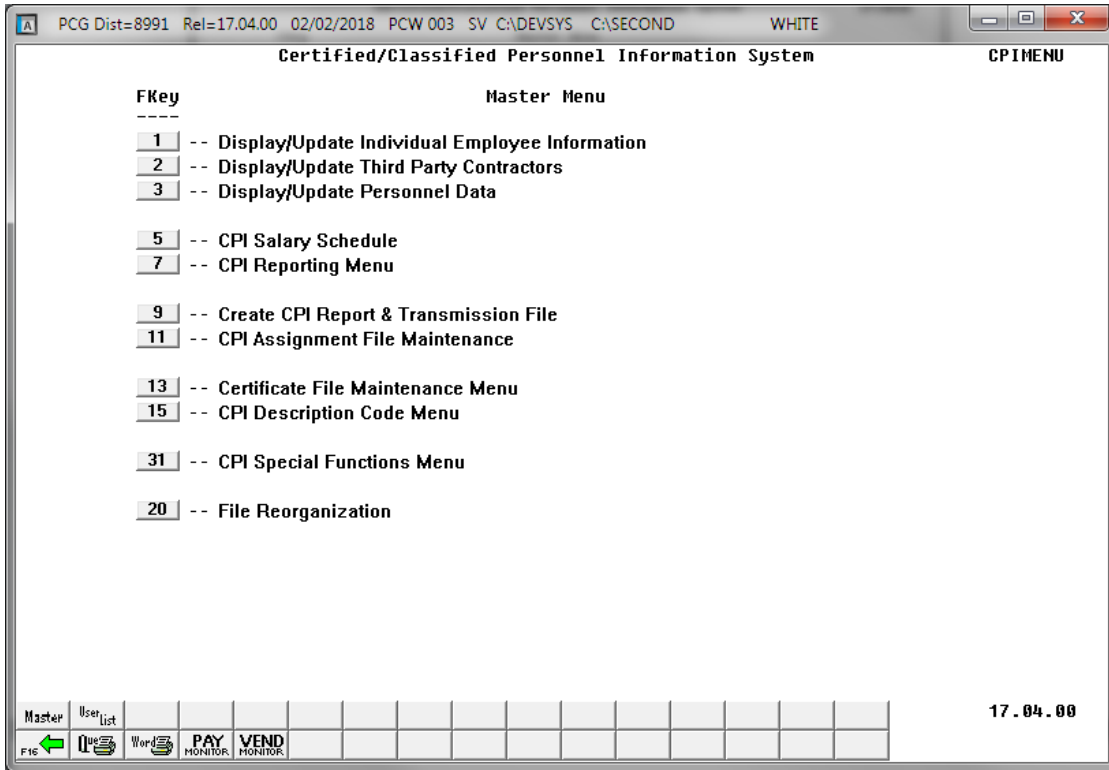
Step	Action
7	Select  (F16 - Exit) to return to the <i>CPI Report and Data Transmission Menu</i> .

The following screen displays:



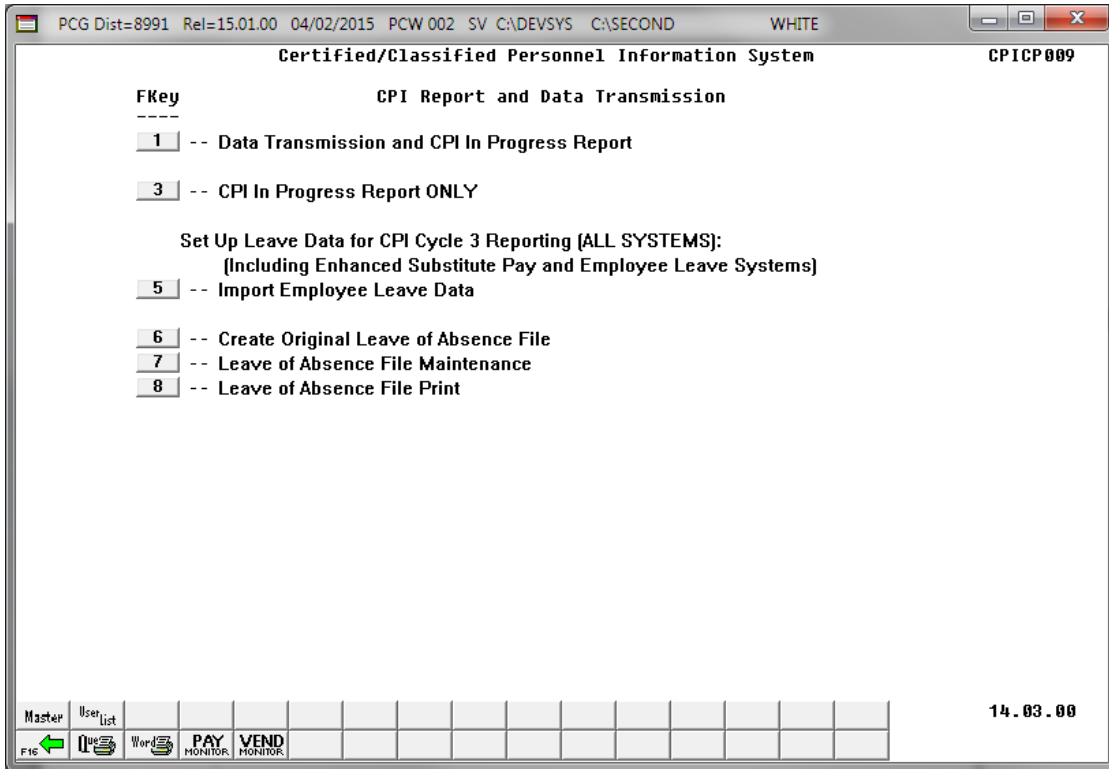
Step	Action
8	Select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .






Topic 5: Printing the Leave of Absence Report



Step	Action
1	Select 9 (F9 - Create CPI Report and Transmission File).

The following screen displays:



Step	Action
2	<p>Select  (F8 - Leave of Absence File Print).</p> <p><i>For school districts and systems that are using the PCGenesis Leave system:</i> A listing of employees by Social Security Number (SSN), employee number, employee name, LUA code, absence type, absence days and the from date of the absence <u>after</u> the Original Leave of Absence File has been created (F6), will be generated.</p> <p><i>For school districts and systems that are not using the PCGenesis Leave system:</i> Select F7 (Leave of Absence File Maintenance) to enter the employees' leave information into the Leave of Absence file and refer to Topic 4: for instructions.</p> <p>The CPI Report and Data Transmission Menu redispays.</p>
3	<p>Select  (F16 - Exit) to return to the Certified/Classified Personnel Information System Master Menu, or select  (Master) to return to the Business Applications Master Menu.</p>
4	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p>Follow the instructions provided in the <i>Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing</i> to create the macro necessary to use the feature where appropriate.</p>

5A. Leave of Absence Report – Example

Page Break							
REPORT DATE	07/28/08	TIME: 14:34	LEAVE OF ABSENCE REPORT			PAGE	1
SOC. SEC. NUMBER	EMPLOYEE NUMBER	DISTRICT NUMBER	ABSENCE TYPE	ABSENCE DAYS	FROM DATE (MM/DD/CCYY)	EMPLOYEE NAME	
999088857	000088857	8991	SLST	000.75	00/00/0000	WORKSHARD, WILLAMINA	
999088857	000088857	8991	VAC1	003.00	00/00/0000	WORKSHARD, WILLAMINA	
999088901	000088901	8991	SLST	002.00	00/00/0000	HICEGUY, BORGAN	
999088926	000088925	8991	SLST	001.00	00/00/0000	KRABBY, KARL	
999088953	000088953	8991	SLST	002.00	00/00/0000	AYES, VIZENTE	
999088978	000088978	8991	SLST	001.00	00/00/0000	WISEGIRL, MILMA	
999088994	000088994	8991	SLST	040.00	00/00/0000	ACCIDENTALLYFELL, APPELIA X	
999089021	000089021	8991	SLST	001.00	00/00/0000	PFZIFFER, CITA	
999089024	000089024	8991	SLST	001.00	00/00/0000	SPELLINGTEACHER, SPARTAN	
999089101	000089101	8991	SLST	001.00	00/00/0000	VU7, MAZELLE	
999089102	000089102	8991	SLST	002.00	00/00/0000	CRGPA, LEARD	

Topic 6: Transmitting the CPI Transmission File to the Georgia Department of Education (GaDOE)

Step	Action
1	<p>Follow normal processing procedures to submit the file via the <i>MyGaDOE</i> Web portal. GA DOE Data Collections provides transmission instructions on the GADOE website. Go to the Data Collections link as shown below:</p> <p>http://www.gadoe.org/Technology-Services/Data-Collections/Pages/Home.aspx</p> <p>Follow the link to <i>Certified/Classified Personnel Information (CPI)</i>, then go to <i>FY ccyy CPI Resources</i> (where 'ccyy' represents the current fiscal year), then go to <i>Transmission Instructions</i>.</p>
2	<p>Navigate to <i>K:\SECOND\GOSEND</i>, locating the <i>CPIRyy##</i> file, where 'yy' is the 2-digit calendar year and '##' is the 2-digit CPI processing cycle.</p> <p><i>If the file does not exist, contact the Technology Management Customer Support Center for assistance.</i></p>
3	<p>Access the <i>MyGaDOE</i> Web portal at: https://portal.doe.k12.ga.us/Login.aspx</p>
4	<p>Enter the <i>CPIRyy##</i>'s filename in the <i>MyGaDOE</i> Web portal's Send this file: field.</p>
5	<p>Follow the on-line prompts to complete the process.</p>