PCGenesis
Current Status & Future Plans

GASBO
Augusta, GA
November 3, 2021
Agenda

• **Introduction**
• PCGenesis Server Requirements
• Migration to Database Technology
• What’s Next
• PCGenesis Databases
• Getting Read for 2022 GHI
PCGenesis
Current Status & Future Plans

PCGenesis Development Team

Steven Roache  Director, Applications Development
Diane Ochala  PCGenesis Lead Analyst/Developer
Angela Tennyson  PCGenesis Senior Developer
Karen McArthur  PCGenesis Developer
PCGenesis
Sessions/Training at GASBO

• Session 1 – 8:40
  – PCGenesis Current Status & Future Plans
  Wed 11/3/2021
• Session 2 – 10:00
  – PCGenesis Future: Migration to a Relational Database
  Wed 11/3/2021
• Session 3 – 11:00
  – PCGenesis and the CPI Process
  Wed 11/3/2021
• Session 4 – 2:10
  – PCGenesis Financial Year-End Procedures
  Wed 11/3/2021
• Session 5 – 3:30
  – Enhanced Leave / Substitute Pay and CPI Cycle 3 Reporting
  Wed 11/3/2021
• Session 6 – 9:00
  – Payroll Tools and Special Functions
  Thur 11/4/2021
• Session 7 – 10:20
  – Payroll Tools Live Demonstrations and Q & A
  Thur 11/4/2021
• Session 8 – 11:20
  – Payroll Best Practices
  Thur 11/4/2021
PowerPoints Available on Documentation Website

2021 GASBO PowerPoints will be available on PCG documentation website

Calendar Year 2021 Release Information
- Release 21.03.00 – Miscellaneous Changes / Conversion to PCGenesDB Database / Installation Instructions
- Release 21.02.00 – 2021 Fiscal Year-End Updates / Conversion to PCGenesDB Database / Installation Instructions
- Release 21.01.00 – Miscellaneous Updates / Conversion to PCGenesDB Database / Installation Instructions

Calendar Year 2020 Release Information
- Release 20.04.00 – Calendar Year 2020 Year-End Closing Procedures / Miscellaneous Updates / Installation Instructions
- Release 20.03.01 – 2021 SHBP Employee Premiums Installation Instructions
- Release 20.03.00 – Miscellaneous Changes / Conversion to PCGenesDB Database / Installation Instructions
- Release 20.02.00 - Fiscal Year 2020 Year-End Updates and Miscellaneous Changes / Installation Instructions
- Release 20.01.00 - Miscellaneous Updates / Installation Instructions

Calendar Year 2020 PowerPoints
- GASBO 2020 Session 1 - PCGenesDB Budget System
- GASBO 2020 Session 2 - PCGenes and CPI
PCGenesis Current Status

• The PCGenesis Development Team:
  • Diane Ochala
  • Angela Tennyson
  • Karen McArthur
PCGenesis Current Status

• The PCGenesis development team reports to:
  ▪ **Steve Roache**, Director, Applications Development
  ▪ Steve Roache reports to **Jay Heap**, Associate Superintendent for Enterprise Services and Applications
  ▪ Jay Heap reports to **Dr. Keith Osburn**, Chief Information Officer, Deputy Superintendent for Technology Services
PCGenesis Current Status

• The PCGenesis development team provides updates to:
  ▪ Amy Rowell, Director, Financial Review.
  ▪ Amy Rowell reports to Rusk Roam, Chief Financial Officer.
PCGenesis Current Status

• In addition to the three developers, we have two help desk personnel.
  ▪ Katie Green
  ▪ Stephanie Smith

• The PCGenesis help desk reports to:
  ▪ Kathy Aspy, Data Collections & Reporting Manager
  ▪ Kathy Aspy reports to Nicholas L. Handville, Chief Data and Privacy Officer Technology Services
PCGenesis Webinars

- Coming soon!!!

- **Stephanie Smith** will start hosting short PCGenesis informational webinars
  - Short segments on various topics
  - Suggestions are welcome!
  - Announcements will come via the portal and broadcast e-mails
Agenda

• Introduction
• **PCGenesis Server Requirements**
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PCGenesis Server Requirements

• Supported Windows Server Versions:
  – Windows Server 2012
  – Windows Server 2016
  – Windows Server 2019
  – Windows Server 2022 – coming soon!
• Workstation Windows 8 and Windows 10 are supported
PCGenesis Server Requirements

• A **stand-alone** server. No other applications can be on the PCGenesis server.
• The **K:** mapping must be defined as a **stand-alone partition** of at least 500 GB
• The PCGenesis server **must be kept up to date** with all Windows operating system service packs applied.
• 32 GB Memory
• 1 TB Hard Drive
• **C:** 500 GB Minimum
• **K:** 500 GB Minimum
PCGenesis Server Requirements

• Create GENUSERS user security group with full access (Read/Write)
• Include all PCG users in this security group
• Map K = \NewServer\PCGenesis$
PCGenesis Server Requirements

- Remote Desktop Connection is the preferred method for all users accessing PCGenesis.
- Better network security!
- PCGenesis processes will continue to run even if the network connection goes down
- Much faster processing
- More reliable data integrity
Agenda

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• **Migration to Database Technology**
• What’s Next
• PCGenesis Databases
• Getting Read for 2022 GHI
PCGENESIS FUTURE
Migration to Database Technology

• We are moving all PCGenesis data to a SQL Server database.
• We are using a FREE version of SQL Server called Microsoft SQL Server Express.
Advantages of a Relational Database

Microsoft SQL server is one of the most robust DBMS software used globally.
Celebrate!!

• We started the FAR conversion in 2019
• And now....
  ◊ The FAR conversion is basically complete!
Celebrate!!!

We’ve Come A Long Way!

• K:\SECOND\PAYDATA
  – GACOUNTY  Georgia Counties  (19.01.00)

• K:\SECOND\FARDATA
  – FACILITY  PO Facilities  (19.02.00)
  – SOURCE  Revenue Source Codes  (19.02.00)
  – BANK  Bank Codes  (19.03.00)
Celebrate!!!

We’ve Come A Long Way!

• Release 20.01.00
• K: \SECOND\FARDATA\NAME
• Account Description File - split into 10 separate tables
  • FAR.Name_01_Fiscal_Year  Fiscal Year
  • FAR.Name_02_Fund        Fund
  • FAR.Name_03_FY_Flag     Fiscal Year Flag
  • FAR.Name_04_Program     Program
  • FAR.Name_05_Function    Function
  • FAR.Name_06_Object      Object
  • FAR.Name_07_Fac_Bldg    Facility/Building
  • FAR.Name_08_Additional  Additional
  • FAR.Name_09_Rev_Source  Source
  • FAR.Name_10_Blnc_Sheet  Balance Sheet
Celebrate!!!

We’ve Come A Long Way!

- **K:\SECOND\FARDATA**
  - ACCOUNT Budget Accounts (20.02.00)
  - ACCOUNTR Revenue Accounts (20.02.00)
  - ACCOUNTTGL GL Accounts (20.02.00)
  - RECEIPT Receipts (20.03.00)
  - RECEIVE Receivables (20.03.00)
  - VENDOR Vendor Codes (20.03.00)
  - INVEST Investments (20.03.00)
Celebrate!!!

We’ve Come A Long Way!

- **K:\SECOND\FARDATA**
  - EXPENSE Claims / Expenses (21.01.00)
  - PO Purchase Orders (21.01.00)
  - POPRINT PO Inventory (21.01.00)
  - GATEKEEPER FAR Transactions (21.02.00)
  - JEMASTER Journals (21.02.00)
  - CHEKMSTR Vendor Check Master (21.02.00)
  - WXFER Vendor Wire Transfers (21.02.00)
Celebrate!!!
We’ve Come A Long Way!

• **K:SECOND\FARDATA**
  – **CONTROL**  System control records  (21.03.00)

• (Last but not Least!)
  – **AUDIT**  The AUDIT File  (21.03.00)
Celebrate!!!
The major financial files have been converted into database tables
◊ Banks ◊ Investments
◊ Vendors ◊ Claims
◊ Sources ◊ Purchase orders
◊ Accounts ◊ Receipts
◊ Audit ◊ Receivables
◊ Journals ◊ Control
Celebrate!!!

• Full financial transaction processing was completed with release 21.03.00!!!
PCGenesis Databases

Transaction Processing: (ACID)

- **Atomicity:** Transactions are all or nothing
- **Consistency:** Only valid data is saved
- **Isolation:** Transactions do not affect each other
- **Durability:** Written data will not be lost
Celebrate!!!

• What does this mean??

◊ Data repairs should be a thing of the past

◊ Posting a financial transaction is “all or nothing”
Transaction Processing

• If a problem occurs during posting, for example, a power outage....
  ◊ All updates will roll back
  ◊ We won’t end up entries on the GL when the claim, journal, or receipt is missing from the file
ALL tables revert to original data

Data is saved into ALL tables

Transaction Processing

UPDATE Person set Name = 'BBB' where ID = 3;

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ABC</td>
<td>34</td>
</tr>
<tr>
<td>2</td>
<td>XYZ</td>
<td>42</td>
</tr>
<tr>
<td>3</td>
<td>PQR</td>
<td>30</td>
</tr>
</tbody>
</table>
Single Threaded Financial Transactions

• We had a learning curve...
  ◊ SQL Critical Deadlock errors
  ◊ Two users post at the same time
  ◊ Each user is waiting for a record the other user controls
  ◊ This may have been the root cause of the “corrupt file” errors in the old days
Single Threaded Financial Transactions

Deadlock in DBMS
Single Threaded Financial Transactions

• Transaction_Gatekeeper table

◊ One record which is used as a “gatekeeper” to allow only **ONE** PCGenesis session to post at a time.

◊ The gatekeeper record locks when the first session starts to post a financial transaction.

◊ If the gatekeeper record is already locked, the second posting process must wait, while the first posting process finishes.
Single Threaded Financial Transactions

Do not cancel processing!!!

**CAUTION** Highlighted Amount(s) OVER-EXPENDED Budgeted Balance(s)
Waiting for another user's update process to complete before starting this update

21.03.00
Celebrate!!!

• How is database performance?
  ◊ Good news – we have a database expert working with our team!
  ◊ We have worked diligently to keep PCGenesis performance comparable to the old file technology
  ◊ Also good news... Our team will continue making changes to improve performance even more!
Celebrate!!!

- Database integrity - “reference constraint”
  - Enforcement of consistency standards on the PCGenesis data
  - It is NOT possible to delete a general ledger, expense, or revenue account which is used in any other table in the system
Database Integrity
“Reference Constraint”

• This means that an account cannot be deleted until all related data is **archived**

• An in-out journal (JE) that zeroes an account balance means that the user will **NOT** be able to delete the account

• Typically data is retained for at least 7 years
Account can’t be deleted, even though balance is zero
Database Integrity
“Reference Constraint”

• Constraints also exist for bank codes
• As data is converted into the PCGenesis database, bank codes have been added
• The banks are used somewhere in PCGenesis: in a claim, a receipt, a journal, a vendor check, or wire transfer
• Bank codes with a reference constraint cannot be deleted until all related data is removed first, usually during an archive operation
Accounts Payable Archive

• Data must be archived from the system so that “child” data is deleted before “parent” data can be deleted

• Before a bank code can be deleted from the system, all journals, receipts, receivables, claims, purchase orders, etc. which utilize the bank code must be deleted first

• Then, the bank code itself can be deleted
Accounts Payable Archive

• To facilitate the archive process, an Accounts Payable Archive function (F1, F13, F20) is now available on the Special Functions Menu

• This function consolidates the archive process for the accounts payable database tables
Accounts Payable Archive

Financial Accounting & Reporting

Special Functions Menu

<table>
<thead>
<tr>
<th>FKey</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Display/Update System Control Data</td>
</tr>
<tr>
<td>13</td>
<td>Display/Update IRS 1099 Control Data</td>
</tr>
<tr>
<td>19</td>
<td>Delete Records from Files by Year/Date Range:</td>
</tr>
<tr>
<td>20</td>
<td>Receipt File (RECEIPT) and Receivable File (RECEIVE)</td>
</tr>
<tr>
<td>20</td>
<td>AP Archive [EXPENSE, P0, POPRINT, CHEKMSTR, WXFER, JE]</td>
</tr>
<tr>
<td>21</td>
<td>Investment File (INVEST)</td>
</tr>
<tr>
<td>22</td>
<td>Audit File (AUDIT)</td>
</tr>
<tr>
<td>23</td>
<td>General Ledger Account Master (ACCOUNTG)</td>
</tr>
<tr>
<td>24</td>
<td>Budget Account Master (ACCOUNT)</td>
</tr>
<tr>
<td>25</td>
<td>Revenue Account Master (ACCOUNTR)</td>
</tr>
<tr>
<td>26</td>
<td>Vendor File (VENDOR)</td>
</tr>
<tr>
<td>30</td>
<td>Special Journal Entry Posting (Password Protected)</td>
</tr>
</tbody>
</table>

21/02/00
Accounts Payable Archive

• Archives....
  ◊ Claims
  ◊ Journals
  ◊ Purchase orders
  ◊ Vendor checks
  ◊ Wire transfers

• all in one process, at the same time!
Accounts Payable Archive

• Removes records if the date of the record is less than or equal to June 30 of the fiscal year entered by the user

• The Accounts Payable Archive will create spreadsheet files of the archived records in the $K:\SECOND\FARyy$ directory

• When we created the PCGenesis database, we brought forward records starting from FY 2008
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What’s Next?

• So, we have finished the FAR conversion...
• What’s next????
PCGENESIS FUTURE
Converting PCGenesis to RDBMS

• Converting to a relational database is a very, very big project
• It will take several years to convert the software
• During that timeframe, major enhancements to PCGenesis will be limited
• Legislative requirements will always be addressed even during the conversion process
November Release

• **2022 SHBP Premiums**

• For the November release, the development team will post a single file which contains the new SHBP health premiums

  GHIRATES2022.csv

• The 21.03.01 release document will provide instructions for uploading the csv file into PCGenesis
21.04.00

December Release

• The December, 2021 release will focus on legislative changes:
  ◊ The Georgia tax withholding is increasing the standard deduction amounts
  ◊ Federal tax withholding tables and FICA limits will change
  ◊ The 1099-NEC form is changing from 2 forms per page to 3 forms per page
Last year’s 1099-NEC form
## 21.04.00 December Release

### 2021 1099-NEC form

| Form 1099-NEC | Cat. No. 72590N | www.irs.gov/Form1099NEC | Department of the Treasury - Internal Revenue Service |
| Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page |

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYER’S TIN</td>
<td>$</td>
</tr>
<tr>
<td>RECIPIENT’S TIN</td>
<td>$</td>
</tr>
<tr>
<td>1 Nonemployee compensation</td>
<td>$</td>
</tr>
<tr>
<td>2 Payer made direct sales totaling $5,000 or more of consumer products to recipient for resale</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4 Federal income tax withheld</td>
<td>$</td>
</tr>
<tr>
<td>5 State tax withheld</td>
<td>$</td>
</tr>
<tr>
<td>6 State/Payer’s state no.</td>
<td>$</td>
</tr>
<tr>
<td>7 State income</td>
<td>$</td>
</tr>
</tbody>
</table>

---

**Nonemployee Compensation**

**Copy A**

For Internal Revenue Service Center File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the 2021 General Instructions for Certain Information Returns.
The December, 2021 release will focus on legislative changes:

◊ We don’t see any significant changes for W-2’s
◊ PCGenesis will support any new requirements for ACA
PCGENESIS FUTURE
Migration to Database Technology

• For year 2022 and beyond....

• Migration of all PCGenesis data to SQL Server Database
At least 80+ individual files today

Combined into 1 database file tomorrow
PCGENESIS FUTURE
Converting PCGenesis to RDBMS

This is all great news for PCGenesis!!
The March, 2022 release will start the PAYROLL conversion to the database.

This will be a big, significant release.

Conversion of 13 files (hopefully)
22.01.00
March Release

• Payroll conversion:
  ◊ PAYDATA\PAYROLL Payroll file
  ◊ PAYDATA\MPAYROLL Manual checks file
  ◊ PAYDATA\PREVVOID Previous voids file
  ◊ SANDBOX\PAYROLL SANDBOX payroll file
22.01.00
March Release

- Payroll conversion:
  - PAYDATA\GROSSDAT Payroll gross data
  - PAYDATA\MGROSDAT Manual checks gross data
  - PAYDATA\VGROSDAT Previous voids gross data
  - SANDBOX\GROSSDAT SANDBOX gross data
  - PERDATA\LGROSDAT Leave substitute gross data
22.01.00
March Release

• Payroll conversion:
  ◊ PAYDATA\PDEDUCT  Payroll deductions
  ◊ PAYDATA\MDEDUCT  Manual checks deductions
  ◊ PAYDATA\VDEDUCT  Previous voids deductions
  ◊ SANDBOX\PDEDUCT  SANDBOX payroll deductions
22.02.00 – 22.04.00

• Continue with the Payroll conversions
• The goal is to have full payroll transaction processing
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PCGenesis Databases

View of databases from within Microsoft SQL Server Management Studio
PCGenesis Databases

K:\PCGSQLdb
- Location of database
K:\PCGSQLdb
• Location of database
PCGenesis Databases

There are six databases for PCGenesis

1) PCGenesisDB
   – PCGenesis financial and payroll production data
   – All of the important PCG data is in this database!
PCGenesis Databases

There are six databases for PCGenesis

2) PCG_Master
   - PCGenesis backup and restore logs
   - Log information
   - Needed if help desk needs to troubleshoot problems with your IT staff
PCGenesis Databases

There are six databases for PCGenesis

3) PCG_Q_DB
   - Corresponds to PAYDATAQ or FARDATAQ
   - Backup of PAYDATA just before Calculate Payroll & Update YTD (Final) (F4)
   - Backup of FARDATA just before updating budget files with vendor check information (F5)
PCGenesis Databases

There are six databases for PCGenesis

4) PCG_D_DB
   - Corresponds to PAYDATAD
   - Backup of PAYDATA after printing payroll checks, but before printing payroll direct deposits (F2, F3, F5)
PCGenesis Databases

• Think of these databases as **restore points**
• Think of these the same way you think of PAYDATAQ, FARDATAQ, PAYDATAD, etc
  – PGG_Q_DB
  – PCG_D_DB
PCGenesis Databases

There are six databases for PCGenesis

5) PCG_LOG_DB
   - Contains a log of changes to
     - FAR.Bank_File
     - PAY.PAYROLL
PCGenesis Databases

There are six databases for PCGenesis

6) VQueueDB
   - Contains the VerraDyne Print Manager associated tables and data
PCGenesis Databases - Backup

- **K:\SECOND** cannot be restored without also restoring the **PCGenesisDB** database.
- These two entities must be kept in sync, otherwise payroll postings may be lost.
PCGenesis Databases - Backup

• What you need for a disaster recovery:
  – K:\SECOND – PCG payroll & financial data
  – K:\PCGSQLdb – The database data for PCG data and the VerraDyne print queue
  – K:\UCTARCHIVE – Archived PCGenesis reports in pdf format
  – K:\UCTPRINT – PCGenesis report files currently in the VerraDyne print queue
PCGenesis Databases - Backup

• New feature!
• Adhoc Backup/Restore Option for PCGenesis Data
• On the System Utilities Menu
• **Backup / Restore PCGenesis Data** (F30, F12).
PCGenesis Databases - Backup

Must call the HELP DESK to restore. Restore requires the DOE password.
PCGenesis Databases - Backup

Backup can be run by anyone as needed! Both PCGenesisDB and K:\SECOND are backed up.
PCGenesis Databases - Backup

** WARNING **
** BACKUP **

** This process will backup PCGENESISDB to PCGENESISDBx, where x is a letter A – K. **
** K:\PCGSQLdb\MSSQLnn.SQLEXPRESSPCG\MSSQL\Backup\PCGENESISDBx.BAK **
** This process will also backup SECOND to SECONDX. Make sure all users are logged out of the system before proceeding. **

Enter a letter A thru K

Pick a letter A thru K

** Press ENTER to Continue **
** Press F16 to Exit **
Used ‘A’ for backup:

Creates **PCGenesisDBA.BAK** in **Backup** folder

This is a backup of the database!
Used ‘A’ for backup:
Creates K:\SECOND\A folder
This is a backup of the SECOND data!
PCGenesis Databases - Backup

• *Backup / Restore PCGenesis Data* (F30, F12).
• This is a quick and easy way to get a backup!
• Backs up the important PCGenesis data.
PCGENESIS FUTURE

• These are very exciting changes for PCGenesis!

Questions?
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Getting Ready for 2022 GHI

- GHI options B1, B2, B3, B6, H1, H2, and K1 are the same.
- GHI tiers 10, 40, 90, 91, 94 – 97 are the same.
- Many GHI premium rates have changed for 2022.
Getting Ready for 2022 GHI

GHI Option from Benefit File
Getting Ready for 2022 GHI

GHI Tier from Benefit File
Getting Ready for 2022 GHI
How to Install 2022 GHI

1) Install PCGenesis Release 21.03.01. This release will automatically upload the new 2022 GHI premium amounts into the Benefit Plan/Option/Tier Maintenance File.

2) Download the DCH open enrollment file.

3) Import State Health Options & Tiers from DCH File.

4) Set State Health Deduction Amount For Active Employees.
Getting Ready for 2022 GHI
How to Install Release 21.03.01

Payroll System

FKey
-----
1 -- Payroll Setup Menu
2 -- Payroll Update Menu
3 -- Payroll Check & Direct Deposit Menu
4 -- Annual Reports Menu
5 -- Monthly/Quarterly/Fiscal/Biennial Reports Menu
8 -- Employee Reports/Labels Menu
9 -- Update/Display Description/Deduction/Annuity Menu
10 -- Earnings History Menu
11 -- Check Reconciliation Menu
12 -- Update/Display Payroll Monitor
13 -- Special Functions Menu
20 -- File Reorganization
### Payroll System

#### Description/Deduction/Annuity Files Menu

<table>
<thead>
<tr>
<th>FKey</th>
<th>Description/Deduction/Annuity Files Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Description File:</strong></td>
</tr>
<tr>
<td>1</td>
<td><strong>Maintain Description Records</strong></td>
</tr>
<tr>
<td>2</td>
<td><strong>Maintain Alpha Description Records</strong></td>
</tr>
<tr>
<td>4</td>
<td><strong>Print Description Records</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Deduction File:</strong></td>
</tr>
<tr>
<td>5</td>
<td><strong>Maintain Deduction Records</strong></td>
</tr>
<tr>
<td>6</td>
<td><strong>Print Deduction Records</strong></td>
</tr>
<tr>
<td>7</td>
<td><strong>Maintain Benefit Plan/Option/Tier Records</strong></td>
</tr>
<tr>
<td>8</td>
<td><strong>Import Benefit Plan/Option/Tier Records</strong></td>
</tr>
<tr>
<td>9</td>
<td><strong>Print Benefit Plan/Option/Tier Records</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Annuity File:</strong></td>
</tr>
<tr>
<td>10</td>
<td><strong>Display/Update Annuity Deduction Control Record</strong></td>
</tr>
<tr>
<td>11</td>
<td><strong>Maintain Annuity Records</strong></td>
</tr>
<tr>
<td>12</td>
<td><strong>Verify/Print Annuity Records</strong></td>
</tr>
</tbody>
</table>
Getting Ready for 2022 GHI

Identify Benefit Plan/Option/Tier Premium Data Import File from Excel

Enter the import file path and name (e.g. C:\BENEDAT\SHBPCCYRATES.CSV)
or F10 to Browse for file

K:\INSTAL\GHIRATES2022.csv

Enter = continue or F16 = Exit
Getting Ready for 2022 GHI
How to Install Release 21.03.01

No errors in Benefit Plan/Option/Tier Premium Import File.

Press enter to load Benefit Plan/Option/Tier Premium Import File.

Press F16 to STOP Process

Press ENTER to process or F16 to exit program
Getting Ready for 2022 GHI
How to Install Release 21.03.01

Payroll System

FKey Description/Deduction/Annuity Files Menu

Description File:
1. - Maintain Description Records
2. - Maintain Alpha Description Records
4. - Print Description Records

Deduction File:
5. - Maintain Deduction Records
6. - Print Deduction Records
7. - Maintain Benefit Plan/Option/Tier Records
8. - Import Benefit Plan/Option/Tier Records
9. - Print Benefit Plan/Option/Tier Records

Annuity File:
10. - Display/Update Annuity Deduction Control Record
11. - Maintain Annuity Records
12. - Verify/Print Annuity Records
Getting Ready for 2022 GHI
How to Install Release 21.03.01

Print Benefit Plan Option Tier File

Report option:  
- Employee premium rates
- Employer contribution amounts

Print rates in effect from: 1/01/2022 To: 12/31/2022
Getting Ready for 2022 GHI

• Download the DCH open enrollment file
Getting Ready for 2022 GHI

• Download the DCH open enrollment file
Getting Ready for 2022 GHI

- Download the DCH open enrollment file
Getting Ready for 2022 GHI

• Download the DCH open enrollment file
Getting Ready for 2022 GHI

• Download the DCH open enrollment file

Do NOT edit the open enrollment file in Microsoft Excel®. Editing the file in Excel causes the formatting of the file to change.
Getting Ready for 2022 GHI

Open Enrollment – Import GHI Option and Tier Elections

• Personnel System (F3)
• Special Functions Menu (F13)
• Import State Health Option & Tier from DCH File (F6)
Getting Ready for 2022 GHI

Next step: Import the Option & Tier File
Getting Ready for 2022 GHI Open Enrollment – Import GHI Option and Tier Elections

Import State Health Option And Tier From DCH File

This process will update the GHI Option and Tier for all employees included in the open enrollment or monthly change file provided by the Department of Community Health.

Select Optional Field to Update:
- County of Residence

Enter the import file path and name OR F10 to Browse For file

C:\TEMP\ARCHIVE.CSV

Enter=Continue or F10=Exit
Getting Ready for 2022 GHI

Set GHI Deduction Amounts

- Personnel System (F3)
- Special Functions Menu (F13)
- Set State Health Deduction Amount For Active Employees (F8)
Getting Ready for 2022 GHI

Don't forget F8 - Set Deduction Amounts
Getting Ready for 2022 GHI
Set GHI Deduction Amounts

Set State Health Deduction Amount For Active Employees
(All substitutes are skipped)

Trial mode to verify changes prior to updating?  N
Reduce premium amount by normal employer paid share?  N
Split premium according to employee’s pay schedule?  N

Set deductions to rates in effect on:  1/01/2022

The following SHBP system deductions will be modified by this process:

<table>
<thead>
<tr>
<th>Ded Code</th>
<th>Ded Desc</th>
<th>Emplr Ind</th>
<th>Emplr Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>NONCERTIFIED MERIT</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>CERTIFIED MERIT</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>BOARD MEMBER MERIT</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

Make sure to set the date to 01/01/2022

After running in trial mode make sure to finish by running in FINAL mode by entering ‘N’
### Getting Ready for 2022 GHI

Set GHI Deduction Amounts

<table>
<thead>
<tr>
<th>Emp Num</th>
<th>Employee Name</th>
<th>Old Ded Amount</th>
<th>Old Plan Amount</th>
<th>New Ded Amount</th>
<th>New Plan Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>087909</td>
<td>OG4E, B04IS</td>
<td>0.00</td>
<td>Y</td>
<td>8.60</td>
<td>Y</td>
</tr>
<tr>
<td>089366</td>
<td>OG4E, EH4RSON</td>
<td>162.58</td>
<td>Y</td>
<td>210.50</td>
<td>Y</td>
</tr>
<tr>
<td>088500</td>
<td>OL5ARY, PA5UL</td>
<td>207.10</td>
<td>Y</td>
<td>252.40</td>
<td>Y</td>
</tr>
<tr>
<td>088740</td>
<td>OM6LEY, EF6AIN</td>
<td>0.00</td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>087836</td>
<td>OR2ELAS, CO2EMAH</td>
<td>167.10</td>
<td>Y</td>
<td>192.40</td>
<td>Y</td>
</tr>
<tr>
<td>087827</td>
<td>OR2URKE, DE2A</td>
<td>167.10</td>
<td>Y</td>
<td>192.40</td>
<td>Y</td>
</tr>
<tr>
<td>089937</td>
<td>PA2SON, DE2ETRIUS</td>
<td>176.70</td>
<td>Y</td>
<td>203.00</td>
<td>Y</td>
</tr>
<tr>
<td>088474</td>
<td>PA2SON, LE2ISHA</td>
<td>128.90</td>
<td>Y</td>
<td>150.40</td>
<td>Y</td>
</tr>
<tr>
<td>088105</td>
<td>PA2VETTE, O22E</td>
<td>0.00</td>
<td></td>
<td>8.60</td>
<td>Y</td>
</tr>
<tr>
<td>089605</td>
<td>PA3NELL, AD3NA</td>
<td>120.80</td>
<td>Y</td>
<td>141.50</td>
<td>Y</td>
</tr>
<tr>
<td>089242</td>
<td>PA3ROTT, J03AS</td>
<td>40.00</td>
<td>Y</td>
<td>68.60</td>
<td>Y</td>
</tr>
<tr>
<td>088693</td>
<td>PA4LSEN, ST4RLING</td>
<td>90.60</td>
<td>Y</td>
<td>116.90</td>
<td>Y</td>
</tr>
<tr>
<td>089894</td>
<td>PA4LSON, EL4ON</td>
<td>128.90</td>
<td>Y</td>
<td>150.40</td>
<td>Y</td>
</tr>
<tr>
<td>087180</td>
<td>PH3LON, NO31A</td>
<td>137.00</td>
<td>Y</td>
<td>159.30</td>
<td>Y</td>
</tr>
<tr>
<td>088361</td>
<td>PI2KENS, TI2ANY</td>
<td>0.00</td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

**ERROR** **SHBP Option/Tier 07/97 not found in Benefit deduction file**

<table>
<thead>
<tr>
<th>Emp Num</th>
<th>Employee Name</th>
<th>Old Ded Amount</th>
<th>Old Plan Amount</th>
<th>New Ded Amount</th>
<th>New Plan Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>087379</td>
<td>PI4T, CLASSIE</td>
<td>0.00</td>
<td>Y</td>
<td>8.60</td>
<td>Y</td>
</tr>
<tr>
<td>087941</td>
<td>PO2DER, TI2N</td>
<td>137.00</td>
<td>Y</td>
<td>159.30</td>
<td>Y</td>
</tr>
</tbody>
</table>
Agenda

• **PCGenesis Broadcast E-mail List**
• User Input
PCGenesis User List

• The Ga DOE has created an e-mail user list for PCGenesis
• This is a discussion forum
• Users can broadcast an e-mail to all PCGenesis users enrolled in the group
PCGenesis User List

• We already have 209 registered users
• Any user involved with PCGenesis can join:
  – Financial Directors
  – Payroll Administrators
  – IT Specialists
PCGenesis User List

• Those PCGenesis districts and RESAs that join the user list will be able to:
  – Share ideas
  – Discuss problems
  – Have many more resources available for gaining insight into PCGenesis operations
PCGenesis User List

• Join by sending a blank e-mail to:
  join-pcgenesis@list.doe.k12.ga.us

• After joining, users can take advantage of discussion forums by sending e-mails to:
  pcgenesis@list.doe.k12.ga.us
Agenda

• PCGenesis Broadcast E-mail List
• User Input
Future Plans
Help us focus our efforts

• What major feature/function do you need?
• We welcome your input/requests in writing
• Complete the ‘Comments and Requests’ today
• Provide your input during the discussions
Site Recommendations

• Upgrade any server > 3 to 5 years old
• Implement **Remote Desktop** access !!!!
• Weekly full system backup of **K:\*.*** (Retain 3 weeks)
• Daily backups of data (**K:\SECOND** and **K:\PCGSQDDL**) to CD/DVD/USB (Retain for 1 month)
• Document restore procedures for emergencies
PCGenesis Documentation

http://www.gadoe.org/Technology-Services/PCGenesis/Pages/default.aspx
## PCGenesis Documentation

### PCGenesis

- **Financial Accounting and Reporting System Operations Guide**
- **Payroll System Operations Guide**
- **Personnel System Operations Guide**
- **Certified/Classified Personnel Information (CPI) System Operations Guide**
- **Budget System Operations Guide**
- **LUAS Manual**
- **Technical System Operations Guide**
- **Release Information**
Questions?
Thank you for attending!