



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

3/30/2020

Section I: Special Functions, V2.10

## Revision History

Date	Version	Description	Author
3/30/2020	2.10	20.01.00 – Update instructions for the <i>CPI Rollover</i> .	D. Ochala
07/01/2019	2.9	19.02.00 – Increased assignments from 6 to 15. Add button bar to screenshots.	D. Ochala
02/02/2018	2.8	18.01.00 – Update menu screenshots.	D. Ochala
06/03/2016	2.7	16.01.00 – Update Logo and Footers.	S. Scrivens
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01/21/2011	2.5	10.04.01 – Updated <i>Update Employees' Job Code for CPI/Payroll/CSI</i> section with new screen.	D. Ochala
11/29/2010	2.4	10.03.01 – Added <i>Update Employees' Job Code for CPI/Payroll/CSI</i> section.	D. Ochala
03/29/2010	2.3	10.01.00 – Updated <i>Replace Work Locations</i> section.	D. Ochala
03/31/2009	2.2	09.01.00 – Changed section title to “ <i>Section I</i> ”.	C. W. Jones
05/05/2008	2.1	08.01.00 – Clarified the <i>CPI Rollover</i> procedure as it pertains to CPI biographical information within the <i>Overview</i> .	C. W. Jones
10/02/2007	2.0	07.03.00 – Updates to screenshots, no programmatic changes.	C. W. Jones

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## Overview

**File Reorganization:** The file reorganization procedure restores PCGenesis system file integrity, and improves overall system performance. Be aware that power disruptions, disk drive failures, or improper log offs may at times affect data integrity. *Do not cancel processing under any circumstances during file reorganization.* The file reorganization procedure however will neither restore files from a backup, nor will it recover lost records.

**Replacing Work and Pay Locations:** These procedures allow mass updates to payroll and work location codes and updates from one facility to another. It is most commonly performed when one school or facility closes and another opens. Running this process will automatically change work and pay location codes from the old location code to the new location code for all affected employees.

**CPI Process Control Inquiry:** PCGenesis users typically perform this procedure at the beginning of the school year to enter new CPI dates on the *CPI Process Control Inquiry* screen. The Georgia Department of Education (GaDOE) Data Collection Division determines these dates and posts the same on the Data Collection web page at: <http://www.gadoe.org/Technology-Services/Data-Collections/Pages/Home.aspx>.

**CPI Rollover:** The *CPI Rollover* increases the values of the **Last CPI Rollover Cycle** and the **Final Trans. Cycle** (Final Transmission Cycle) fields on the *CPI Process Control Inquiry* screen by one.

When rolling over from **Cycle Three** to **Cycle One**, the **Years Exp** (Years Experience) fields are incremented for all employees whose **Advance/Inhibit** flag is left blank. Based on the employee's **Advance/Inhibit** flag, the *CPI Rollover* modifies employees' years of experience, and increments the employee's pay by one step, where appropriate. This is the only rollover cycle which causes the *CPI Biographical Data* screen's **Cert Years of Experience** and **Local Years Experience** fields to be incremented by one year.

If an employee should not have their years of experience incremented, set the **Advance/Inhibit** flag to **A** (Inhibited Due to Performance, Other) or **E** (Inhibited Due to Lack of Experience). After the rollover from **Cycle Three** to **Cycle One** is complete, the **Advance/Inhibit** flag will be cleared for all employees.

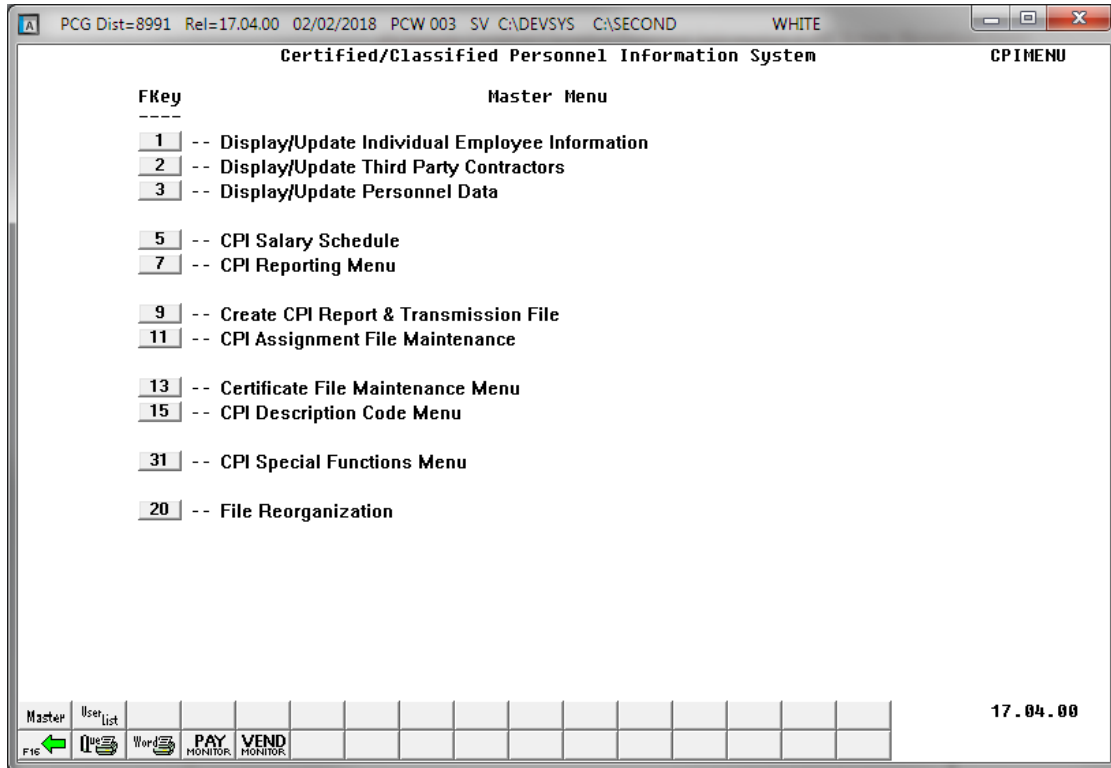
The '**Update classified salaries**' option is displayed when rolling over from **Cycle Three** to **Cycle One**. When the '**Update classified salaries**' field is set to '**Y**', the **Annual Classified Salary** field on the *CPI Biographical Data* screen will automatically default to the employee's **Contract Salary** amount to the *Update/Display Gross Data* payroll screen when **Classified Employment Basis** field is greater than zero and the **Certified Employment Basis** field equals zero in CPI. If the **Certified Employment Basis** field is greater than zero, the **Annual Classified Salary** field will not be updated even if the **Classified Employment Basis** field is also greater than zero. This feature facilitates getting ready for **CPI Cycle One** by having almost all classified salaries updated automatically.

As a matter of convenience, PCGenesis automatically prints the *Expired Certificate Report* when users perform the *CPI Rollover* process. Review this report to determine if the school district or the system's certified and paraprofessional employees' certificates will expire during the upcoming CPI reporting cycle.

## Topic 1: Reorganizing CPI Files

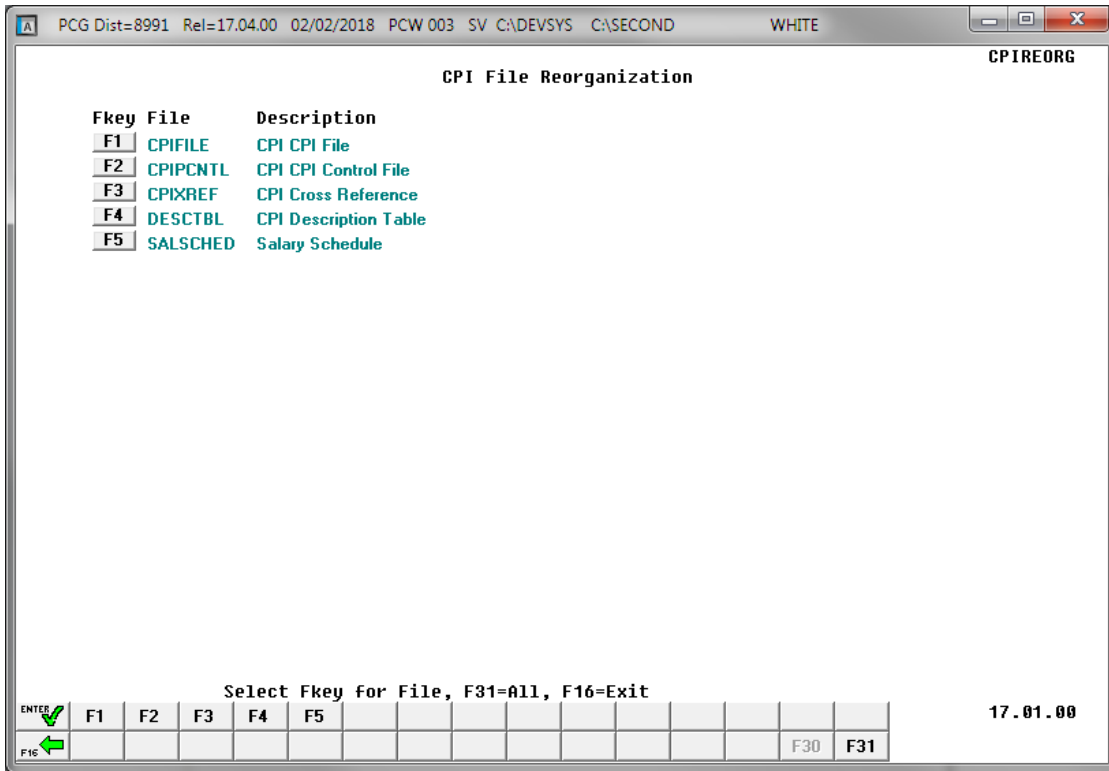
Step	Action
1	From the <i>Business Applications Master Menu</i> , select <b>F4</b> (F4 - Certified/Classified Personnel Information System).

The following screen displays:



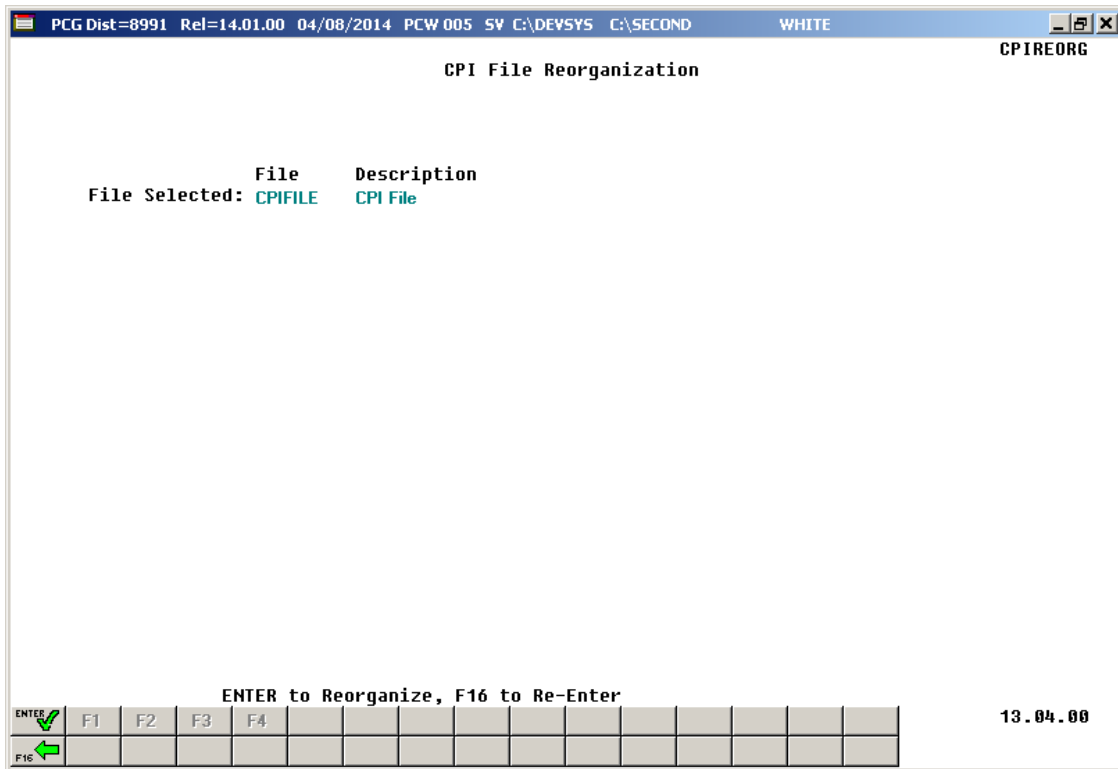
Step	Action
2	Select <b>20</b> (F20 – File Reorganization).

The following screen displays:




Step	Action
3	Select the Fkey of the desired file.

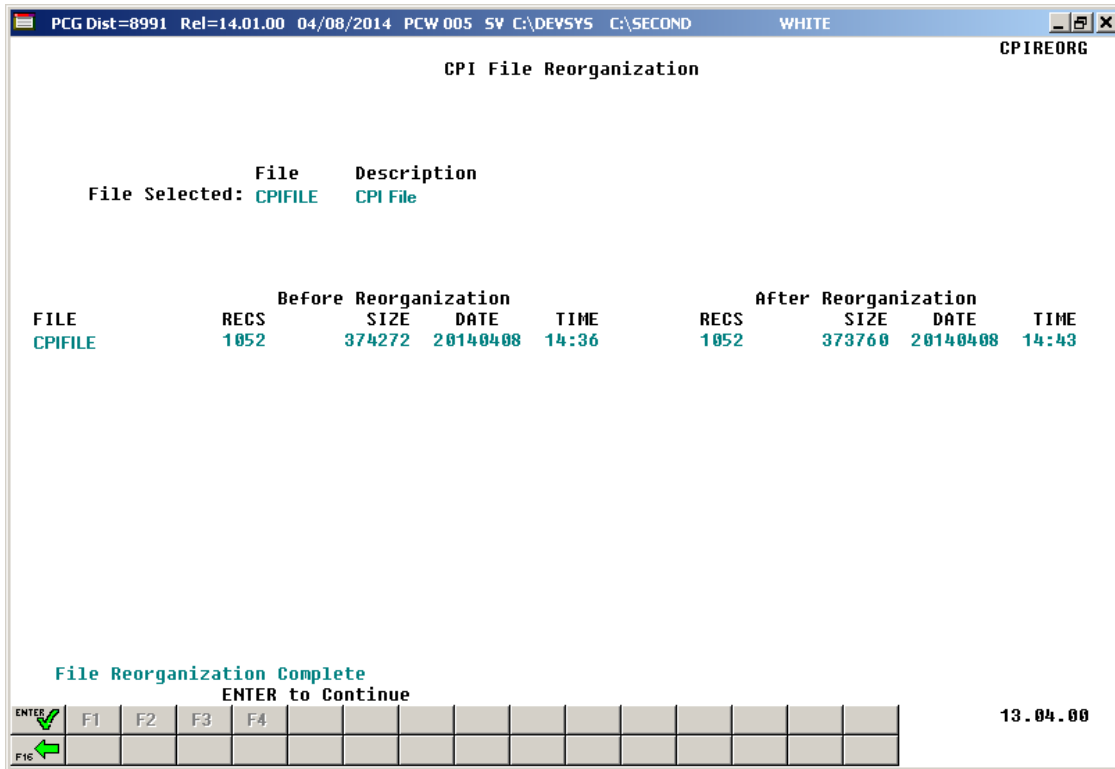
For **Step 3-F1** selections, the following screen displays:




Although the screenshot examples display **F1 - CPIFILE** results, the steps also apply to the other Fkey selections.

Step	Action
4	Select  ( <b>Enter</b> ) to reorganize. “**File is being reorganized, do not cancel processing! **” briefly displays.

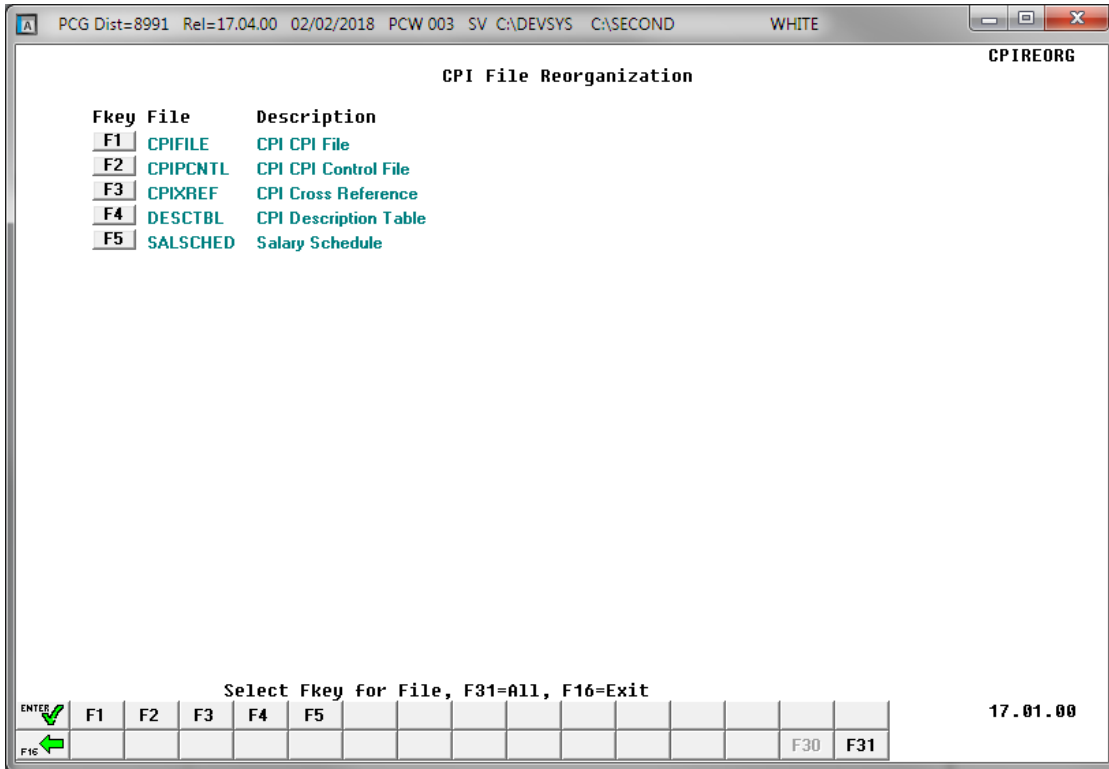
The following screen displays:




Step	Action
<b>5</b>	<p>Verify that the number of records (<b>RECS</b>) before the reorganization match the number of records (<b>RECS</b>) after the reorganization.</p> <p>Select  (<b>Enter</b>) to continue.</p> <p><i>If the <b>RECS</b> fields are NOT the same please contact the Help Desk for assistance. In this instance, contact the Technology Management Customer Support Center immediately. Do not continue processing!</i></p>

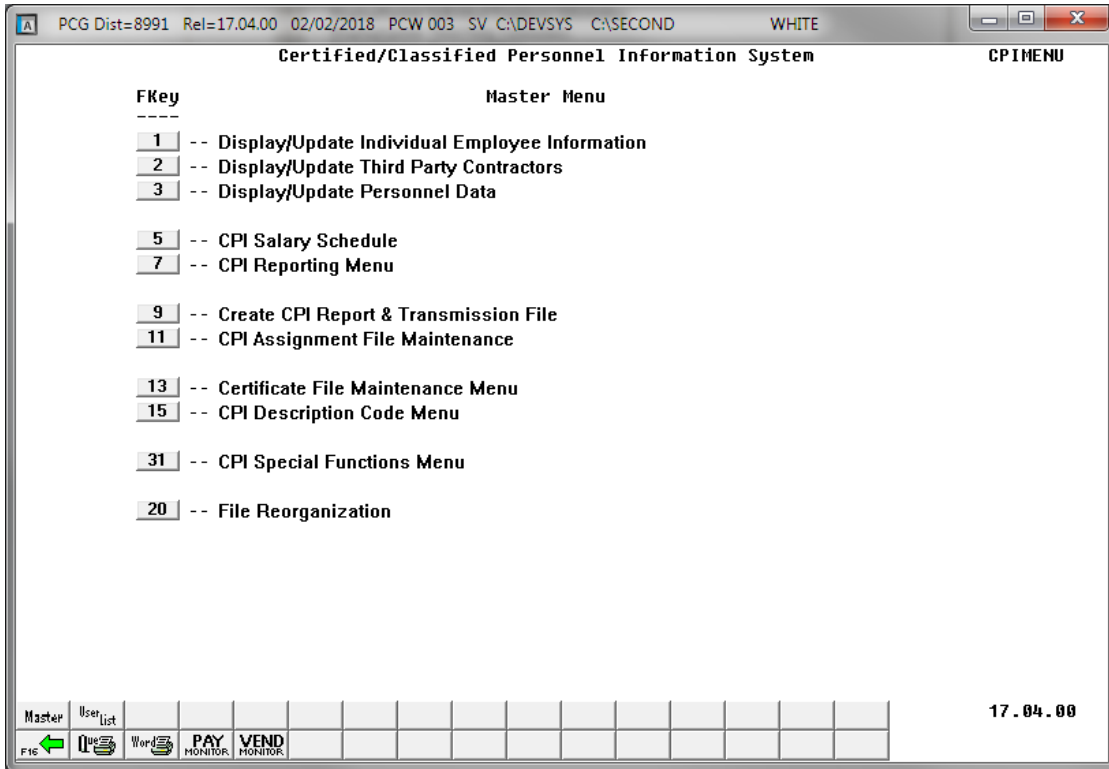


The following screen displays:



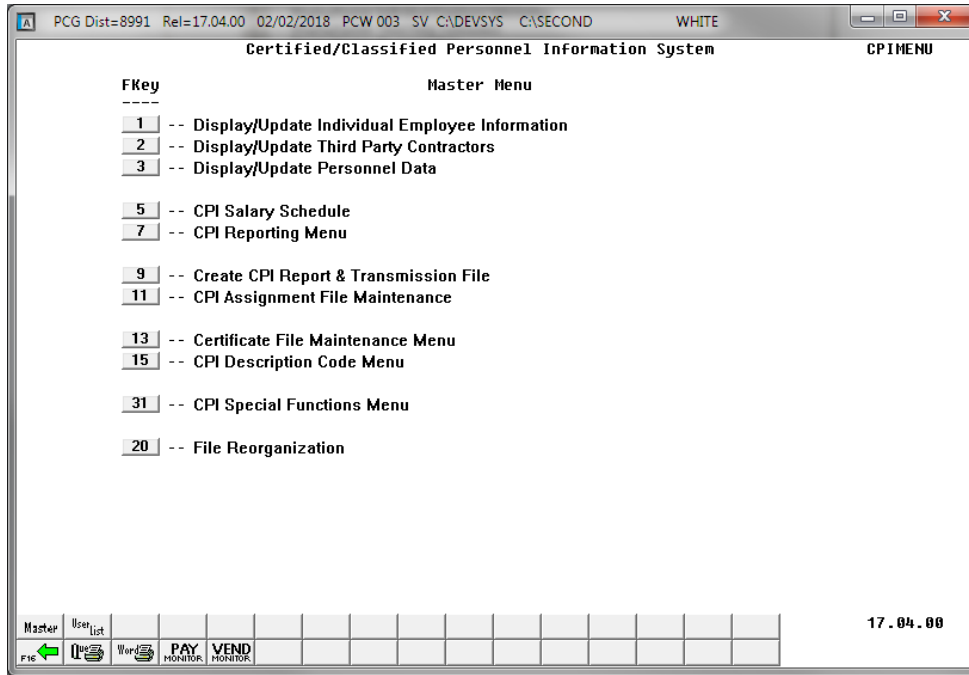
Step	Action
6	<p>Select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System Menu</i>.</p> <p><i>If there are additional CPI files to be reorganized, repeat this procedure beginning at Step 3.</i></p>

The following screen displays:



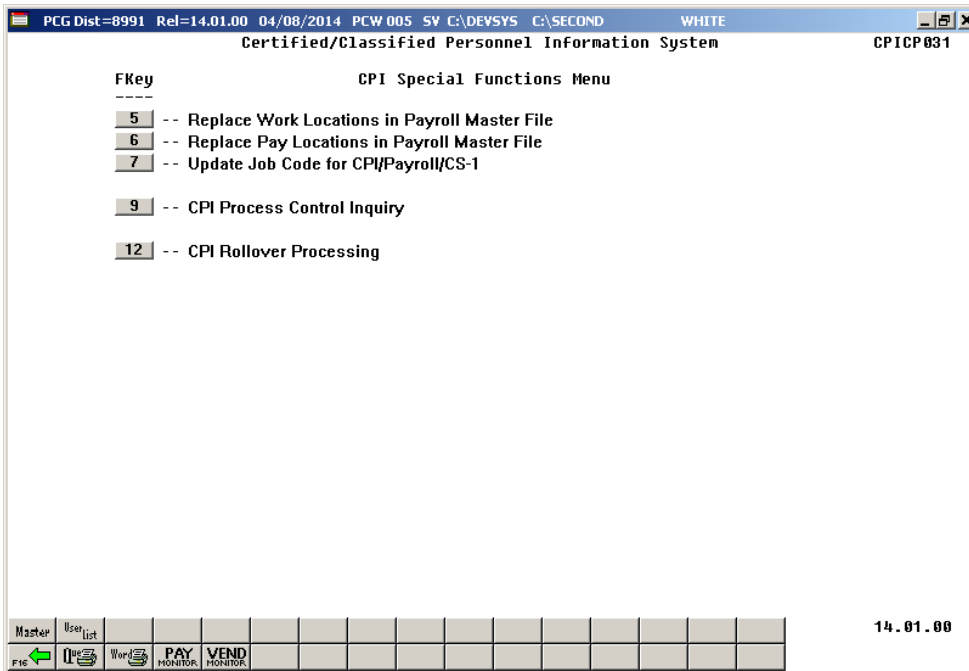
Step	Action
7	Select  (F16 -Exit) or select  ( <b>Master</b> ) to return to the <i>Business Applications Master Menu</i> .

## Topic 2: Replacing Work Locations in the Payroll Master File



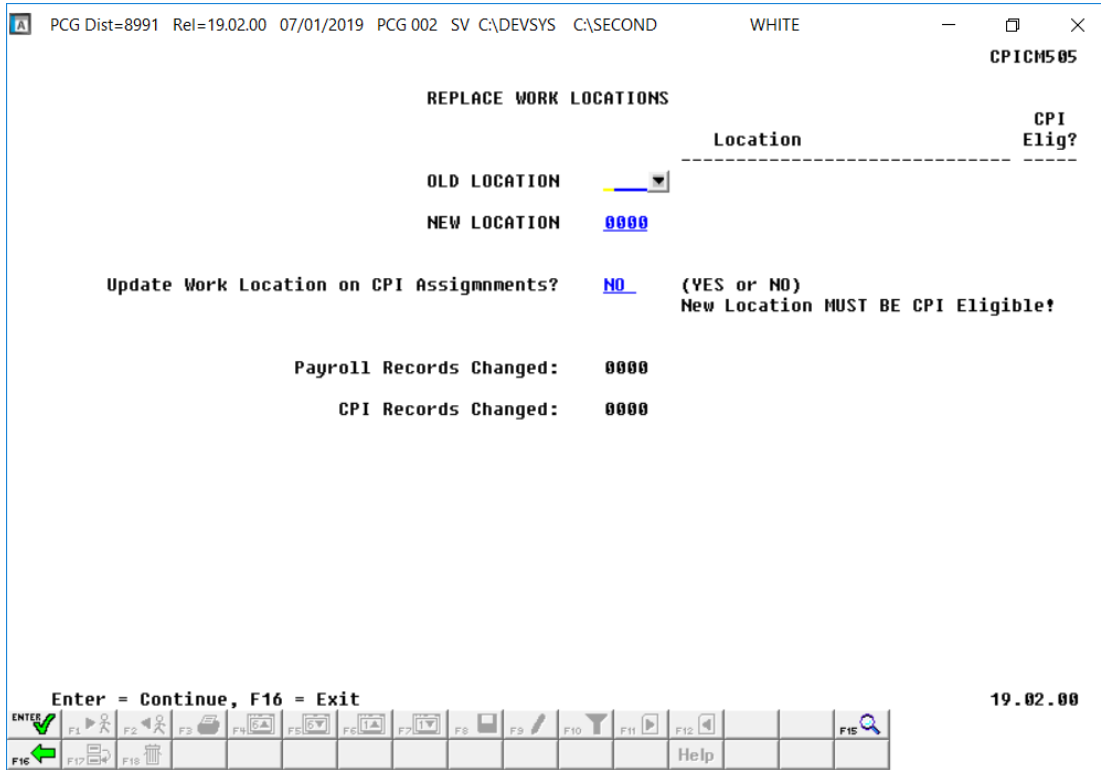
Step	Action
1	Select <b>F31</b> (F31 – CPI Special Functions Menu).



The following screens displays:



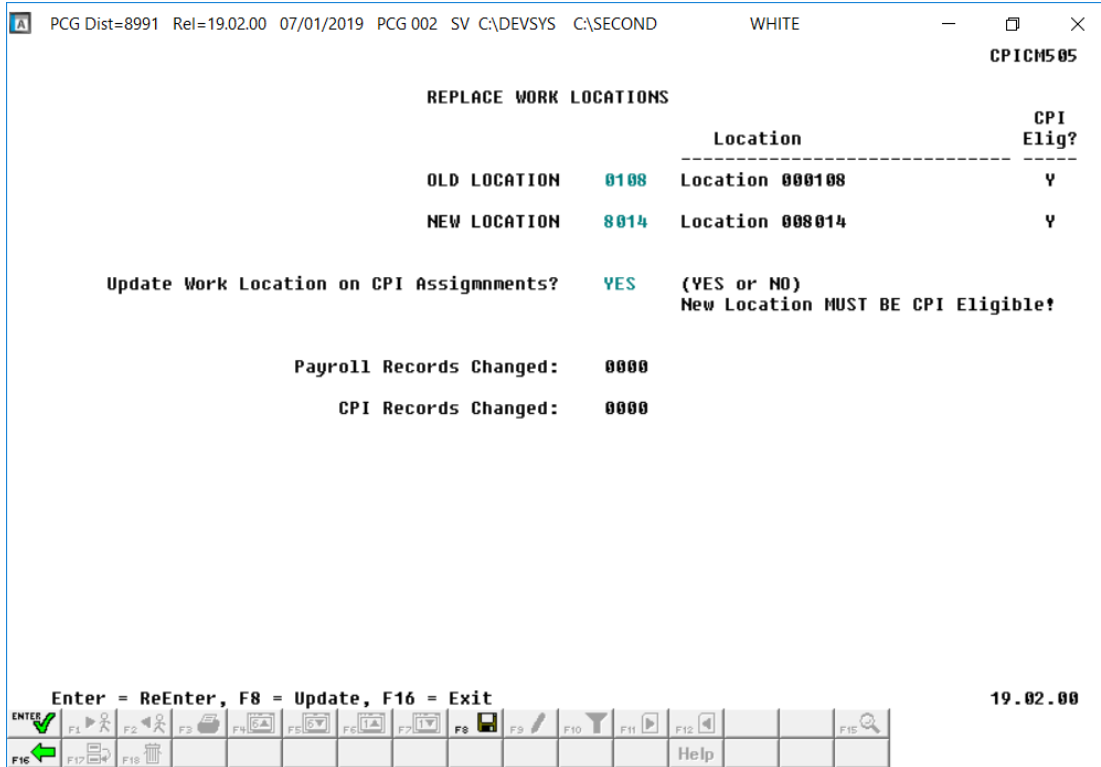
Step	Action
2	Select  (F5 – (Replace Work Locations in Payroll Master File)).





The following screen displays:



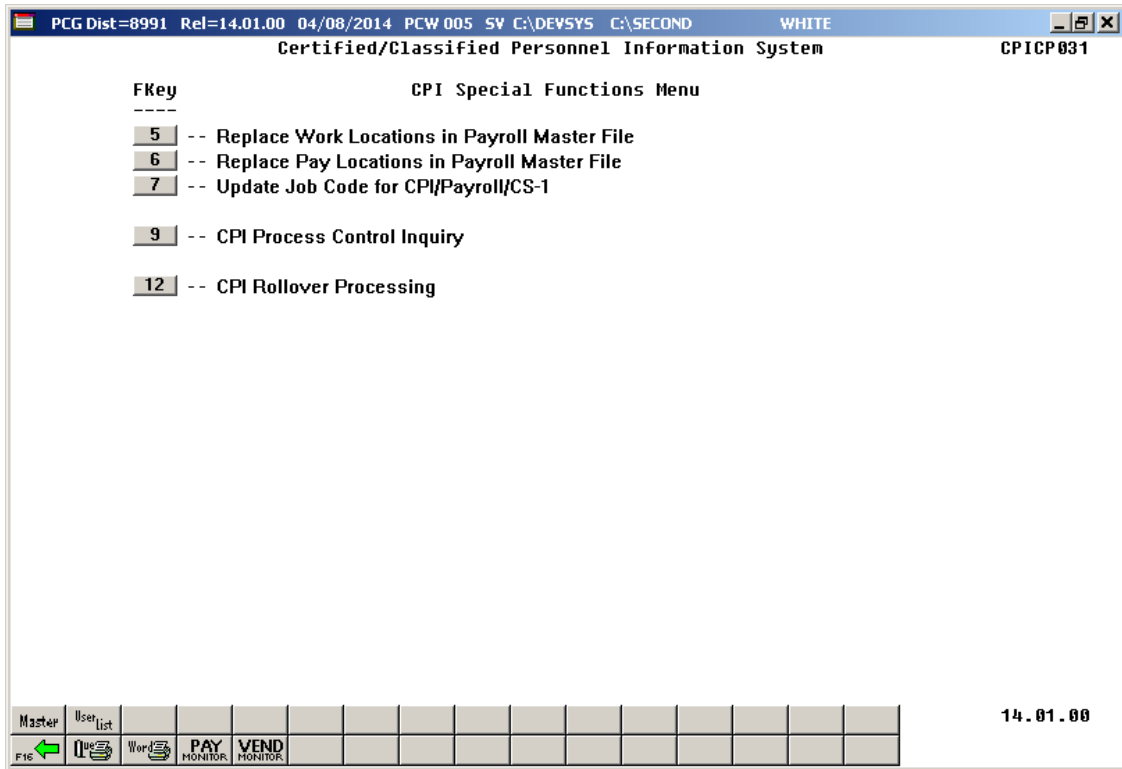
Step	Action
3	Enter the four-digit work location code or select the drop-down selection icon  in the <b>Old Location</b> and the <b>New Location</b> fields to select the desired locations.
4	Type 'YES' or 'NO' in the <b>Update Work Location on CPI Assignments?</b> field. In order to update CPI assignment records, answer 'YES', otherwise, answer 'NO'. <i>Updating the CPI assignment records with the New Work Location code is optional.</i> <i>If updating CPI assignment records, the New Work Location code must be defined as CPI Eligible on the Description File.</i>
5	Select  ( <b>Enter</b> ) to continue.



The following screen displays:



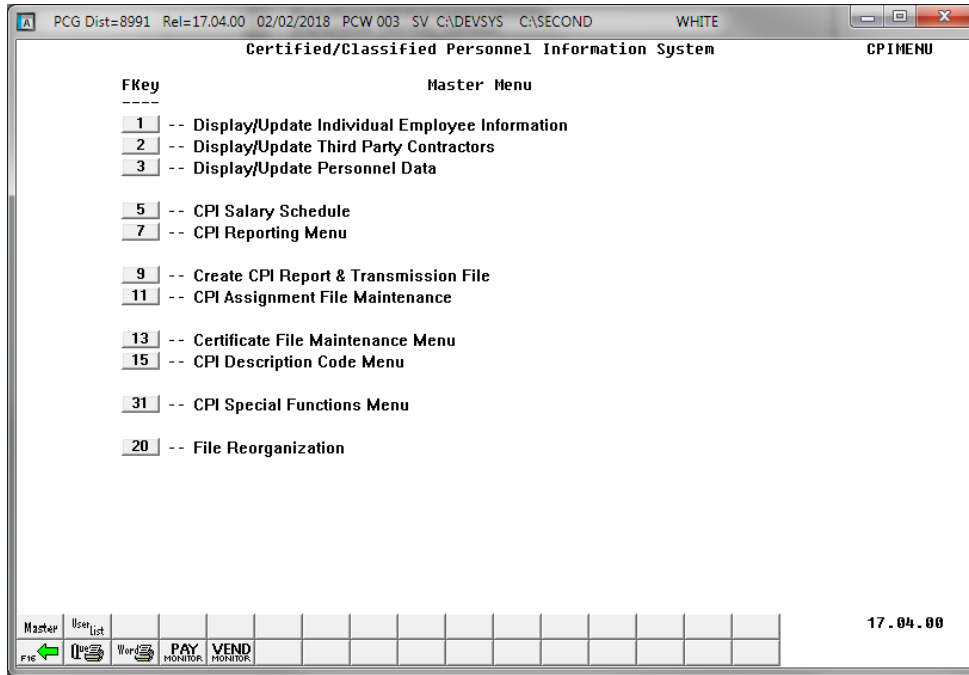
Step	Action
6	<p>Select  (F8) to update.</p> <p>To reenter the old and new work locations, press  (ENTER) to correct the information. To abort the procedure, press  (F16).</p> <p>“** Processing Request **” briefly displays. The Replace Work Locations screen redisplay.</p> <p>Review the <b>Payroll Records Changed</b> field and the <b>CPI Records Changed</b> field to verify that the appropriate records were updated.</p>
7	<p>For additional work locations repeat this procedure beginning at Step 3.</p> <p>If there are no additional work location replacements, select  (F16 - Exit) to return to the <i>CPI Special Functions Menu</i>.</p>

The following screen displays:



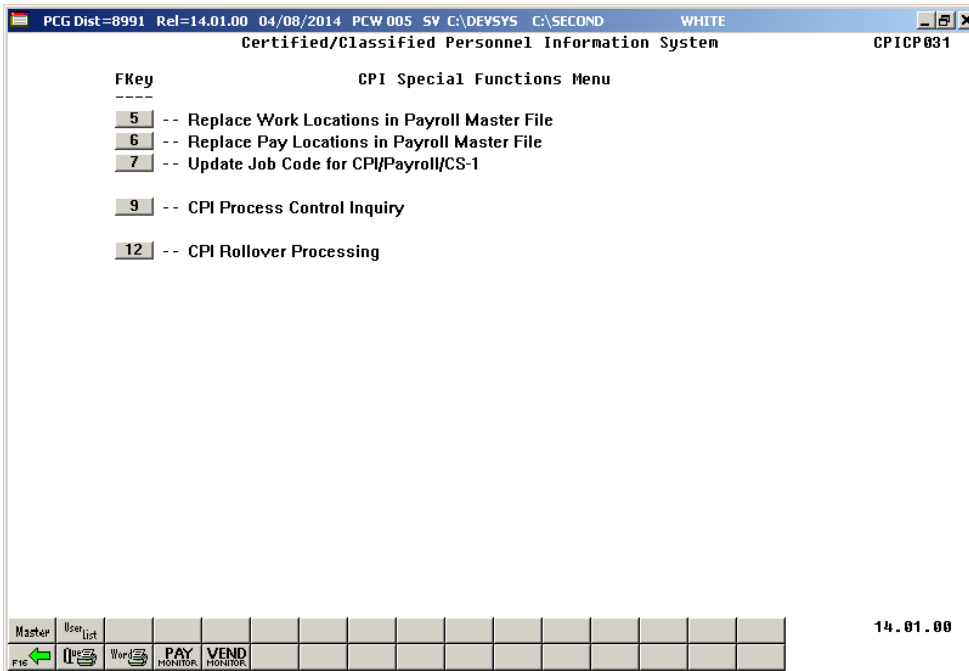
Step	Action
8	Select  (F16 -Exit) to return to the <i>Certified/Classified Personnel Information System</i> – <i>CPI Special Functions Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .

## Topic 3: Replacing Pay Locations in the Payroll Master File



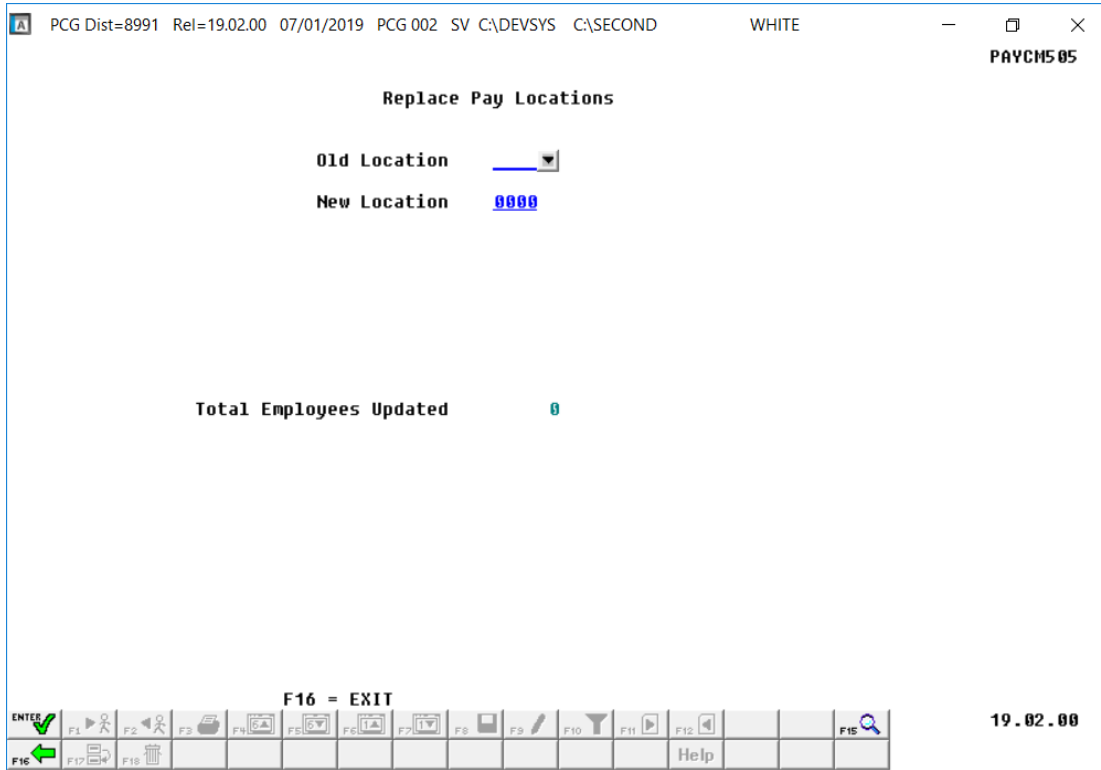
Step	Action
1	Select <b>F31</b> (F31 – CPI Special Functions Menu).



The following screens displays:



Step	Action
2	Select <b>F6</b> ( <b>F6</b> – Replace Pay Locations in Payroll Master File).

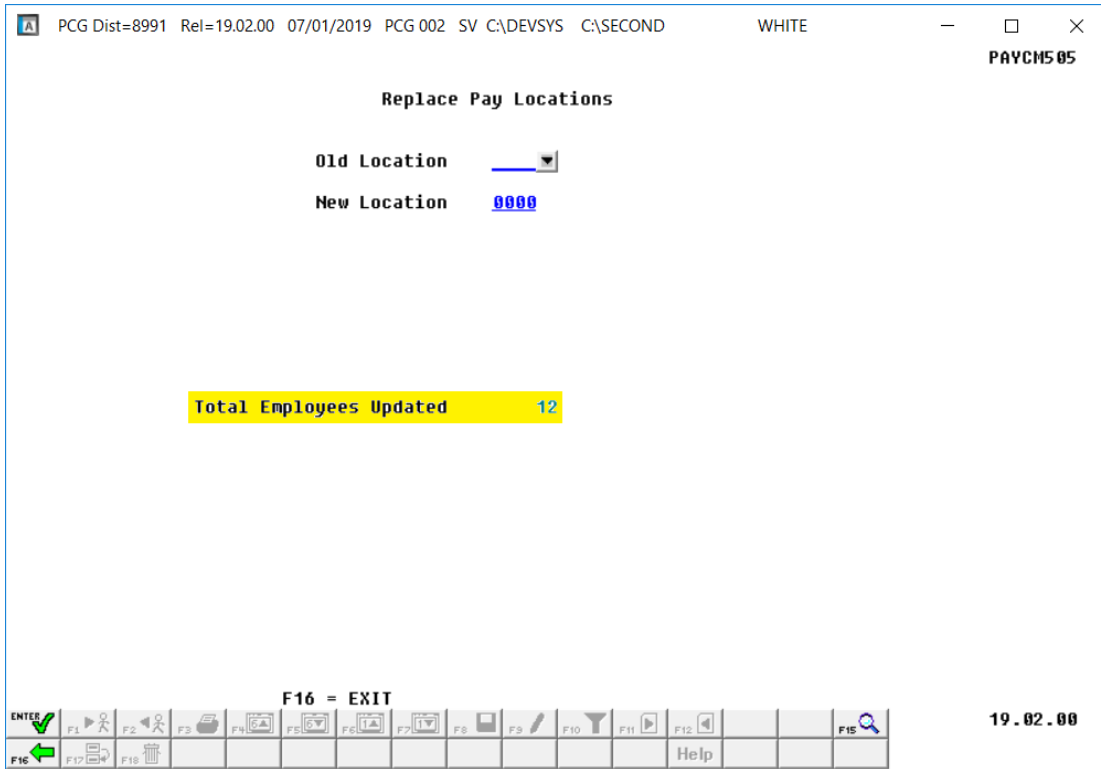
The following screen displays:




Step	Action
3	Enter the four-digit payroll location code or select the drop-down selection icon  in the <b>Old Location</b> and the <b>New Location</b> fields to select the desired locations.
4	Select  ( <b>Enter</b> ) twice. <i>“** Processing Request **”</i> briefly displays.

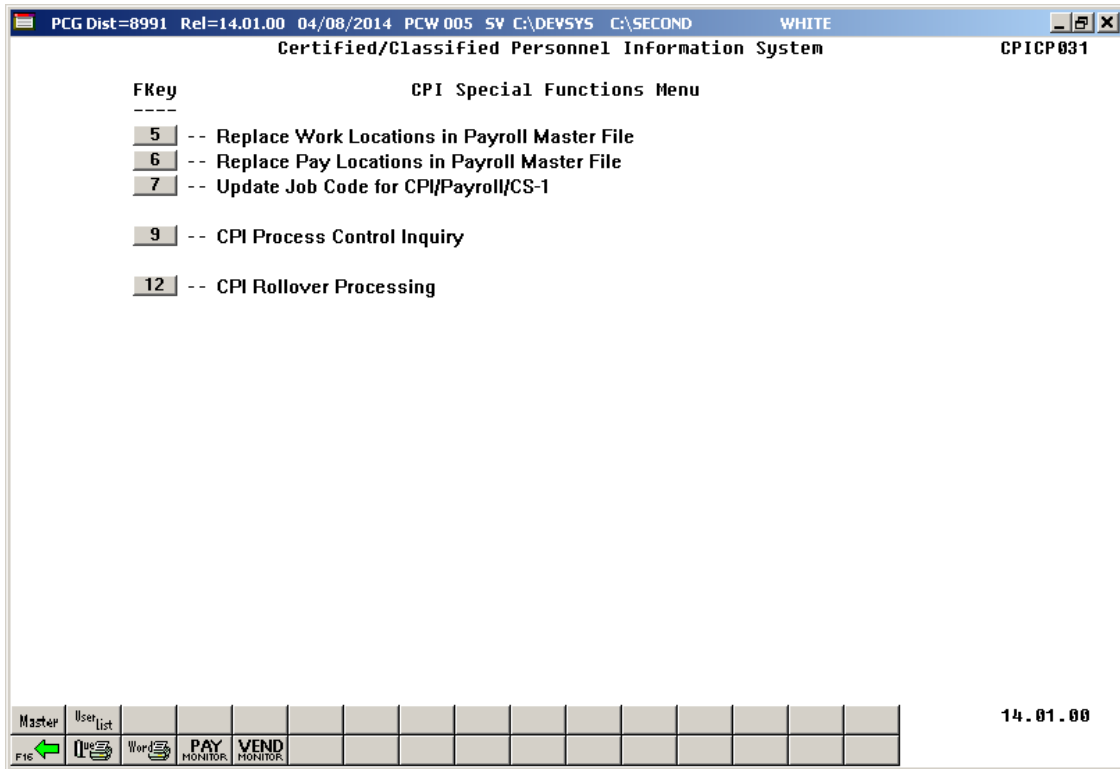




The following screen displays:



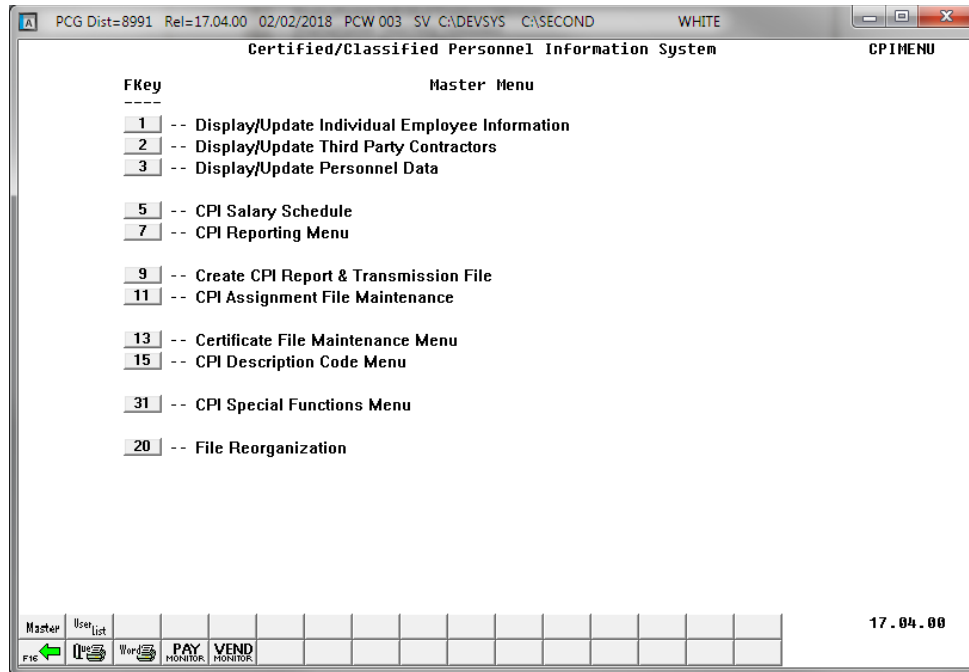
Step	Action
5	Review the <i>Total Employees Updated</i> field's entry, and select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System – CPI Special Functions Menu</i> . For additional work locations, repeat this procedure beginning at Step 3.

The following screen displays:



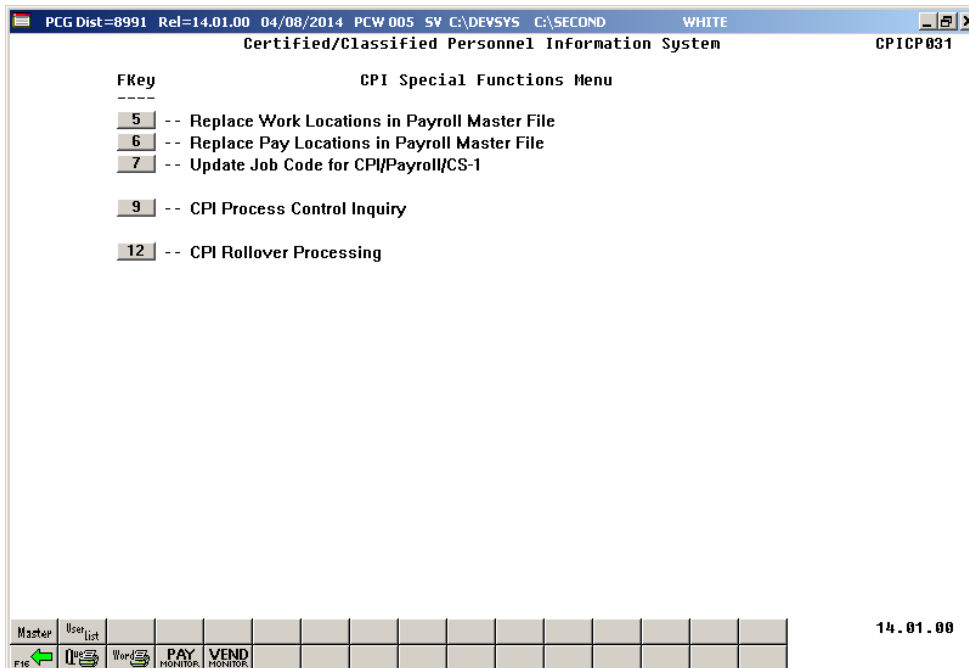
Step	Action
6	Select  (F16 -Exit) to return to the <i>Certified/Classified Personnel Information System – CPI Special Functions Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .

## Topic 4: Entering the GaDOE Termination Date and Printing the CPI Process Control Inquiry Screen



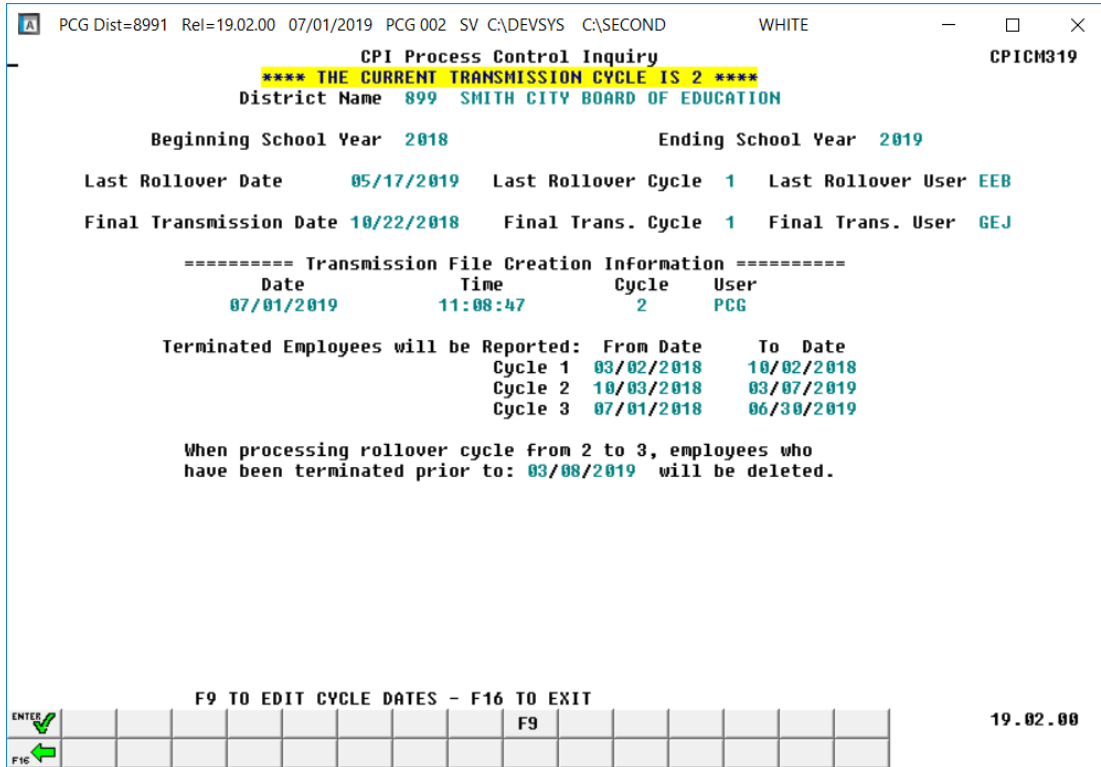
Step	Action
1	Select <b>F31</b> (F31 – CPI Special Functions Menu).


The following screens displays:




Step	Action
2	Select <b>F9</b> (F9 – CPI Process Control Inquiry).

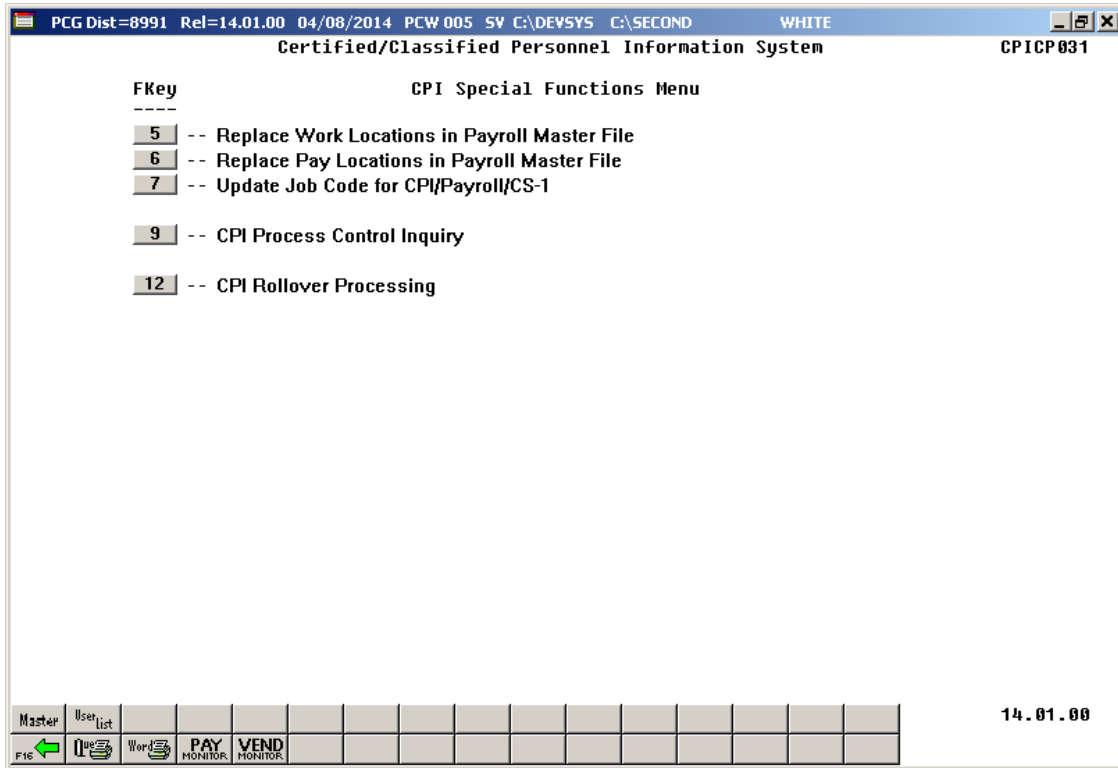
The following screen displays:





Step	Action
3	Select <b>F9</b> (F9 -to edit cycle dates). <i>When the CPI Process Control Inquiry screen initially displays, PCGenesis positions the blinking cursor in the upper left corner of the screen. When selecting <b>F9</b> (F9), PCGenesis repositions the cursor in the Cycle 1 From Date field.</i>
4	Enter the date ranges (MM DD) provided by GaDOE Data Collection in the <b>From Date</b> and <b>To Date</b> fields. <i>The CPI Rollover module determines the year (YY). These dates are located at: <a href="http://www.gadoe.org/Technology-Services/Data-Collections/Pages/Home.aspx">http://www.gadoe.org/Technology-Services/Data-Collections/Pages/Home.aspx</a>.</i>
5	Select  (Enter) <u>twice</u> .
6	Screen-print the <i>CPI Process Control Inquiry</i> screen where appropriate.

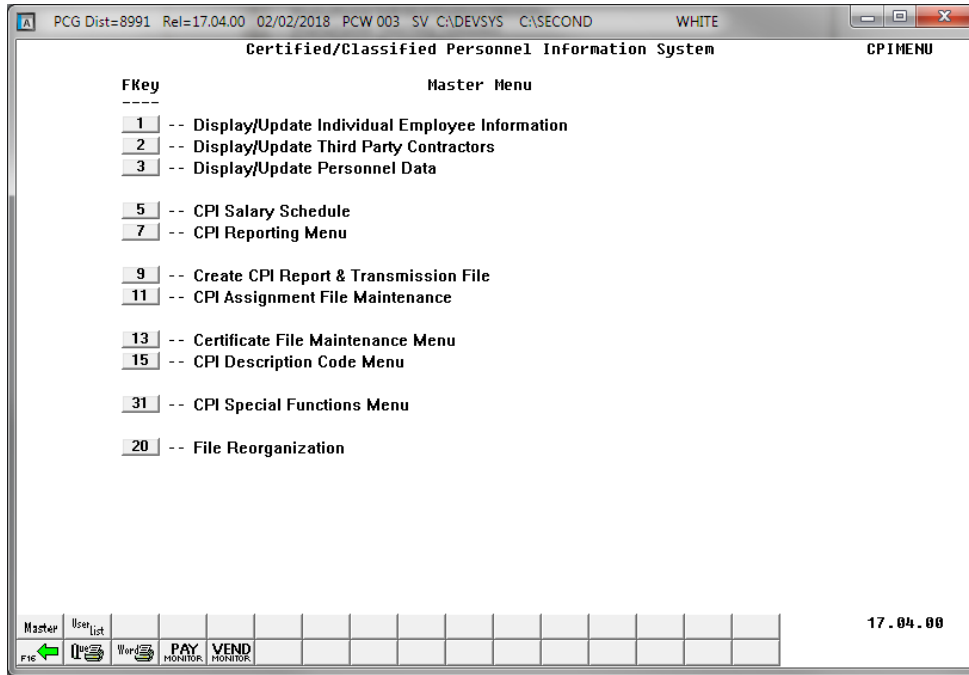
Step	Action
7	Select  (F16 - Exit) to return to the <i>Certified/Classified Personnel Information System - CPI Special Functions Menu</i> .

The following screen displays:



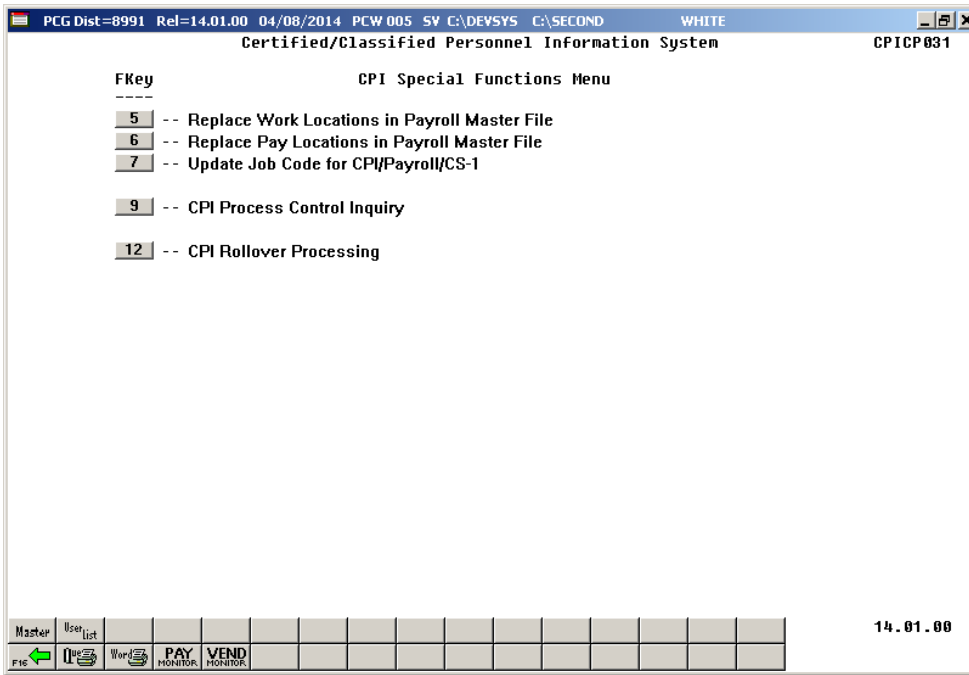
Step	Action
8	Select  (F16 -Exit) to return to the <i>Certified/Classified Personnel Information System Master Menu</i> , or select  ( <b>Master</b> ) to return to the <i>Business Applications Master Menu</i> .

## Topic 5: Performing the CPI Rollover



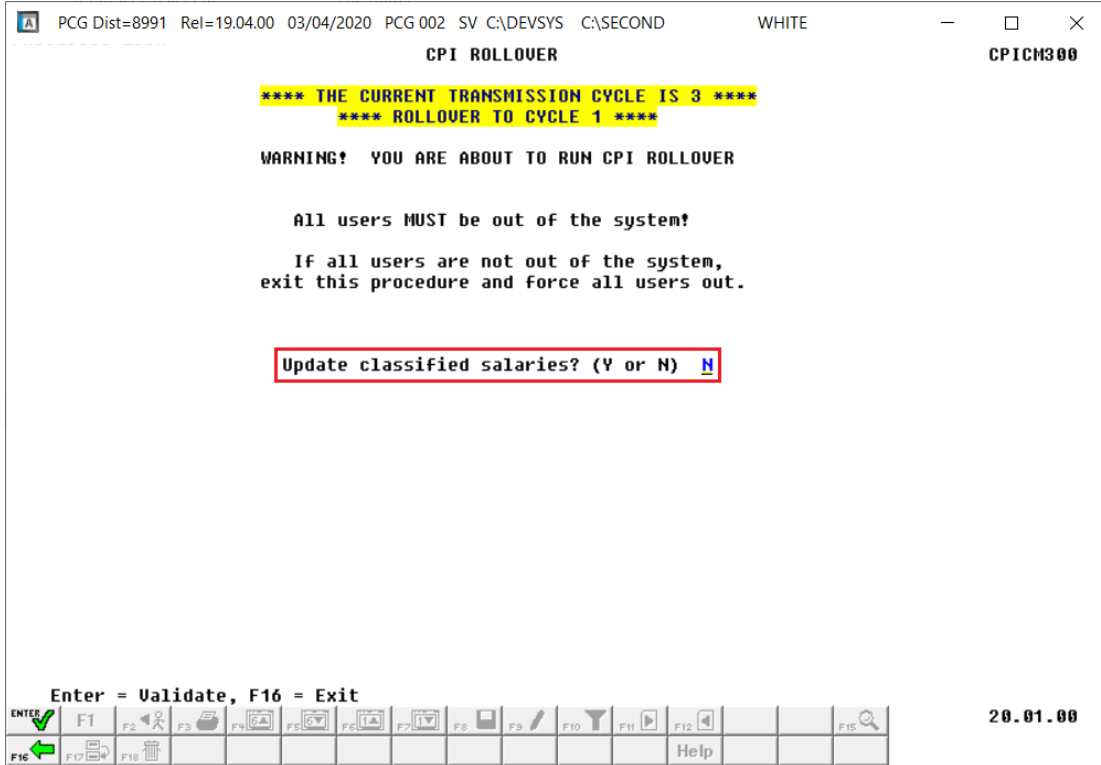
Step	Action
1	Select <b>F31</b> (F31 – CPI Special Functions Menu).

The following screens displays:

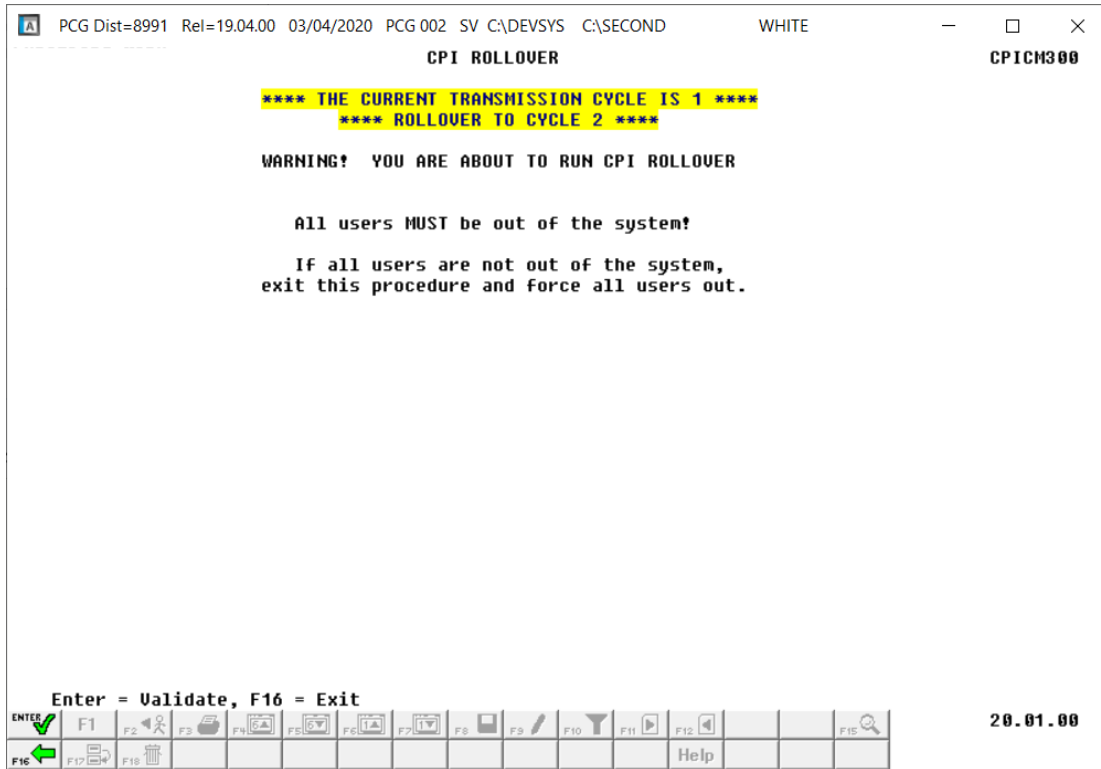



Step	Action
2	Select <b>F12</b> ( <b>F12</b> – CPI Rollover Processing).

The following screen displays when rolling from **CPI Cycle 3** to **CPI Cycle 1**:



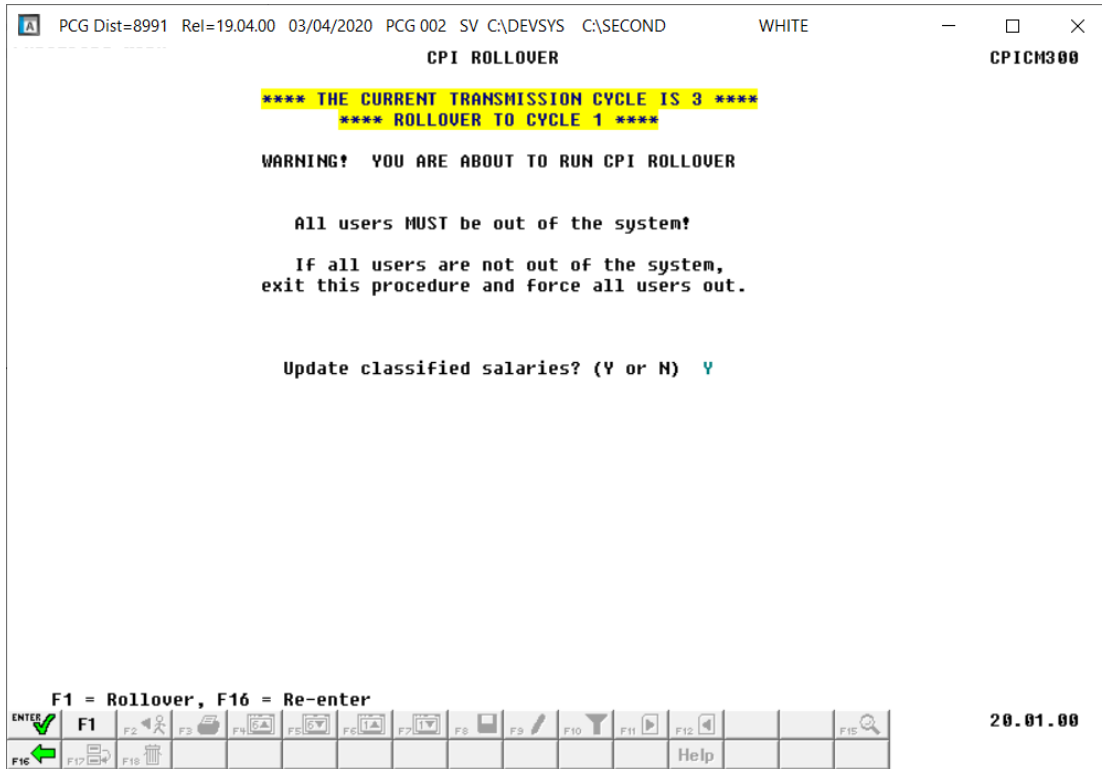
The following screen displays when rolling from CPI Cycle 1 or 2:



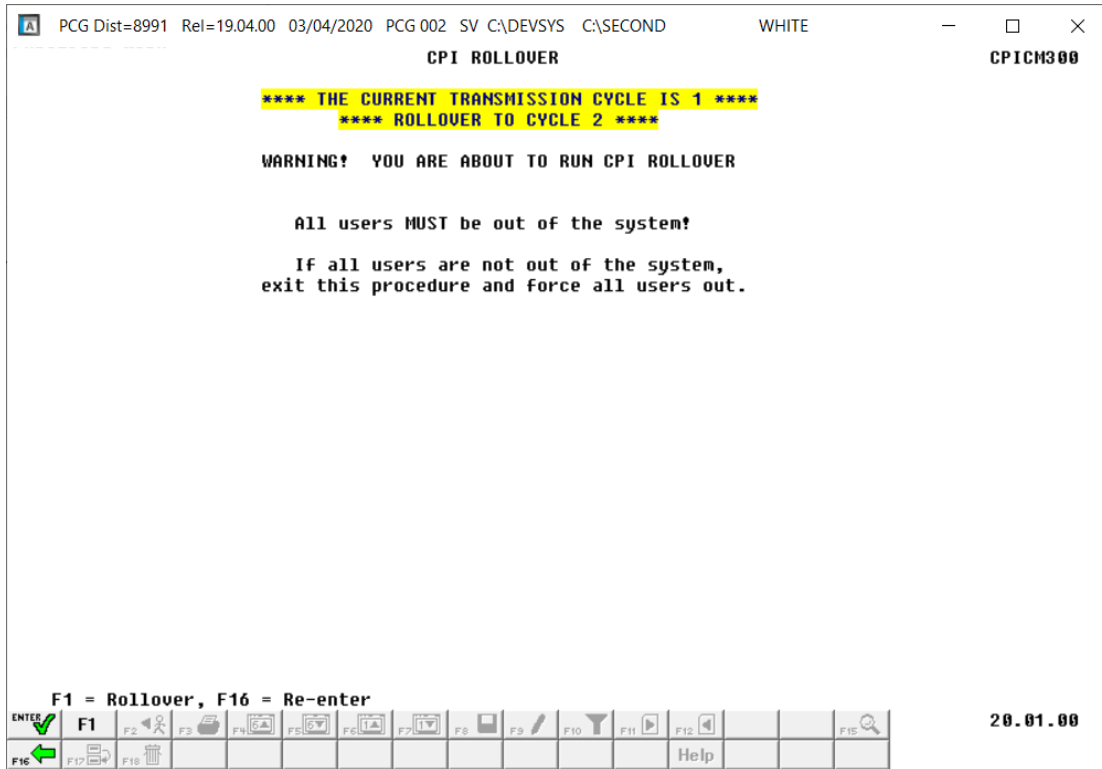
Step	Action
3	Review the information on the <i>Warning!</i> Screen.
4	<b><u>Rollover from Cycle 1 to Cycle 2:</u></b> Proceed to <i>Step 6</i> . <b><u>Rollover from Cycle 2 to Cycle 3:</u></b> Proceed to <i>Step 6</i> .
5	<b><u>Rollover from Cycle 3 to Cycle 1:</u></b> Select the appropriate option for updating classified salaries in the <b>Update classified salaries</b> field. Valid values are ‘Y’ update classified salaries, or ‘N’ do not update classified salaries.  When the ‘ <b>Update classified salaries</b> ’ field is set to ‘Y’, the <b>Annual Classified Salary</b> field on the <i>CPI Biographical Data</i> screen will automatically default to the employee’s <b>Contract Salary</b> amount on the <i>Update/Display Gross Data</i> payroll screen when <b>Classified Employment Basis</b> field is greater than zero <u>and</u> the <b>Certified Employment Basis</b> field equals zero in CPI. If the <b>Certified Employment Basis</b> field is <u>greater than zero</u> , the <b>Annual Classified Salary</b> field will <u>not</u> be updated even if the <b>Classified Employment Basis</b> field is also greater than zero.
6	Select  (ENTER) to validate the screen.



The following screen displays when rolling from **CPI Cycle 3** to **CPI Cycle 1**:

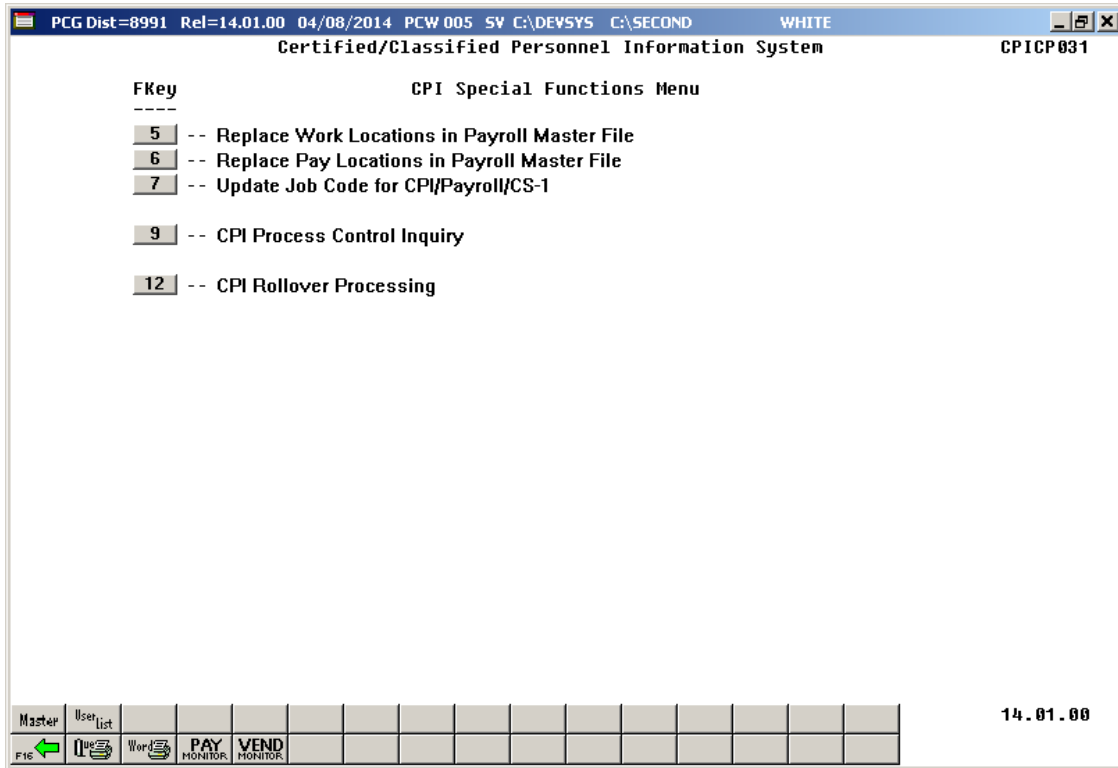


The following screen displays when rolling from **CPI Cycle 1** or **2**:







Step	Action
7	Review the information on the <i>Warning!</i> screen and select <b>F1</b> (F1) to run the CPI Rollover.

The following screen displays:



Step	Action
8	Repeat the procedures to access and screen-print the <i>CPI Process Control Inquiry</i> screen, in <i>Topic 4: Entering the GaDOE Termination Date and Printing the CPI Process Control Inquiry Screen</i> .
9	Verify the following fields have been updated on the <i>CPI Process Control Inquiry</i> screen: <b>Beginning School Year/Ending School Year</b> <b>Last Rollover Cycle</b> <b>Final Transmission Date/Final Trans. Cycle</b> (Final Transmission Cycle) <b>Terminated Employees will be Reported: From Date To Date</b> <i>If the fields require additional updates, contact Technology Management Customer Support Center for assistance.</i>

Step	Action
10	<p><b>To print the report via the Uqueue Print Manager:</b> Select  (Uqueue).</p> <p><b>To print the report via Microsoft® Word:</b> 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>
11	<p>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>.</p>

### 5A. Employee Expired Certificate Information – Example

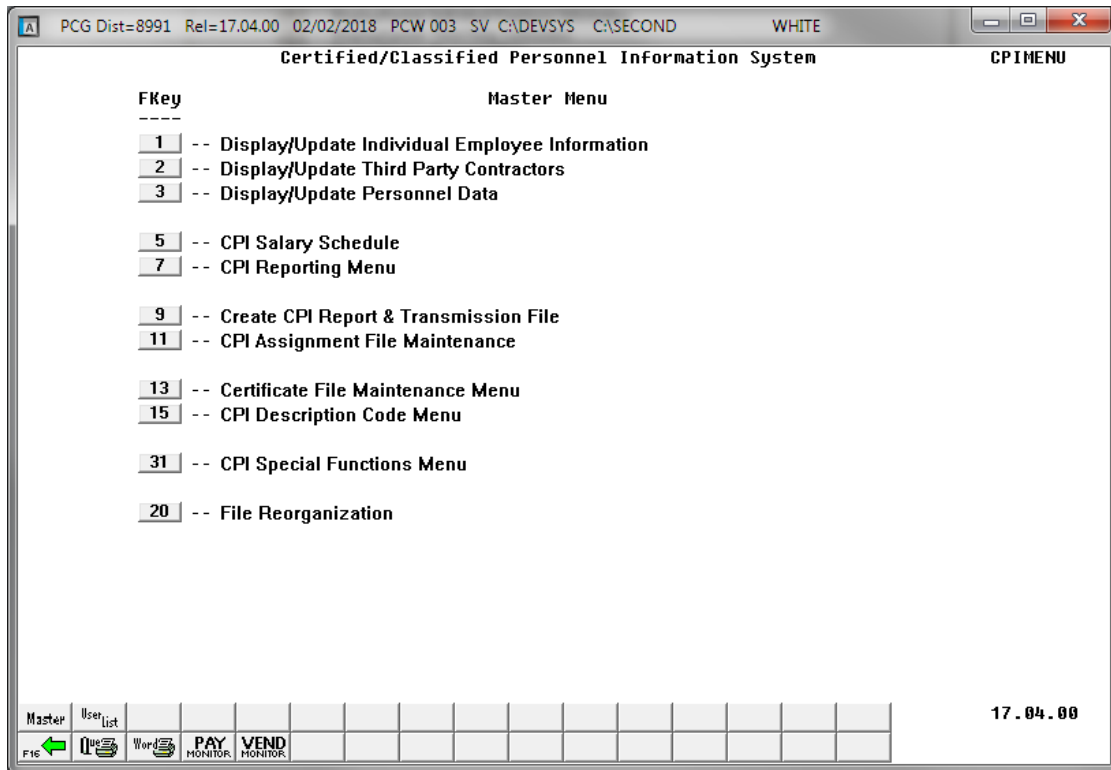
EMP NO	NAME	SSN	CLS	LOC	FIELD CODE/NAME	CERT TYPE	PAR	VALID FROM	TO
088947	BRNK, ROGER	999-08-8947	01	0100	704 EDUCATIONAL LEADERSHIP (P-12)	L		07/01/2009	2014
088947	BRNK, ROGER	999-08-8947	01	0100	808 EARLY CHILDHOOD EDUCATION (P-5)	T		07/01/2009	2014
089511	CH2STAIN, CAZLEE	999-08-9511	01	0100	808 EARLY CHILDHOOD EDUCATION (P-5)	T		05/09/2009	2014
089693	GR4SSMAN, WI4EY	999-08-9693	01	0100	808 EARLY CHILDHOOD EDUCATION (P-5)	T		07/01/2009	2014
087613	HA4LOW, PH4NG	999-08-7613	05	0100	709 SCHOOL COUNSELING (P-12)	S		07/01/2009	2014
089971	MA6CUS, EL6ANDA	999-08-9971	01	0100	808 EARLY CHILDHOOD EDUCATION (P-5)	T		07/01/2009	2014
089971	MA6CUS, EL6ANDA	999-08-9971	01	0100	881 GIFTED IN-FIELD	T		06/10/2011	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	704 EDUCATIONAL LEADERSHIP (P-12)	L		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	778 BEHAVIOR DISORDERS (P-12)	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	798 SPED GENERAL CURR P-12 CONSULT	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	808 EARLY CHILDHOOD EDUCATION (P-5)	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	910 SPED MATH COGNITIVE LEVEL P-5	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	920 SPED SCIENCE COG LEVEL P-5	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	930 SPED LANGUAGE ARTS COG LEV P-5	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	941 SPED SOCIAL SCI COG LEV P-8	T		07/01/2009	2014
087584	ME9ER, HO9LIS	999-08-7584	01	0100	950 SPED READING COGNITIVE LEV P-5	T		07/01/2009	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	798 SPED GENERAL CURR P-12 CONSULT	T		03/27/2010	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	805 SPED ADAPTED CURR P-12 CONSULT	T		01/08/2011	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	809 MIDDLE GRADES (4-8)	T		05/16/2009	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	852 CONCENTRATION-SCIENCE	T		05/16/2009	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	854 CONCENTRATION-SOCIAL SCIENCE	T		05/16/2009	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	911 SPED MATH COGNITIVE LEVEL P-8	T		10/15/2011	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	921 SPED SCIENCE COG LEVEL P-8	T		03/27/2010	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	931 SPED LANGUAGE ARTS COG LEV P-8	T		07/01/2011	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	941 SPED SOCIAL SCI COG LEV P-8	T		03/27/2010	2014
088902	AM3DOR, MA3IN	999-08-8902	01	0108	951 SPED READING COGNITIVE LEV 4-8	T		07/01/2011	2014
088278	BE3MAN, NO3UKO	999-08-8278	08	0108	704 EDUCATIONAL LEADERSHIP (P-12)	L		07/01/2009	2014
088278	BE3MAN, NO3UKO	999-08-8278	08	0108	712 TEACHER SUPPORT SPECIALIST	S		07/01/2009	2014
088278	BE3MAN, NO3UKO	999-08-8278	08	0108	743 MATHEMATICS (6-12)	PBT		07/01/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	755 HISTORY (6-12)	T		03/27/2010	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	798 SPED GENERAL CURR P-12 CONSULT	T		12/11/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	809 MIDDLE GRADES (4-8)	T		12/11/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	853 CONCENTRATION-LANGUAGE ARTS	T		12/11/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	854 CONCENTRATION-SOCIAL SCIENCE	T		12/11/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	855 CONCENTRATION-READING	T		12/11/2009	2014
089549	CA4LE, GI4A	999-08-9549	01	0108	881 GIFTED IN-FIELD	T		06/10/2011	2014

## Topic 6: Update Employees' Job Code for CPI/Payroll/CS1

### \*\*\*\*\* ATTENTION \*\*\*\*\*

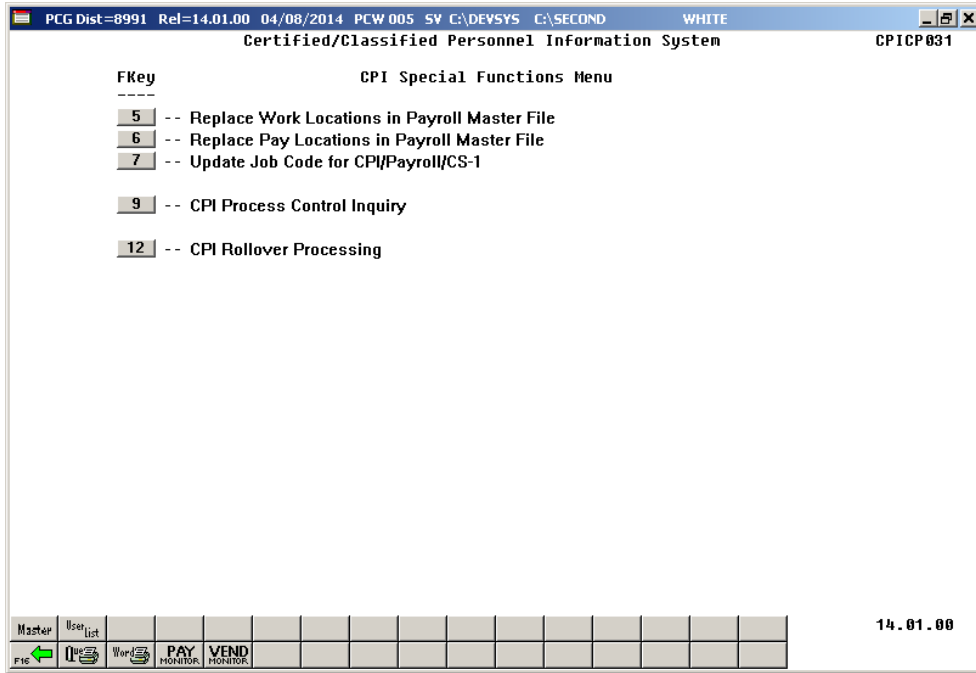
Perform this procedure after the June payroll and before changing Personnel assignments in CPI and Personnel Data for the new school year. The job code indicated as the first CPI assignment will be transferred to the **CS-1 Job (From CPI)** field on the employee's personnel record. PCGenesis transfers the **Current Year Contract Months** field's entry to the **Prior Year Contract Months** field on the employee's personnel record.

The completion of this procedure allows the *CS-1 Salary & Travel Expense Report* and the *Certified/Classified Personnel Information (CPI) Leave Data Transmission File* to be processed. After running this procedure, make further modifications to the employee's CS-1 job code on the employee's Personnel/Payroll Information screen, where appropriate.



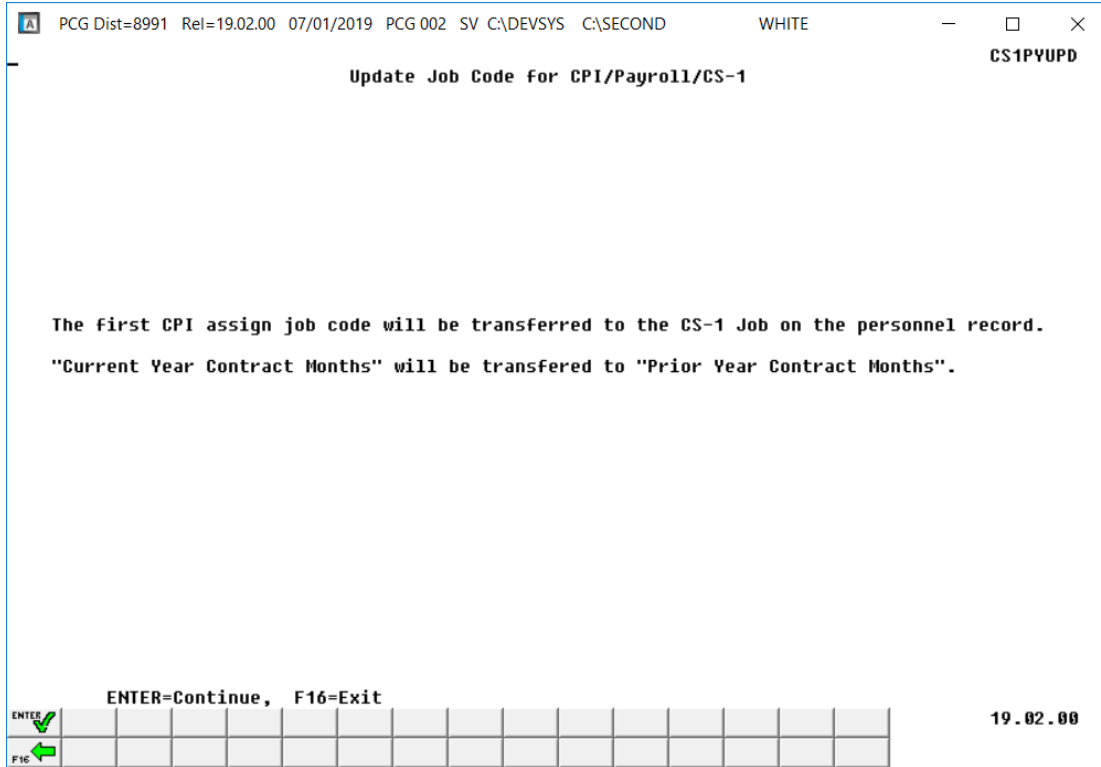
Step	Action
1	Select <b>F31</b> (F31 – CPI Special Functions Menu).




The following screens displays:



Step	Action
2	Select <b>7</b> (F7 – (Update Job Code for CPI/Payroll/CS1).

The following screens displays:



Step	Action
3	<p>Select  (<b>Enter</b>) to update the <b>CS-1 Job (From CPI)</b> field on the employee’s personnel record, and to transfer the <b>Current Year Contract Months</b> field’s entry to the <b>Prior Year Contract Months</b> field on the employee’s personnel record.</p> <p><i>“Updating Payroll File with Job Code” briefly displays.</i></p> <p><i>The CPI Special Functions Menu redisplays.</i></p>
4	<p>Select  (<b>F16 -Exit</b>) to return to the <i>Certified/Classified Personnel Information System Master Menu</i>, or select  (<b>Master</b>) to return to the <i>Business Applications Master Menu</i>.</p>