



PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

1/9/2020

Section B: Payroll Update Processing

***[Topic 2: Add a New Payroll Employee
and Hire a Third-Party Contractor
Employee, V2.21]***

Revision History

Date	Version	Description	Author
1/9/2020	2.21	19.04.00 – Add 2020 W-4 fields.	D. Ochala
02/04/2019	2.20	19.01.00 – Update <i>Procedure D: New Employee Import Process</i> and add Georgia County Code field.	D. Ochala
03/19/2018	2.19	18.01.00 – Add the E-mail Address and Cell Phone Number fields.	D. Ochala
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12/30/2016	2.17	16.04.00 – Update <i>Procedure D: New Employee Import Process</i> and add three new fields: the Hours Per Day field, the ‘No Pension’ Code field, and the Sick Bank field.	D. Ochala
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07/15/2015	2.14	15.02.00 – Add <i>TRS & ERS Pens Gross Adj</i> field back to screen. Add <i>No Pension Code</i> field.	D. Ochala
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03/31/2009	2.5	09.01.00 – Added Data Collection ethnicity code information and instructions, and <i>Procedure C: Adding a New Third Party Contractor Employee</i> .	C. W. Jones
10/02/2008	2.4	08.04.00 – Added <i>TRS-Pension Switch ‘R’</i> and <i>DOE Paid ERCON</i> field edit information and instructions.	C. W. Jones
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06/02/2008	2.2	08.02.00 – Added pension code ‘0’ (No Pension Participation) and TRS ‘R’ (TRS: Employer Pays BOTH employer and employee shares – SB327) code entry information and instructions.	C. W. Jones
03/25/2008	2.1	08.01.00 – Added <i>Annuity 3 – Annuity 5</i> information and screenshot example.	C. W. Jones
09/25/2007	2.0	07.03.00 – Added GHI option and tier drop-down selection icon  information and instructions.	C. W. Jones

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Overview

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

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

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

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

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

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

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

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

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

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

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

GHI Change Code/GHI Change Date Fields: The GHI change code and change date fields track employee changes impacting GHI processing. PCGenesis defaults to *NEMP (New Employee Hire)* for new employee information. PCGenesis exports this information when users create the *GHI Recent Changes to Employee (AUF)* file. Refer to the *Payroll System Operations Guide, Section D: Processing Monthly/Quarterly/Annual/Fiscal Report Processing, Topic 1: Processing Monthly Reports* for the instructions on performing this procedure.

State Exemptions (Allowances): PCGenesis divides exemptions into two separate fields for payroll calculation. PCGenesis users may perform this payroll calculation at different rates for the two allowances where appropriate. These fields include **State Allow Mar[]** to enter the allowances for marital status from *Line 3* of the *G-4* form, and **State Allow Dep[]** to enter the sum of dependent and additional allowances from *Line 4* and *Line 5* of the *G-4* form.

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

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

Screen Print: The screen print feature allows the user to obtain a screen print of selected payroll screens. The screen print feature is available on display/inquiry screens which have the  button. The screen print file will be available in the print queue with the name 'PSCNnnnn'.

Selecting the drop-down selection icon ,  (F15 – Code Lookup) or  (F28 – Help Screens) when offered provides additional assistance with the entry of information.

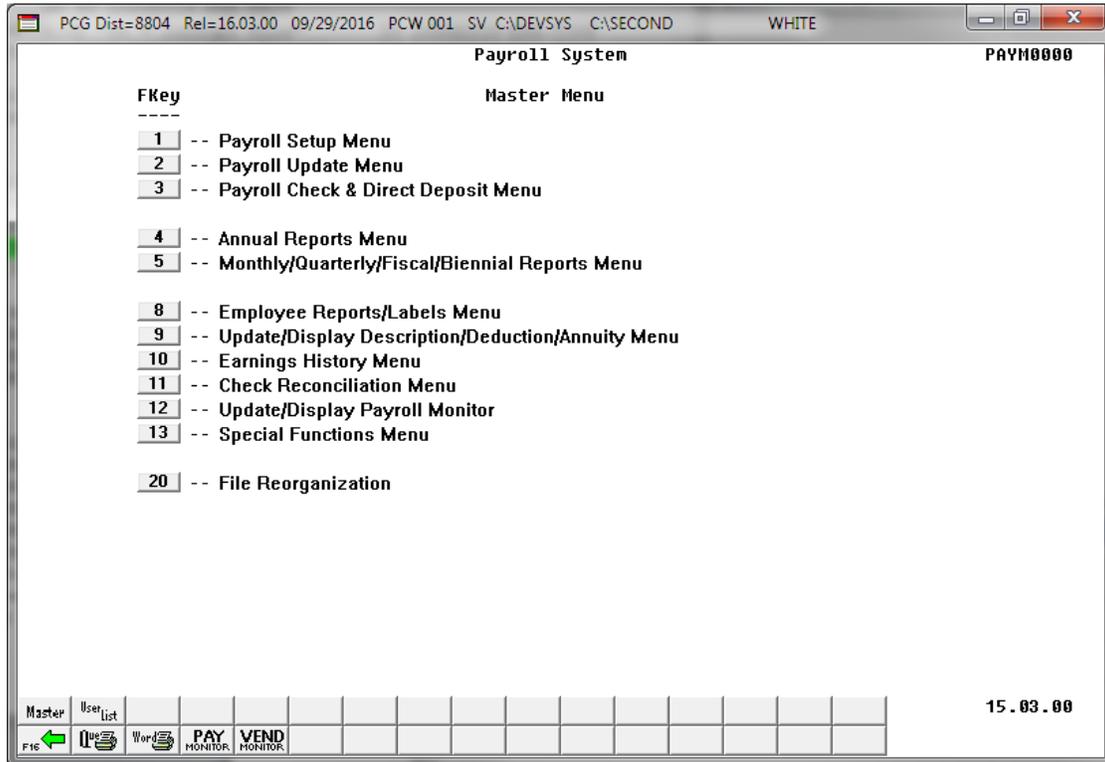
Procedure A: Setting/Clearing Employee Search Criteria

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

Procedure B: Adding a New Payroll Employee

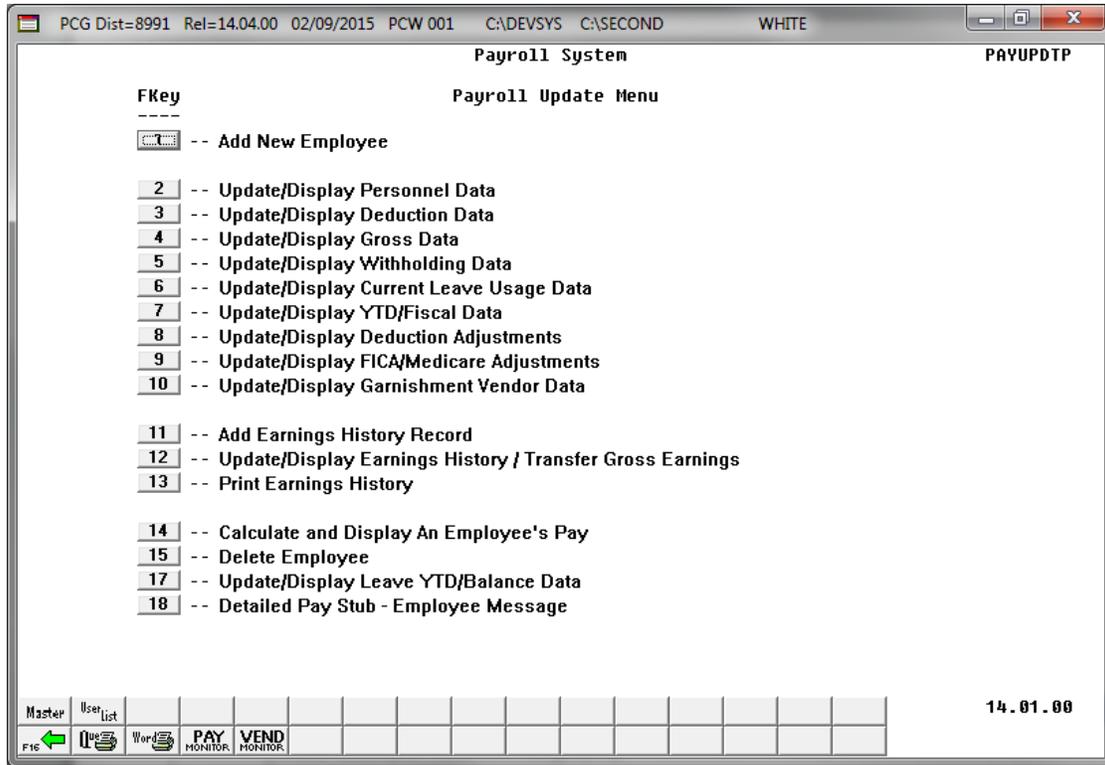
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 2 (F2 - Payroll System).

The following screen displays:



Step	Action
2	Select 2 (F2 - Payroll Update Menu).

The following screen displays:



Step	Action
3	Select 1 (F1 - Add New Employee).

The following screen displays:

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

Step	Action
8	Select  (Enter). Although a certified employee's field entries display in the screenshot examples, the page following also includes the initial entry screen for a classified employee and a certificated substitute employee.

For certified and classified employees the following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY\ C:\SECOND WHITE

Add New Employee PAY01

Status **A** -- Active
 Emp. no. 12121 Pay Loc 101 Location 000101 **Class 1 CLASSROOM TEACHERS**
 Sex Code - Work Loc Job
 Mar Stat - SSN 000 00 0000 EE0-5 Job 000
 Ethnic -

NAME First _____ Middle _____
 Last _____ Suffix _____ Prefix _____

Address _____ Certificate Type _____
 Address L2 _____ CS1 Job (from CPI) 000
 City/State _____, _____ Include on CPI ? Y
 Zip Code _____ County 000 Sick Bank ? N
 Phone () 000-0000 Substitue rank -
 Cell phone () 000-0000 Hours Per Day _____

Birth Date _____ GHI Eligible ? Y Participate in GHI ? -
 Hire Date _____ **GHI BOE Trans? D** GHI Option NC
 Rehire Date _____ GHI 1st day wrk _____ GHI Tier 00
 Term Date _____ GHI Coverage Start _____ GHI Ded Cd -
 Term Reason - GHI Change Code NEMP

Employee e-mail: _____

19.03.01

ENTER  Help

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

The screenshot shows the 'Add New Employee' screen with the following details:

- Status: A -- Active
- Emp. no.: 12121
- Pay Loc: 101
- Location: 000101
- Class: 3 SUBSTITUTE TEACHER (circled in red)
- Job: EE0-5 Job 000
- SSN: 000 00 0000
- Include on CPI?: N (circled in red)
- Sick Bank: ? N
- Substitute rank: ?
- Hours Per Day: -
- GHI Eligible?: N
- GHI BOE Trans?: D
- GHI 1st Day Wrk: -
- GHI Coverage Start: -
- GHI Change Code: NEMP
- Participate in GHI?: -
- GHI Option: NC
- GHI Tier: 00
- GHI Ded Cd: -

Step	Action
9	Verify or enter A (Active) or enter T (Terminated), or I (Inactive) in the Status field to identify the employee’s status, where appropriate.
10	Enter F (Female) or M (Male) in the Sex Code field to identify the employee’s gender.
11	Enter the location code or select the drop-down selection icon  in the Work Loc (Work Location) field to choose the employee’s primary work location code.
12	Enter the code or select the drop-down selection icon  in the Job field to choose the employee’s job classification.
13	Enter M (Married) or S (Single) in the Mar Stat (Marital Status) field.
14	Enter the employee’s social security number in the SSN (Social Security Number) field. <i>If the employee’s social security number is unknown at the time the employee’s record is created, enter all nine’s (999-99-9999) in the field temporarily. Enter the employee’s actual social security number in the SSN (Social Security Number) field before W2 calendar year-end processing however. PCGenesis automatically updates this information for the employee’s earnings history information.</i>

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

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

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

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

Step	Action
45	<p>GHI Option field - Required if the Participate in GHI? field is set to 'Y'.</p> <p>Using the SHBP's supporting documentation for the current year, enter or select the drop-down selection icon  in the field to choose the employee's health plan code.</p> <p><i>PCGenesis defaults this entry to NC (Waived Coverage).</i></p> <p><i>While not included in the Add New Employee procedure, PCGenesis automatically enters the GHI deduction amount for the GHI deduction code on the employee's Deduction screen. The Update/Display Deduction Data screen is accessed by selecting F3 (Update/Display Deduction Data) from the Payroll System – Payroll Update Menu.</i></p>
46	<p>GHI Tier field - Required if the Participate in GHI? field is set to 'Y'.</p> <p>Enter or select the drop-down selection icon  in the field to choose the employees' level of coverage (tier) code.</p> <p><i>PCGenesis defaults this entry to 00 (SHBP Waived).</i></p>
47	<p>GHI Ded Cd (GHI Deduction Code) field - Required if the Participate in GHI? field is set to 'Y'.</p> <p>Enter or select the drop-down selection icon  in the field to choose the deduction code.</p> <p><i>An invalid entry in this field will generate the "Deduction Code not valid or not set up as SHBP Deduction" message. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions on the entry of this code.</i></p>
48	<p>Enter the employee's e-mail address in the Employee e-mail field. The e-mail address must contain one '@' sign.</p>
49	<p>Select  (Enter) to validate the screen's entries.</p>

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY\ C:\SECOND WHITE

Add New Employee PAY01

Status A -- Active GARLAND, JUDY P.
 Emp. no. 98989 Pay Loc 101 Location 000101 Class 5 SCHOOL COUNSELORS
 Sex Code E Work Loc 101 Location 000101 Job 2 TEACHER 1-3
 Mar Stat S SSN 989 89 8989 EEO-5 Job 000 Undefined
 Ethnic 2 WHITE

NAME First JUDY Middle P.
 Last GARLAND Suffix _____ Prefix MS.

Address 1 WEST FIRST ST Certificate Type _____
 Address L2 APT 1 CS1 Job (from CPI) 000
 City/State ATLANTA, GA Include on CPI ? Y
 Zip Code 30000 County 009 Sick Bank ? N
 Phone (777)888-9999 Ben Hill Substitute rank _____
 Cell phone ()000-0000 Hours Per Day 8.000

Birth Date 1/01/1970 GHI Eligible ? Y Participate in GHI ? Y
 Hire Date 1/01/2019 GHI BOE Trans? N GHI Option B3 ANTHEM BRONZE
 Rehire Date _____ GHI 1st Day Wrk 1/01/2019 GHI Tier 10 SINGLE
 Term Date _____ GHI Coverage Start 2/01/2019 GHI Ded Cd 9
 Term Reason _____ GHI Change Code NEMP

Employee e-mail: JUDY.GARLAND@DOE.K12.GA.US

Validations passed. Check screen 2 or save your changes.

ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15
 F16 F17 F18 Help 19.03.01

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee - Screen 2 PAY01

Emp. # **98989 GARLAND, JUDY P.** Status **A** Pay Loc **101** Class **5**

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

State **Y** (Y/N) Pens Code **2** TRS Cycle **3** FIS YR

FICA **Y** (Y/N/M) TRS service ind **1** Pens Elig Date **1/01/2019** Contract mo **19**

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

TRS DOE Paid ERCON **-** (Y/N) Pens Amt/% Adj Amt/% Hrs/Week **40.00**

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

Acct #	Yr	Fnd	F	Prgm	Funct	Objct	Fcty	B	Addt'l	Contract	Budget	Flg		
Acct #1	00	-	-	-	-	-	-	-	-	-	-	-	Cycle Gross	5000.00
Acct #2	00	-	-	-	-	-	-	-	-	-	-	-	State Salary	60000.00
Acct #3	00	-	-	-	-	-	-	-	-	-	-	-	Local Salary	
Acct #4	00	-	-	-	-	-	-	-	-	-	-	-	Other	
Acct #5	00	-	-	-	-	-	-	-	-	-	-	-	Contract Amt	60000.00
Totals														

State: Mar Stat **B** Allowance Mar **1** Dep **9** Withholding Code **1** Amt/% **222.22**

Federal: Mar Stat **H** 2020 W-4? **Y** (Y or N) Withholding Code **1** Amt/% **111.11**

W-4 Prior to 2020: Exempt **0**

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

Box 3 Dependent amt **33.33** Box 4b Deduction amt **5555.55**

Participating in GHI, GHI account distributions must add to 100%

19.03.01

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

Step	Action
53	<p>Enter the appropriate code in the Tax Switches: Pension field.</p> <p>Valid values: Y = Calculate pension N = Do NOT calculate pension R = TRS Retiree – Do NOT calculate an employee percentage</p> <p><i>This entry determines the handling of the employee’s pension calculation and the additional TRS/ERS calculation, and overrides the entry in the Pension Code field.</i></p> <p><i>When entering ‘N’ in the Pension Switch, PCGenesis suspends the pension calculation <u>for this employee for the current Payroll Run</u>. This entry neither affects other employees’ pension calculations, nor requires the employee’s pension code to be changed.</i></p> <p><i>When entering ‘Y’ (Yes) in the Pension Switch field, and ‘0’ in the Pension Code field, PCGenesis does not calculate a pension deduction for the employee.</i></p> <p><i><u>For HB210/SB 327 TRS Retirees:</u> Use Pension Switch ‘R’ for rehired TRS retirees. HB210/SB 327 allows retirees to return to work full-time, and requires the employer to pay both the employee’s percentage and the employer’s percentage contribution. When using the code, ensure that the Pension Code field reflects ‘2’ (TRS), the Amt/% field reflects ‘0.00’, and the TRS service ind field reflects ‘1’ (In-Service).</i></p>
54	<p>Enter Y (Yes) or N (No) in the TRS DOE Paid ERCON (Teacher Retirement System-Georgia Department of Education Paid Employer Contribution) field to identify the Georgia Department of Education’s employer-paid contribution to the school district’s retirement plan.</p> <p><i>When the Step 53 - Tax Switches: Pension field’s entry is ‘R’ (TRS: Employer Pays <u>both</u> employer and employee shares), the TRS DOE Paid ERCON (Department of Education pays the Employer’s Contribution) field <u>may not contain Y</u> (Yes) as the two settings are mutually exclusive. Additionally, the TRS DOE Paid ERCON flag may only be set to Y (Yes) when the Step 55 - ‘Pension Code’ field’s entry is 2 (TRS).</i></p>
55	<p>Enter the appropriate code in the Pens Code (Pension Code) field.</p> <p>Valid Values: 0 = No Pension 1 = Old PSERS Participation 2 = TRS Pension Participation 3 = Old ERS Participation 4 = New ERS Participation 5 = New PSERS Participation</p>
56	<p>Enter the appropriate code in the TRS service ind (Indicator) field to define the employee’s Teacher Retirement System (TRS) service credit.</p> <p>Valid values: 0 = No service credit 1 = Service credit earned for the month</p>

Step	Action
57	<p>Enter the code or select the drop-down selection icon  in the No pension code field to choose the reason for no public pension.</p> <p>The No pension code field has been added to support the new <i>Pension Reporting Compliance File</i> required by ERSGA. A valid value must be entered in the No Pension Code field when the employee's Pension Code is set to '0', no pension. If the employee is enrolled in a public pension (Pension Code values of '1' thru '5'), then the No Pension Code value must be '00'.</p>
58	<p>The Pens Amt/% (Amount/Percentage) field is not editable for new employees. PCGenesis will automatically populate the entry based on the PSERS/TRS/ERS tables.</p>
59	<p>TRS/ERS Reporting - Required: Enter the date (MM/DD/CCYY) in the Pens Elig Date (Pension Eligibility Date) to identify when the employee becomes eligible to participate in the TRS or ERS pension plan.</p> <p><i>TRS uses the pension eligibility date to precisely identify when an employee became eligible for their current pension. This is most important for TRS reporting in the case that a PSERS or Substitute employee changes job functions and becomes eligible to enroll in TRS. In this instance, the employee would retain their original hire date, but have a pension eligibility date tied to the date of the change of their job role.</i></p>
60	<p>Enter the dollar amount <u>or</u> percentage in the TRS / ERS Pens Gross Adj Amt/% (Teacher Retirement System Pension Gross Adjustment Amount/Percentage) field where appropriate.</p> <p>The TRS / ERS Pens Gross Adj Amt/% field is needed by some districts who do not participate in Social Security for many classes of employees. In certain cases, the district's board of education can vote to contribute a certain percentage (for example, 4%) on all classes of employees to a reputable 403(b) in lieu of Social Security. Therefore, the salary reported to TRS can be increased by this percentage as a supplement type for employees. For example: Employee 'A' has a gross salary of \$4,000 per month, but is reported to TRS as \$4,160 (which includes the 4%). The TRS / ERS Pens Gross Adj Amt/% field allows PCGenesis to increase the TRS/ERS reported wages by the 4%. According to the <i>TRS Employer's Reference Guide</i>, a tax sheltered annuity plan is listed as other earnable compensation.</p>
61	<p>The Pay Sch. # (Payroll Schedule Number) field is not editable in PCGenesis.</p> <p><i>PCGenesis automatically populates this entry based on the employee's pay class.</i></p>
62	<p>Enter the appropriate code in the Cycle field to define the manner in which year-to-date (YTD) figures will accrue on the employee's pay stub.</p> <p>Valid Values:</p> <ul style="list-style-type: none"> 1 = Calendar Year 2 = School Year 3 = Fiscal Year
63	<p>Enter the total number of contract months the employee <u>works</u> in the Contract mo (Contract Months) field.</p>

Step	Action
64	Enter the total number of contract months the employee worked in the <u>prior year PY contmo</u> (Prior Year Contract Months) field.
65	<p>Hrs/Week: Required for State Health Benefit Plan (SHBP)/Georgia Health Insurance (GHI) Report and Extract File Creation. For more information, refer to <i>Section D: Monthly/Quarterly/Annual/ Fiscal Report Processing, Topic 1: Processing Monthly Reports.</i></p> <p>Enter the number of hours per week the employee works in the Hrs/Week (Hours per Week) field.</p>
Complete Steps 66 - 78 for each Proc Type entered in Step 66.	
66	<p>Enter the processing line type or select the drop-down selection icon  in the Proc Type (Processing Type) field to identify the processing type.</p> <p>Valid Values: D = Regular daily with pension and taxes H = Regular hourly with pension and taxes S = Regular salary with pension and taxes</p>
67	<p>Pay Type: Optional. Used only for the new detailed pay stub.</p> <p>Enter the pay type or select the drop-down selection icon  in the Pay Type field to define the employee's pay type.</p> <p>The new detailed check stub contains a new section of data entitled <i>Current Hours and Earnings</i>. The current earnings will print based upon the Pay Type entered for the gross data line. The <i>Current Hours and Earnings</i> section on the detailed check stub will list the pay type descriptions, along with the pay rates, regular and overtime hours, regular and overtime pay, and contract amounts.</p> <p>In order to get a proper breakdown of the earnings, users will need to categorize their employees' Gross Data earnings by Pay Type before utilizing the new detailed pay check statement. All gross data lines with the same Pay Type and Pay Rate will be summarized (and accumulated) on ONE earning line on the check stub.</p> <p>The pay types are user-defined. Detailed instructions for setting up Pay Type codes are in the Payroll System Operations Guide, Section F. – Description/Deduction/Annuity File Processing.</p> <p>NOTE: The names <i>Pay Type</i> and <i>Compensation Type</i> are used interchangeably. The codes used to define Pay Type on the <i>Update/Display Gross Data</i> screen are called Compensation Type (code 'P') on the <i>Maintain Description Records</i> screen. The Pay Type table is defined in the <i>Description File</i> under 'P – Compensation Type'.</p> <p><i>The defaulting entry '0000' prints as 'Regular Pay' on the detailed check stub.</i></p>
68	<p>Enter the employee's pay rate in the Pay Rate field, where applicable.</p> <p><i>If entering 'D' or 'H' in the Proc Type field, also make an entry in the Pay Rate field.</i></p>

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

Step	Action
76	<p>Contract: Optional for pay tracking.</p> <p>Enter the employee's gross salary amount that is going towards the employee's annual contract salary in the Contract field.</p> <p>Use this field to track an employee's pay to help prevent over payments. The system is checking each pay cycle to see if the Current Contract Amount (entered here for each individual account line), plus the contents of the correct field on the <i>Update/Display YTD/Fiscal Data</i> screen have exceeded the Contract Amount input at the bottom of the <i>Gross Data</i> screen in <i>Step 83</i>.</p> <p>In order to determine the contract period, PCGenesis uses the Cycle field (<i>Step 62</i>) on the employee record. If Cycle is 1, the system uses the YTD Contract Amount on the <i>Update/Display YTD/Fiscal Data</i> screen to determine contract over payments; if this field is 2, the system uses the School Contract Amount and if the field is 3, the system uses the Fiscal Contract Amount.</p>
77	<p>The Budget Flg (Budget Flag) field on each account line determines what formulas are applied to generate new salary amounts in the budget SANDBOX directory. The Budget Flag field is used with the <i>PCGenesis Budget System</i>.</p> <p>Valid values for the Budget Flag are as follows:</p> <p>A = Move the account number over to the budget, but do NOT bring over any amounts.</p> <p>L = Budget as a local supplement/extra salary. Apply either an amount or percent increase or decrease to the line salary or the line rate.</p> <p>M = Move the account line over to the budget, but do NOT apply any increase or decrease to the line amount.</p> <p>N = Budget as state salary, but do <u>not</u> apply a salary schedule. Apply either an amount or percent increase or decrease to the line salary or the line rate. (Usually used for non-certified employees)</p> <p>S = Budget as state salary using the state CPI salary schedule. (Used for the 'S' account lines of certified employees only)</p> <p>T = Budget as local supplement using a <u>local</u> salary schedule. (Used for the 'S' account lines of certified employees only)</p> <p>X = Do not bring the account line over to the budget process. (Generally used for substitute pay, etc.)</p> <p>spaces = Do not bring the account line over to the budget process.</p>
78	<p><u>If there are additional Proc Types:</u> Select the Tab key to access the next Proc Type field and repeat this procedure at <i>Step 66</i>.</p>
79	<p>Enter the employee's cycle gross salary in the Cycle Gross field.</p> <p><i>Enter Certified employees' cycle gross information in the Cycle Gross field.</i></p>

Step	Action
80	Enter the employee's State of Georgia-funded annual salary in the State Salary field.
81	Enter the employee's locally funded annual supplement in the Local Salary field.
82	Enter the employee's annual salary received in addition to State of Georgia and local supplements in the Other field.
83	<p>Enter the employee's annual contract amount in the Contract Amt (Contract Amount) field.</p> <p>Use this field to track an employee's pay to help prevent over payments. The system is checking each pay cycle to see if the Current Contract Amount (entered for each individual account line in <i>Step 76</i>), plus the contents of the correct field on the <i>Update/Display YTD/Fiscal Data</i> screen have exceeded the Contract Amount input here.</p> <p>In order to determine the contract period, PCGenesis uses the Cycle field (<i>Step 62</i>) on the employee record. If Cycle is 1, the system uses the YTD Contract Amount on the <i>Update/Display YTD/Fiscal Data</i> screen to determine contract over payments; if this field is 2, the system uses the School Contract Amount and if the field is 3, the system uses the Fiscal Contract Amount.</p>
84	<p>Verify or enter the employee's state income tax marital status code in the State: Mar Stat (State: Marital Status) field.</p> <p>Valid Values:</p> <ul style="list-style-type: none"> A = Single B = Married Filing Joint, both spouses working C = Married Filing Joint, one spouse working D = Married Filing Separate E = Head of Household 8 = Exempt – Servicemembers Civil Relief Act <p>A marital status of '8' will cause all wages to be exempt from reporting for Georgia state wages, and will cause zero Georgia tax to be withheld from the employee's paycheck. The <i>Department of Labor Quarterly Payroll Report and Wages Data File</i>, and the W-2 forms will both treat any wages on the Earnings History records with a Georgia marital status of '8' as Georgia exempt wages, and these wages will not be included in these tax reports.</p>
85	<p>Verify or enter the total number of marital allowances from Line 3 of the G-4 form in the State: Allowance Mar (State: Marital Allowance) field.</p> <p>Verify or enter the sum total of both dependent allowances (Line 4 of the G-4 form) and additional allowances (Line 5 of the G-4 form) in State: Allowance Dep (State: Dependent Allowance) field.</p> <p><i>When the number of State of Georgia income tax exemptions exceeds fourteen (14), submit the employee's G-4 form to the Georgia Department of Revenue. Refer to Line 4 and Line 5 of the G-4 form for State: Allowance information.</i></p>

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

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEV\SVS C:\SECOND WHITE

Add New Employee - Screen 2

Emp. # 98989 GARLAND, JUDY P. Status A Pay Loc 101 Class PAY01
Switches: Federal Y (Y/N) Pay Sch. # 5
State Y (Y/N) Pens Code 2 TRS Cycle 3 FIS YR
FICA Y (Y/N/M) TRS service ind 1 Pens Elig Date 1/01/2019 Contract mo 10
Pension Y (Y/N/R) No pension code 00 TRS/ERS Pens Gross PY contmo 00
TRS DOE Paid ERCON - (Y/N) Pens Amt/% .0600 Adj Amt/% Hrs/Week 40.00

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

Acct #	Yr	Fnd	F	Prgm	Fnct	Objct	Fcty	B	Addt'l	Contract	Budget	Flg	Cycle	Gross
Acct #1	20	100	-	1011	1000	11000	195	1						5000.00
Acct #2	00													60000.00
Acct #3	00													
Acct #4	00													
Acct #5	00													60000.00
Totals														

State: Mar Stat B Allowance Mar 1 Dep 0 Withholding Code 1 Amt/% 222.22
Federal: Mar Stat H 2020 W-4? Y (Y or N) Withholding Code 1 Amt/% 111.11

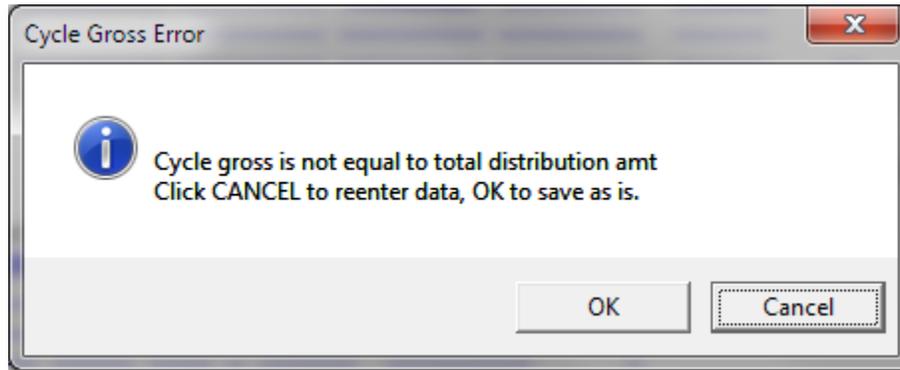
W-4 Prior to 2020: Exempt 0
New 2020 W-4: Box 2 Two jobs flag Y Box 4a Other income 44.44
Box 3 Dependent amt 33.33 Box 4b Deduction amt 5555.55

Validations passed. Check screen 1 or save your changes.

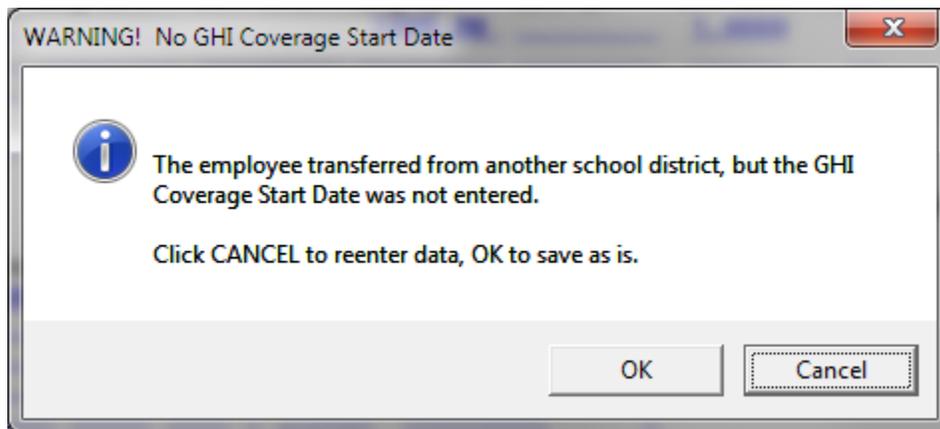
19.03.01

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

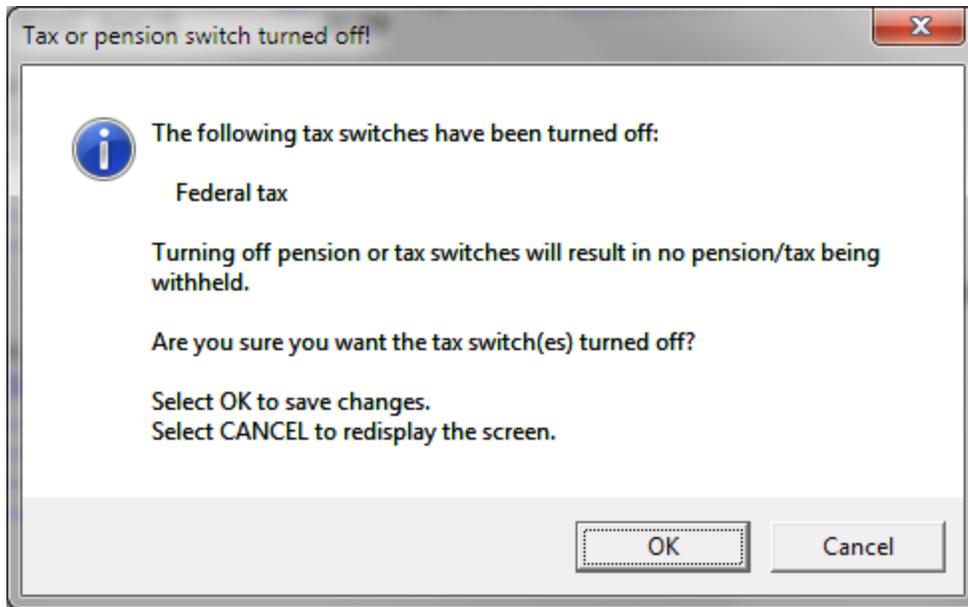
If the cycle gross is not equal to the total gross distribution amount, the following warning dialog box displays:



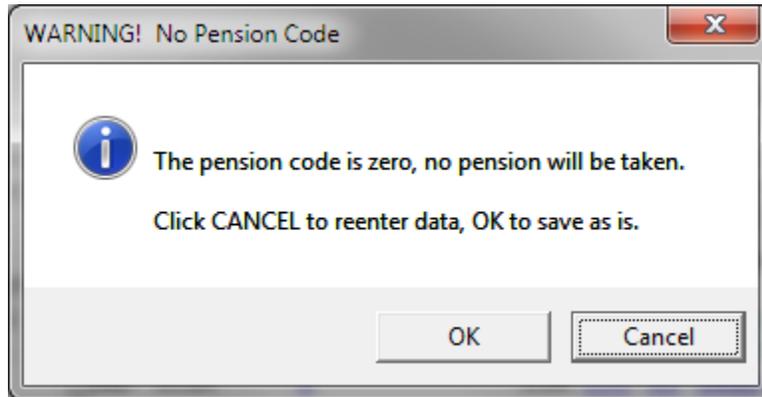
If the employee transferred from another school district (**GHI BOE Trans?** field equals ‘Y’) but the **GHI Coverage Start** date is blank, the following warning dialog box displays:

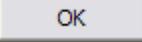
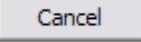


If the Federal tax switch, the State tax switch, or the Pension switch is set to ‘N’, a warning dialog box displays. An example of a warning is shown below:



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



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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSYS C:\SECOND WHITE

Add New Employee PAY01

Status **A -- Active**

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

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

NAME First Last Middle Suffix Prefix Race (Select all that apply)
 Am Indian Alaskan
 Black
 White
 Asian
 Hawaiian Pacific

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

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

Employee e-mail: _____

Employee: 098989 GARLAND, JUDY P. was saved.

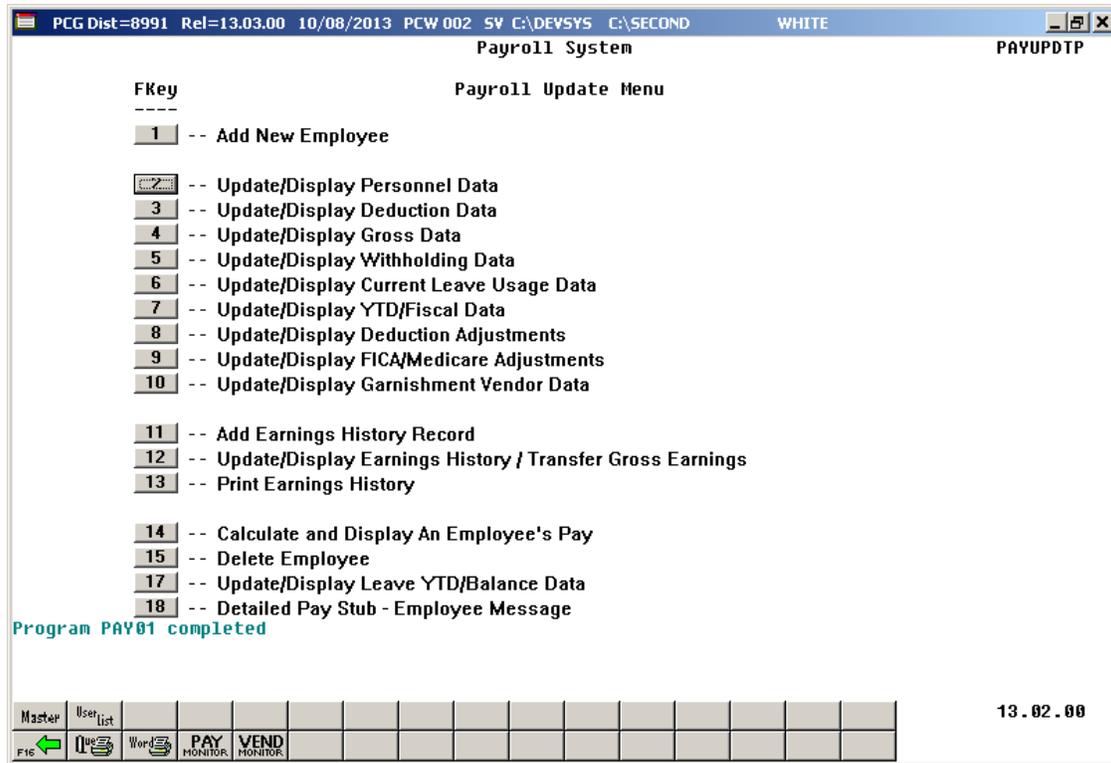
F17=Import new employee data

19.03.01

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

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

The following screen displays:

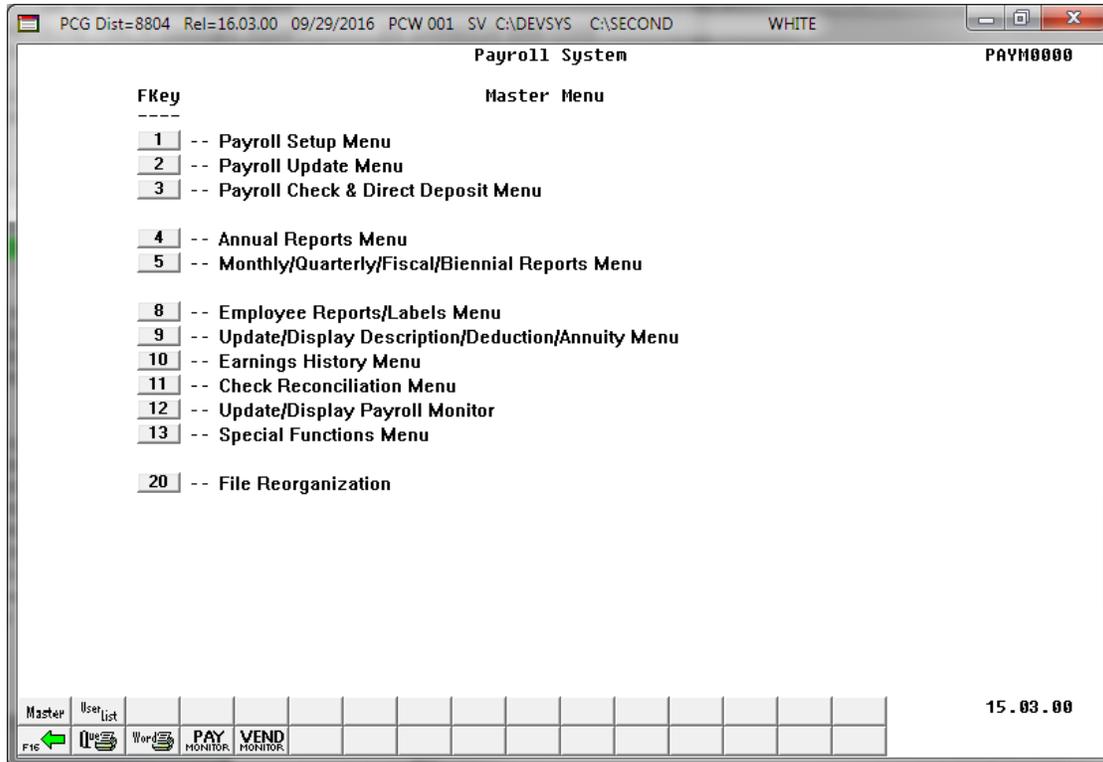


Step	Action
101	Select  (F16 -Exit) to return to the <i>Payroll System Master Menu</i> , or select  (Master) to return to the <i>Business Applications Master Menu</i> .

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

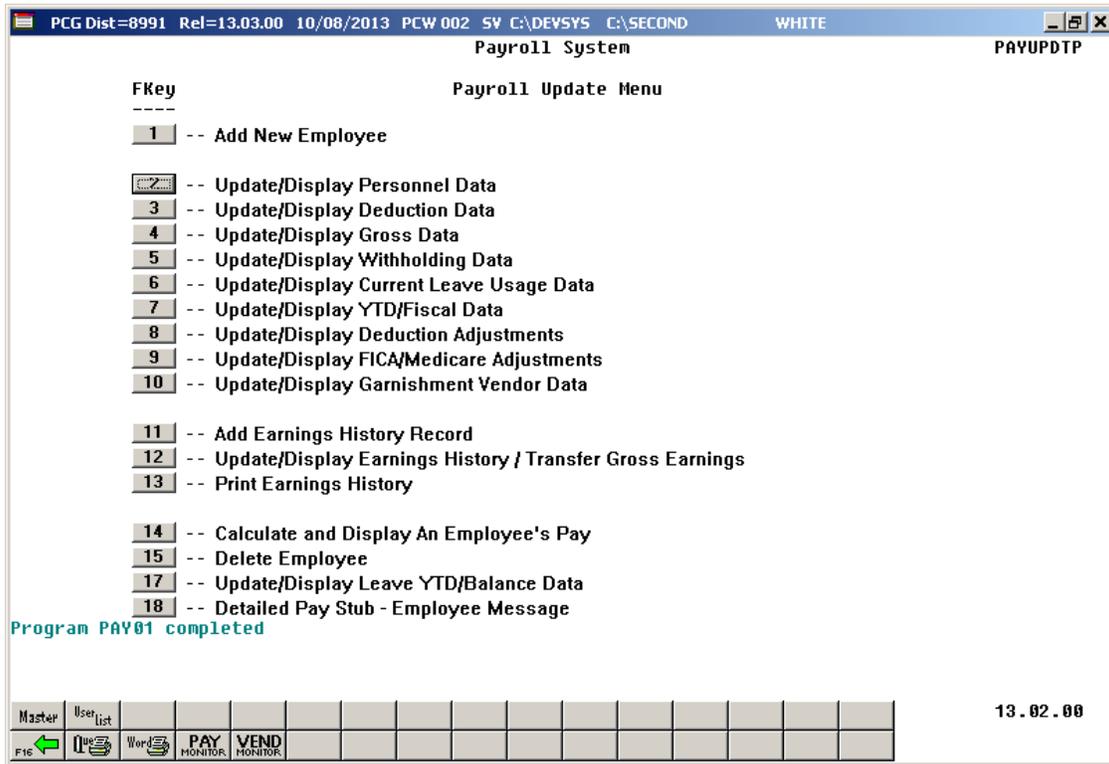
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 2 (F2 - Payroll System).

The following screen displays:



Step	Action
2	Select 2 (F2 - Payroll Update Menu).

The following screen displays:

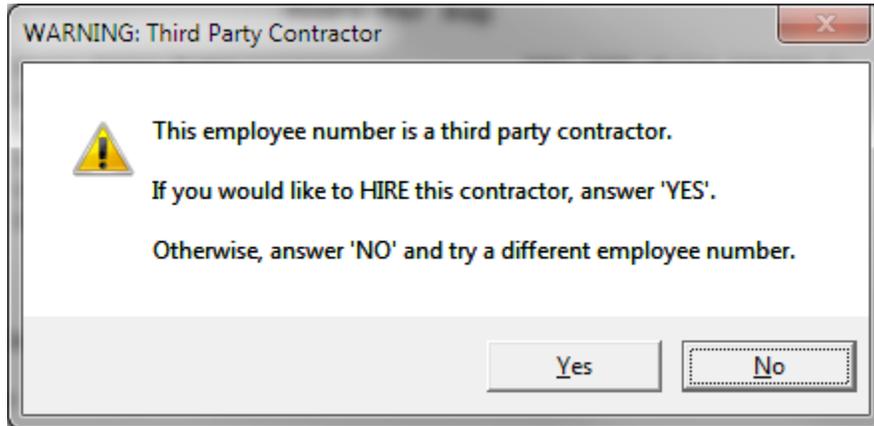


Step	Action
3	Select 1 (F1 - Add New Employee).

The following screen displays:

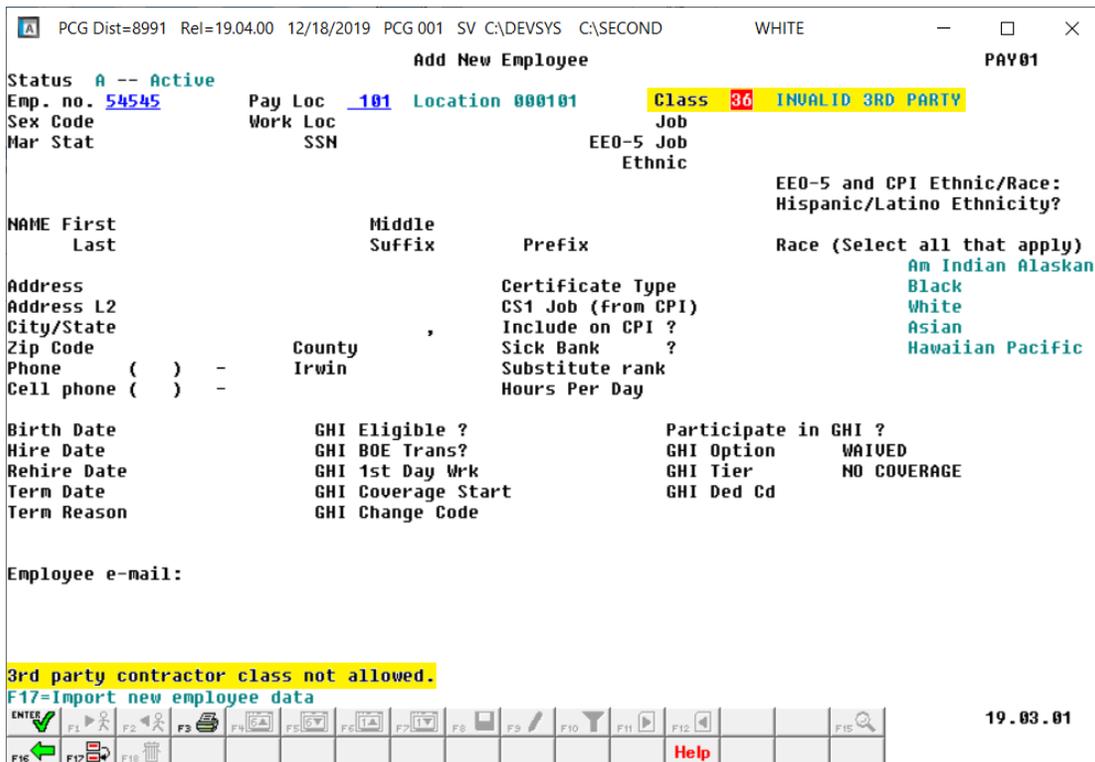
Step	Action
4	PCGenesis automatically defaults to A (Active) in the Status field for all new employee entries.
5	Enter the third-party contractor’s employee number in the Emp. no. (Employee Number) field. <i>The employee number is school district-specific, and must be unique for each employee. Otherwise,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

The following dialog box displays:



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

The following screen displays:



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

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

The following screen displays:

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee PAY01

Status A -- Active **HUDDLE MS, DEBBIE L.**

Emp. no. 54545 Pay Loc 101 Location 000101 Class 1 CLASSROOM TEACHERS

Sex Code F Work Loc 101 Location 000101 Job 2 TEACHER 1-3

Mar Stat S SSN 545 45 4545 EEO-5 Job 000 Undefined

Ethnic 5 ASIAN

NAME First DEBBIE Middle L. EEO-5 and CPI Ethnic/Race:
 Last HUDDLE Suffix MS Prefix _____ Hispanic/Latino Ethnicity?
 Yes No

Address 1 WEST FIRST STREET Certificate Type _____
 Address L2 APARTMENT 2C CS1 Job (From CPI) 000
 City/State ATLANTA, GA Include on CPI ? Y
 Zip Code 30000 County 077 Sick Bank ? N
 Phone (111)222-3333 Irwin Substitute rank _____
 Cell phone (____) 000-0000 Hours Per Day _____

Birth Date 11/01/1980 GHI Eligible ? Y Participate in GHI ? Y
 Hire Date 1/01/2019 GHI BOE Trans? N GHI Option B3 ANTHEM BRONZE
 Rehire Date _____ GHI 1st Day Wrk 1/01/2019 GHI Tier 10 SINGLE
 Term Date _____ GHI Coverage Start _____ GHI Ded Cd 9
 Term Reason _____ GHI Change Code NEMP

Employee e-mail: DEBBIE.HUDDLE@DOE.K12.GA.US

Validations passed. Check screen 2 or save your changes.

ENTER 19.03.01

Help

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee - Screen 2 PAY01

Emp. # 54545 **HUDDLE MS, DEBBIE L.** Status A Pay Loc 101 Class 1

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

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

FICA Y (Y/N/M) TRS service ind 1 Pens Elig Date Contract mo 00

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

TRIS DOE Paid ERCON 1 (Y/N) Pens Amt/% Adj Amt/% Hrs/Week 0.00

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

Acct #	Yr	End	F	Prgm	Fnct	Objct	Fcty	B	Addt'l	Contract	Budget	Flg	Cycle	Gross
Acct #1	00													
Acct #2	00													
Acct #3	00													
Acct #4	00													
Acct #5	00													
Totals														Contract Amt

State: Mar Stat 1 Allowance Mar 0 Dep 0 Withholding Code 0 Amt/% .00

Federal: Mar Stat 1 2020 W-4? 1 (Y or N) Withholding Code 0 Amt/% .00

W-4 Prior to 2020: Exempt 0

New 2020 W-4: Box 2 Two jobs flag 1 Box 4a Other income 20202.02

Box 3 Dependent amt 20202.02 Box 4b Deduction amt 20202.02

Participating in GHI, GHI account distributions must add to 100%

19.03.01

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee - Screen 2

Emp. # 54545 HUDDLE MS, DEBBIE L. Status A Pay Loc 101 Class PAY01

Switches: Federal Y (Y/N) Pay Sch. # 12
 State Y (Y/N) Pens Code 2 TRS Cycle 3 FIS YR
 FICA Y (Y/N/M) TRS service ind 1 Pens Elig Date 1/01/2019 Contract mo 10
 Pension Y (Y/N/R) No pension code 00 TRS/ERS Pens Gross PY contmo 10
 TRS DOE Paid ERCON (Y/N) Pens Amt/% .0600 Adj Amt/% Hrs/Week 40.00

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

Acct #	Yr	End	F	Prgm	Funct	Objct	Fcty	B	Add'l	Contract	Budget	Flg	
Acct #1	20	100		1011	1000	11000	195	1					Cycle Gross
Acct #2	00												State Salary 50000.00
Acct #3	00												Local Salary
Acct #4	00												Other
Acct #5	00												Contract Amt
Totals													

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

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

Validations passed. Check screen 1 or save your changes.

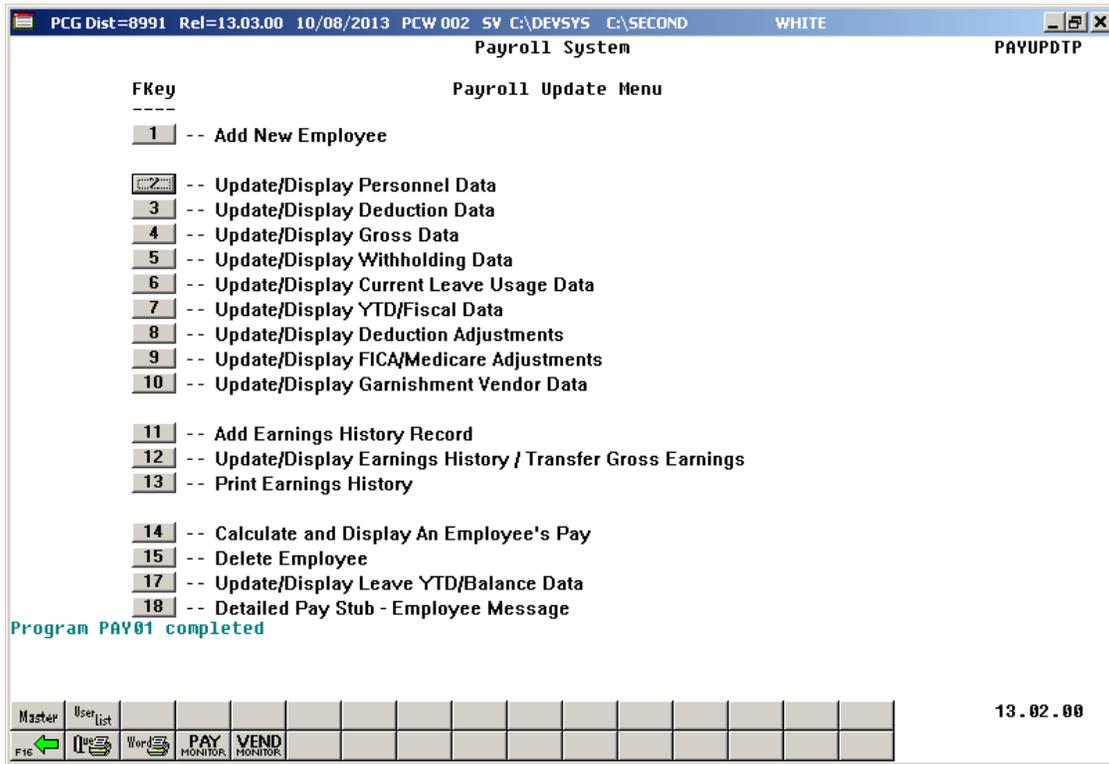
19.03.01

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

The following screen displays:

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

The following screen displays:



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

Procedure D: New Employee Import Process

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

D1. Downloading the PCG_New_One_Employee.xlsx Template

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

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

D1.1. PCG_New_One_Employee.xlsx Template – Example

PCGenesis New Employee Form		v 7.00	
NOTE: Commas may not be entered into any input field.			
All dates must be in MM/DD/CCYY format.			
E1	Employee number	Active/Inactive	(A or I)
E2	Pay location	Work location	Job code
E3		Sick bank	Hours per day
			Class code
			CS1 Job (from CPI)
			Substitute Rank
Name and Address Fields			
N1	Name:	First - Middle - Last	
N2	Name:	Prefix - Suffix	
A1	Addr:	Line 1	
A2	Addr:	Line 2	
A3	Addr:	City - St - Zip	County Code
A4	Addr:	Email	Phone
			Cell Phone
			Digits only. No dashes.
Personnel Fields			
I1	Hire date	Birth date	Gender
	(MMDDCCYY)	(MMDDCCYY)	(M or F)
			Marital status
			(M or S)
I2	Ethnic code	Hispanic	Am Indian Black White Asian Hawaiian CPI?
		(Y or N)	At least one race code must be selected. Valid values are Y or N. (Y or N)
Pension Fields			
P1	Pension switch	Pens eligible date	Pension code
	(Y or N)	(MMDDCCYY)	(0 = None 1 = Old PSERS 2 = TRS 5 = New PSERS)
			Service indicator
			(0 = Out of service 1 = In service)
P2			No Pension code
Tax Fields			
T1	FICA:	Switch	Marital Status
T2	Federal:	W/H code	Additional Withholding Amount/Percent
T3	State:		Exemptions
	(Y or N or M (Fed: SMH (0, 1, 2, 3) (State: A,B,C, D,E,8)	(1 & 2 require amount. 3 requires percentage.)	2020 W-4?
			Marital allow
			Dependent allow
T4	Federal 2020 W-4:	Two jobs?	Depend amount
			Other income
			Deduct amount
Salary Fields			
S1	State salary	Cycle gross	Cycle code
S2	Contract amount	Contract months	(09, 10, 11, or 12) (1 = Calendar Year 2 = School Year 3 = Fiscal Year)
State Health Fields			
H1	GHI eligible?	GHI 1st day worked	Deduction code
H2	Participate?	Coverage Start Date	Option
H3	Hours per week		BOE Transfer
		(MMDDCCYY)	(Y = BOE Transfer N = Not a BOE transfer D = Don't know)

Line Codes – E1, E2, E3, N1, N2, A1, A2, A3, A4, I1, I2, P1, P2, T1, T2, T3, T4, S1, S2, H1, H2, H3

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

D2. Saving the PCG_New_One_Employee.xlsx Template as a Microsoft® Excel Spreadsheet/Workbook

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

The following window displays:

The screenshot shows the Microsoft Excel interface with the 'PCG_New_One_Employee.xlsx' file open. The ribbon is set to 'Home', and the font is Calibri, size 11. The spreadsheet content is as follows:

PCGenesis New Employee Form

*NOTE: Commas may not be entered into any input field.
All dates must be in MM/DD/CCYY format.*

Employee Information: Employee number, Active/Inactive (A or I), SSN, Class code, Pay location, Work location, Job code, CS1 Job (from CPI), Sick bank, Hours per day, Substitute Rank.

Name and Address Fields: Name (First - Middle - Last, Prefix - Suffix), Address (Line 1, Line 2, City - St - Zip), Email, County Code, Phone, Cell Phone.

Personnel Fields: Hire date (MM/DD/CCYY), Birth date (MM/DD/CCYY), Gender (M or F), Marital status (M or S), Ethnic code (Hispanic, Am Indian, Black, White, Asian, Hawaiian), CPI? (Y or N). Note: At least one race code must be selected. Valid values are Y or N.

Pension Fields: Pension switch (Y or N), Pens eligible date (MM/DD/CCYY), Pension code (0 = None, 1 = Old PSERS, 2 = TRS, 4 = New ERS, 5 = New PSERS), Service indicator (0 = Out of service, 1 = In service), No Pension code.

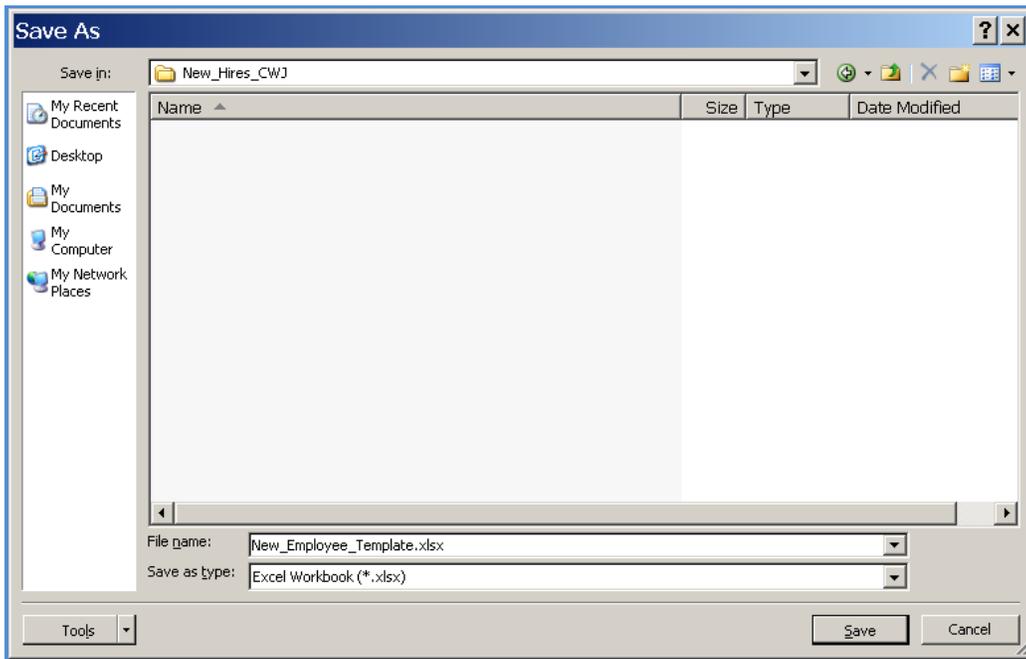
Tax Fields: FICA (Switch, Marital Status, W/H code, Withholding Amount/Percent), Federal (State, Exemptions, Marital allow, 2020 W-4?, Depend. allow), State (Y or N or M) (Fed. SIMM (0, 1, 2, 3) (1 & 2 require amount, 3 requires percentage), Federal 2020 W-4: Two jobs?, Depend amount, Other income, Deduct amount.

Salary Fields: State salary, Contract amount, Cycle gross, Contract months (09, 10, 11, or 12), Cycle code (1 = Calendar Year, 2 = School Year, 3 = Fiscal Year).

State Health Fields: GHI eligible? (Y or N), Participate? (Y or N), Hours per week, GHI 1st day worked, Coverage Start Date (MM/DD/CCYY), Deduction code, Option, BOE Transfer (Y = BOE Transfer, N = Not a BOE transfer, D = Don't know), Tier.

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

The following window displays:



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

D3. Using the PCGenesis Template to Create a New Employee

*****IMPORTANT*****

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

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

The following window displays:

PCGenesis New Employee Form

NOTE: Commas may not be entered into any input field. All dates must be in MM/DD/CCYY format.

Employee number Active/inactive (A or I) SSN Class code
 Pay location Work location Job code CS1 Job (from CPI)
 Sick bank Hours per day Substitute Rank

Name and Address Fields

Name: First - Middle - Last
 Name: Prefix - Suffix
 Addr: Line 1
 Addr: Line 2 County Code
 Addr: City - St - Zip Phone
 Addr: Email Cell Phone
Digits only. No dashes, etc

Personnel Fields

Hire date (MM/DD/CCYY) Birth date (MM/DD/CCYY) Gender (M or F) Marital status (M or S)
 Ethnic code (Y or N) Hispanic Am Indian Black White Asian Hawaiian CPI? (Y or N)
At least one race code must be selected. Valid values are Y or N.

Pension Fields

Pension switch (Y or N) Pens eligible date (MM/DD/CCYY) Pension code Service indicator
(0 = None 1 = Old PERS (0 = Out of service 2 = TRC 4 = New PERS 1 = In service 5 = New PERS No Pension code)

Tax Fields

FICA: Switch Marital Status W/t code Withholding Amount/Percent
 Federal: Exemptions 2020 W-4?
 State: (Y or N or M) (Fed: SMHM (0,1,2,3) (1&2 require amount, 3 requires percentage) Marital allow Dependent allow
(State: A,B,C, D,E,8)

Federal 2020 W-4: Two jobs? Depend amount Other income Deduct amount

Salary Fields

State salary Cycle gross Cycle code (1 = Calendar Year
 Contract amount Contract months (09, 10, 11, or 12) 2 = School Year
 3 = Fiscal Year)

State Health Fields

GHI eligible? (Y or N) GHI 1st day worked Deduction code
 Participate? (Y or N) Coverage Start Date (MM/DD/CCYY) Option Tier
 Hours per week BOE Transfer (Y = BOE Transfer
 N = Not a BOE transfer
 D = Don't know)

Step	Action
Line Code E1 Fields	
3	<p>Enter the employee number in the Emp. no. (Employee Number) field.</p> <p><i>The employee number is school district-specific, and must be unique for each employee. The Employee Number is required, and must be correct and accurate before the export file will load.</i></p>
4	<p>Verify or enter A (Active) or I (Inactive) in the Active/Inactive field to identify the employee's status.</p> <p><i>Note: T (Terminated) is not a valid status code for a new employee, and will cause an error during processing.</i></p>
5	<p>Enter the employee's social security number in the SSN (Social Security Number) field in either of the following two formats:</p> <ul style="list-style-type: none"> • Eleven (11) alphanumeric characters representing the employee's social security number in the format ###-##-#### (with dashes). • Nine (9) digits representing the social security number in the format ##### (without dashes). <p><i>If the employee's social security number is unknown at the time the employee's record is created, enter all nine's (999-99-9999) in the field <u>temporarily</u>. Enter the employee's <u>actual</u> social security number in the SSN (Social Security Number) field <u>before</u> W2 calendar year-end processing. PCGenesis automatically updates this information for the employee's earnings history information.</i></p>
6	<p>Enter the class code in the Class field to choose the employee's pay class.</p> <p><i>The Class code is required, and must be correct and accurate before the export file will load.</i></p>
Line Code E2 Fields	
7	<p>Enter the location code in the Pay Location field to choose the employee's payroll location.</p> <p><i>The Pay Location code is required, and must be correct and accurate before the export file will load.</i></p>
8	<p>Enter the location code in the Work Location field to choose the employee's primary work location code.</p>
9	<p>Enter the job code in the Job Code field to choose the employee's job classification.</p>
10	<p>Enter the employee's CPI job code in the CS1 Job (from CPI) field.</p> <p><i>The GaDOE provides a complete listing of CPI job codes at http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes01.entry_form.</i></p>

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

Step	Action
<i>Line Code A3 Fields</i>	
20	Enter the employee's city in the first field, up to twenty-six (26) characters, and the two-character state code in the second City/State field. <i>Do NOT enter a comma (,) to separate the two entries.</i>
21	Enter the employee's postal code, including the <i>Zip+4</i> postal codes where appropriate, in the Zip code field.
22	Enter the employee's telephone number including the area code, up to ten (10) digits, in the Phone field. Enter digits only, no dashes.
<i>Line Code A4 Fields</i>	
23	Enter the employee's e-mail address, up to fifty (50) characters, in the E-mail field. <i>The e-mail address must contain one '@' sign.</i>
24	Enter the employee's cell phone number including the area code, up to ten (10) digits, in the Cell Phone field. Enter digits only, no dashes.
<i>Line Code I1 Fields</i>	
25	Enter the employee's <u>initial</u> hire date (MM/DD/CCYY) in the Hire Date field.
26	Enter the employee's date of birth (MM/DD/CCYY) in the Birth Date field.
27	Enter F (Female) or M (Male) in the Gender field to identify the employee's gender.
28	Enter M (Married) or S (Single) in the Marital Status field.
<i>Line Code I2 Fields</i>	
29	Enter the ethnic code in the Ethnic Code field to choose the employee's ethnicity. <i>If leaving the field blank, an E (Ethnicity) record containing all zeroes (0's) and the description of "Unspecified" must exist in the payroll Description File.</i>
30	EEO-5 and CPI Ethnic/Race: Enter Y (Yes) or N (No) in the Hispanic field to identify whether or not the employee is of Hispanic descent.
31	EEO-5 and CPI Ethnic/Race: Enter Y (Yes) or N (No) in the appropriate race fields: Am Indian (American Indian), Black , White , Asian , Hawaiian to identify an employee's ethnicity. <i>At least one response must be Y (Yes).</i>

Step	Action
32	Enter Y (Yes) or N (No) in the CPI? field to identify the employee's inclusion in, or exclusion from CPI reporting.
Line Code P1 Fields	
33	Enter the appropriate response or code in the Pension Switch field: Valid entries include Y (Compute Pension), N (Do not Compute Pension), and R (TRS only: Employer pays both employer and employee shares – SB327).
34	Enter the date (MM/DD/CCYY) on which the employee becomes eligible to participate in the school district's retirement plan in the Pens Eligible Date (Pension Eligibility Date) field.
35	Enter the appropriate code in the Pension Code field: Valid entries include 0 (No Pension Participation), 1 (Old PSERS Participation), 2 (TRS Pension Participation), 3 (Old ERS Participation), 4 (New ERS Participation), or 5 (New PSERS Participation).
36	Enter 0 (No Service Credit) or 1 (Service Credit Earned for month) in the Service Indicator field.
Line Code P2 Fields	
37	Enter the code in the No pension code field to choose the reason for no public pension. The No pension code field has been added to support the new <i>Pension Reporting Compliance File</i> required by ERSGA. A valid value must be entered in the No Pension Code field when the employee's Pension Code is set to '0', no pension. If the employee is enrolled in a public pension (Pension Code values of '1' thru '5'), then the No Pension Code value must be '00'.
Line Code T1 Fields	
38	Enter the appropriate response or code in the FICA Tax Switch (Federal Insurance Contributions Act Tax Switch) field: Valid Values: Y = Compute OASDI/Medicare N = Do NOT compute OASDI/Medicare M = Compute Medicare only

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

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

Step	Action
49	<p>Verify or enter the total number of marital allowances from Line 3 of the G-4 form in the State: Marital Allow (State: Marital Allowance) field.</p> <p>Verify or enter the sum total of both dependent allowances (Line 4 of the G-4 form) and additional allowances (Line 5 of the G-4 form) in State: Dependent Allow (State: Dependent Allowance) field.</p> <p><i>When the number of State of Georgia income tax exemptions exceeds fourteen (14), submit the employee's G-4 form to the Georgia Department of Revenue. Refer to Line 4 and Line 5 of the G-4 form for State: Marital Allowance information.</i></p>
Line Code T4 Fields	
50	<p>New 2020 W-4: Two jobs flag. If the 2020 W-4? field value is 'Y', enter 'Y' if the employee has checked the <i>Step 2</i> checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household.</p> <p>Valid Values: Y = <i>Step 2</i> checkbox is checked on the 2020 W-4 N = <i>Step 2</i> checkbox is <u>not</u> checked on the 2020 W-4</p>
51	<p>New 2020 W-4: Depend amount (dependent amount). If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 3</i> of the 2020 W-4 form as the amount claimed for dependents.</p>
52	<p>New 2020 W-4: Other income. If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 4a</i> of the 2020 W-4 form as the amount claimed for other income.</p>
53	<p>New 2020 W-4: Deduct amount (deduction amount). If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 4b</i> of the 2020 W-4 form as the amount claimed for deductions.</p>
Line Code S1 Fields	
54	<p>Enter the employee's State of Georgia-funded annual salary in the State Salary field.</p>
55	<p>Enter the employee's cycle gross salary in the Cycle Gross field. <i>Enter Certified employees' cycle gross information in the Cycle Gross field.</i></p>
56	<p>Enter the appropriate code in the Cycle Code for year-to-date amount accumulations. <i>Valid entries include 1 (Calendar Year), 2 (School Year) and 3 (Fiscal Year).</i></p>
Line Code S2 Fields	
57	<p>Enter the employee's contractual total dollar amount in the Contract Amount field.</p>
58	<p>Enter the total number of contract months the employee <u>works</u> in the Contract Months field. <i>For Contract Months field entries, PCGenesis requires an entry in the Contract Amount field at Step 57.</i></p>

Step	Action
Line Code H1 Fields	
59	<p>GHI Eligible? field (Required for SHBP/GHI reporting): Enter Y (Yes – Employee is eligible to receive benefits) or N (No – Employee is not eligible to receive benefits) in the field to choose the employee’s plan eligibility.</p>
60	<p>GHI 1st Day Wrk (GHI 1st Day Worked) field – Required if the GHI Eligible? field is set to ‘Y’.</p> <p>Enter the first date (MM/DD/CCYY) for which the employee is compensated.</p>
61	<p>GHI Deduction Code field - Required if the Participate in GHI? field is set to ‘Y’.</p> <p>Enter the system deduction code which represents the SHBP/GHI deduction.</p> <p><i>An invalid entry in this field will generate the “Deduction Code not valid or not set up as SHBP Deduction” message. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions on the entry of this code.</i></p>
Line Code H2 Fields	
62	<p>Participate? field (For Classified and Substitute Employees):</p> <p>Enter Y (Yes – Employee participates in SHBP) or N (No – Employee does not participate in the SHBP) to choose the employee’s plan participation.</p> <ul style="list-style-type: none"> • Enter N (No) if the GHI Option field will be NC (No Coverage) or NE (Not Eligible), and the GHI Tier field will be 00 (No Coverage). • Enter Y (Yes) if the employee GHI Option and the GHI Tier fields will be codes other than NC (No Coverage) or NE (Not Eligible), and 00 (No Coverage). <p>Starting July 1, 2012, Direct Billing for certificated employees covered by SHBP takes effect. SHBP moves from a percentage of state-based salaries for every SHBP-<i>eligible</i> certificated employee and instead begins paying a “direct” per member per month (PMPM) rate (i.e., a flat rate) for each certificated employee <i>enrolled</i> in the SHBP. <i>Therefore, an employer contribution will NOT be billed for employees with a GHI Option field of NC (No Coverage) or NE (Not Eligible).</i></p>

Step	Action
63	<p>GHI Coverage Start (GHI Coverage Start Date) field – Optional, but the GHI Eligible? field must be set to ‘Y’.</p> <p>Enter the date (MM/DD/CCYY) when the employee’s GHI benefit coverage starts. The GHI Coverage Start field is an optional field on the screen and is typically used for an employee transferring from another school district.</p> <p>The GHI Coverage Start field is an optional field on the <i>Add New Employee</i> screen. Per instructions from the Georgia State Health Agency, the GHI Coverage Start field should only be used for summer transfers from May 1 through October 31. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. According to the Georgia State Health Agency, the BOE Coverage Start Date field will allow payroll locations to start a transferring employee’s coverage on the exact date selected by the BOE without the date rolling forward an additional month.</p> <p>NOTE: If the GHI BOE Transfer field is set to ‘Y’, but a GHI Coverage Start Date has not been entered, a <u>warning</u> message will be printed on the report.</p>
64	<p>GHI Option field - Required if the Participate in GHI? field is set to ‘Y’.</p> <p>Using the SHBP’s supporting documentation for the current year, enter the employee’s health plan code.</p> <p><i>PCGenesis defaults this entry to NC (Waived Coverage).</i></p> <p><i>While not included in the Add New Employee procedure, PCGenesis automatically enters the deduction amount for the field’s entry on the employee’s Deduction screen. The Update/Display Deduction Data screen is accessed by selecting F3 (Update/Display Deduction Data) from the Payroll System – Payroll Update Menu.</i></p>
65	<p>GHI Tier field - Required if the Participate in GHI? field is set to ‘Y’.</p> <p>Enter the employees’ level of coverage (tier) code (##).</p> <p><i>PCGenesis defaults this entry to 00 (SHBP Waived).</i></p>
Line Code H3 Fields	
66	<p>Hours / Week: Required if the Participate in GHI? field is set to ‘Y’.</p> <p>Enter the number of hours per week the employee works in the Hours/Week field.</p>

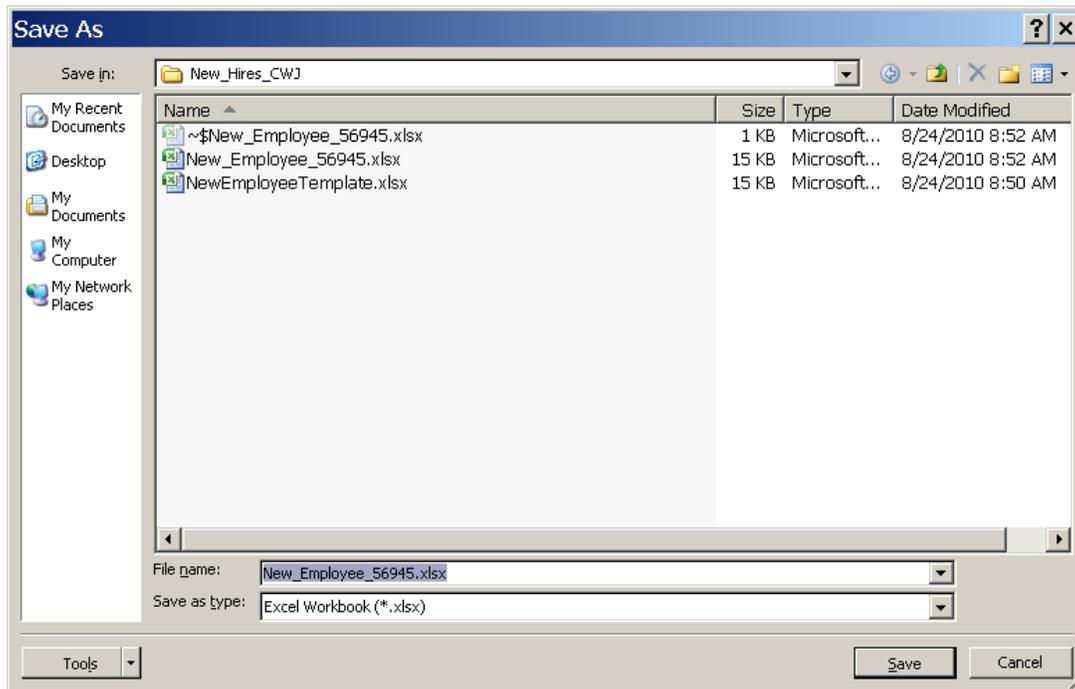
Step	Action
67	<p>GHI BOE Trans? (GHI Board of Education Transfer) field – Required if the GHI Eligible? field is set to ‘Y’.</p> <p>Indicate whether or not the employee transferred from another school district.</p> <p>Valid values:</p> <ul style="list-style-type: none"> Y – Yes, the employee transferred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

D4. Modifying and Saving the PCG_New_One_Employee.csv File in Microsoft® Excel

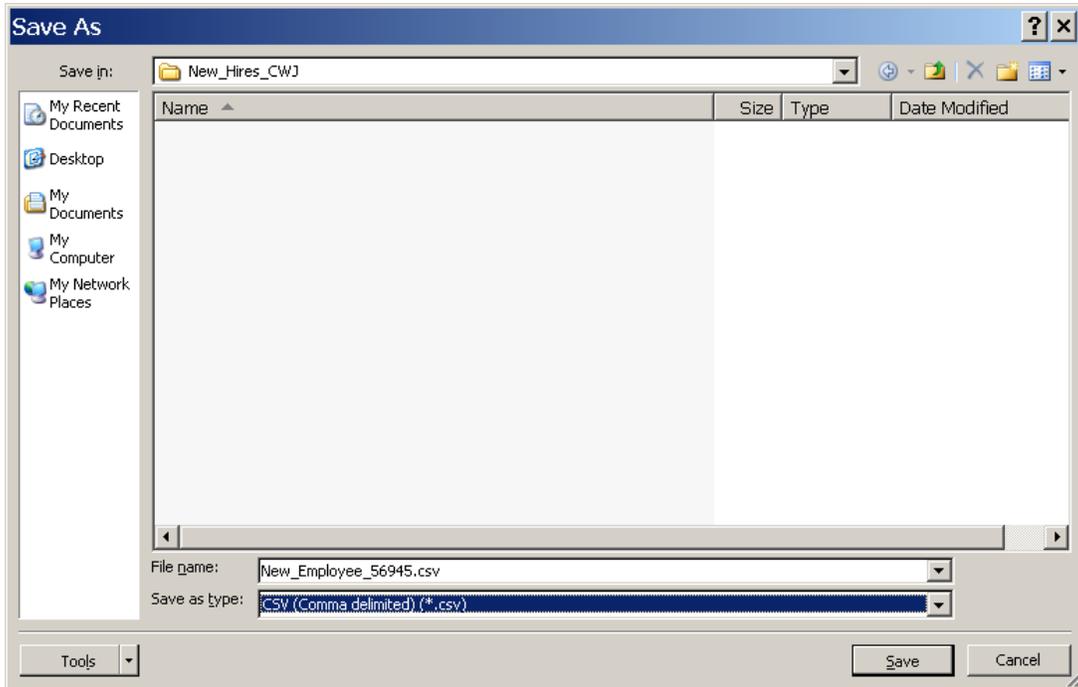
Saving the Microsoft® Excel spreadsheet/workbook as a comma-delimited (.csv) file allows PCGenesis to read the NewEmployeeTemplate.xlsx template's data.

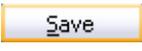
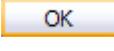
Step	Action
1	Access the Microsoft® Excel spreadsheet/workbook saved in D3. Using the PCGenesis Template to Create a New Employee.
2	From the <i>Menu Bar</i> , select File → Save As .
3	Within the Save in: field, navigate to the New_Hires_CWJ or to the appropriate file location.

The following window displays:

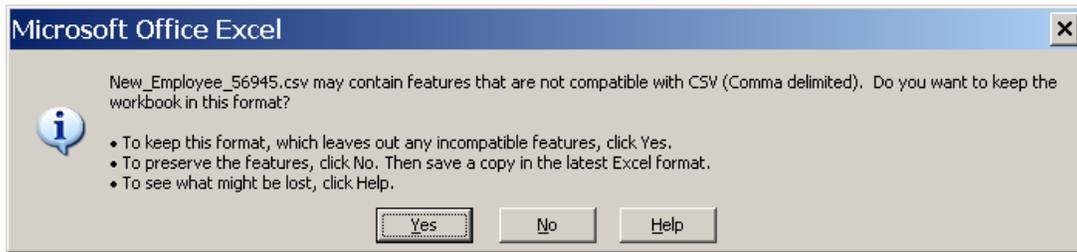


Step	Action
4	Select the drop-down selection icon  within the Save as type field and select CSV (<i>Comma delimited</i>)(*.csv).
5	Verify or enter NewHireFilename.csv in the File name field, where “ <i>NewHireFilename</i> ” is the file saved using the naming convention covered previously. <i>It is not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



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

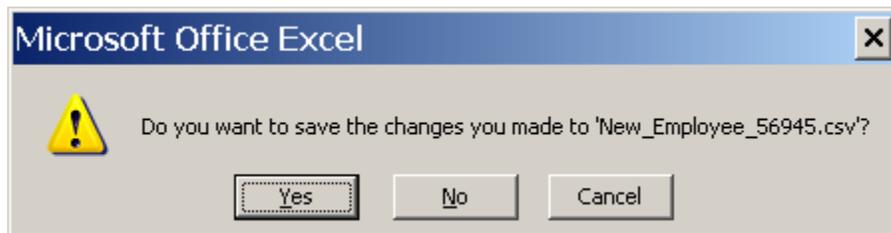
The following dialog box displays:



Do not become alarmed, this dialog box always displays.

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

The following dialog box displays:



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

D5. Importing the PCG_New_One_Employee.csv File into PCGenesis

D5.1. Performing a PCGenesis Data Backup



***** ATTENTION *****

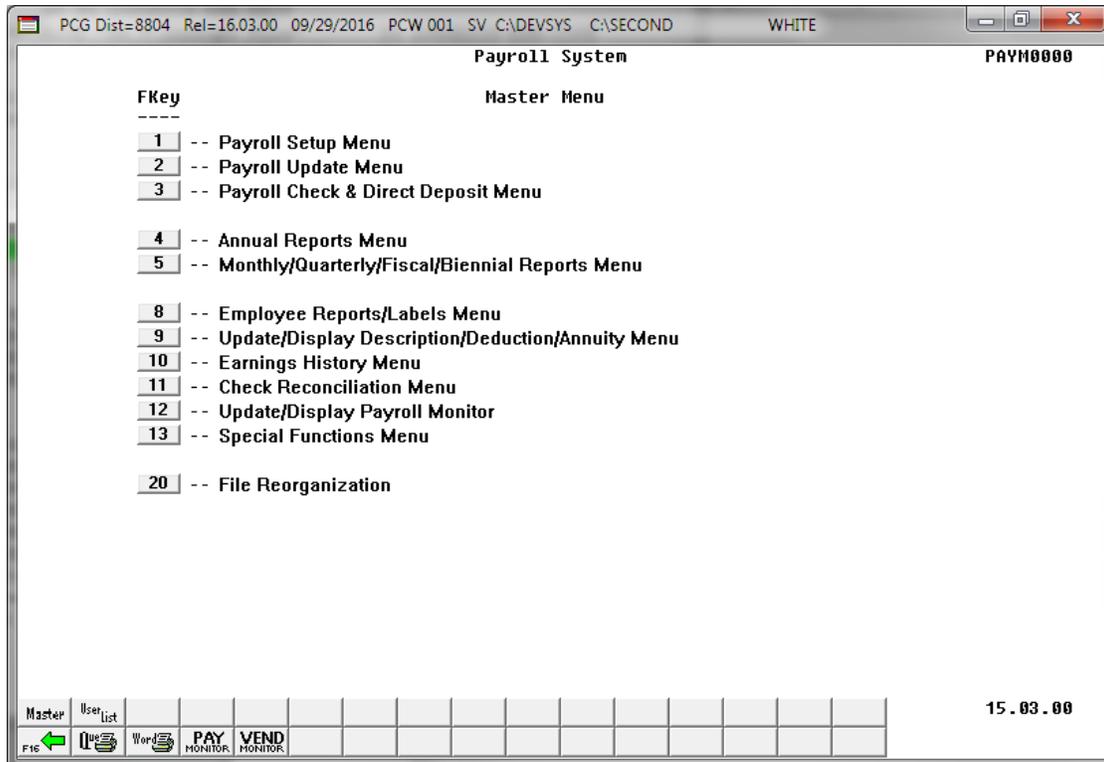
Performing a Data backup before the beginning of the import of new employee information into PCGenesis is strongly encouraged.

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

D5.2. Importing the Microsoft® Excel PCG_New_One_Employee.csv File into PCGenesis

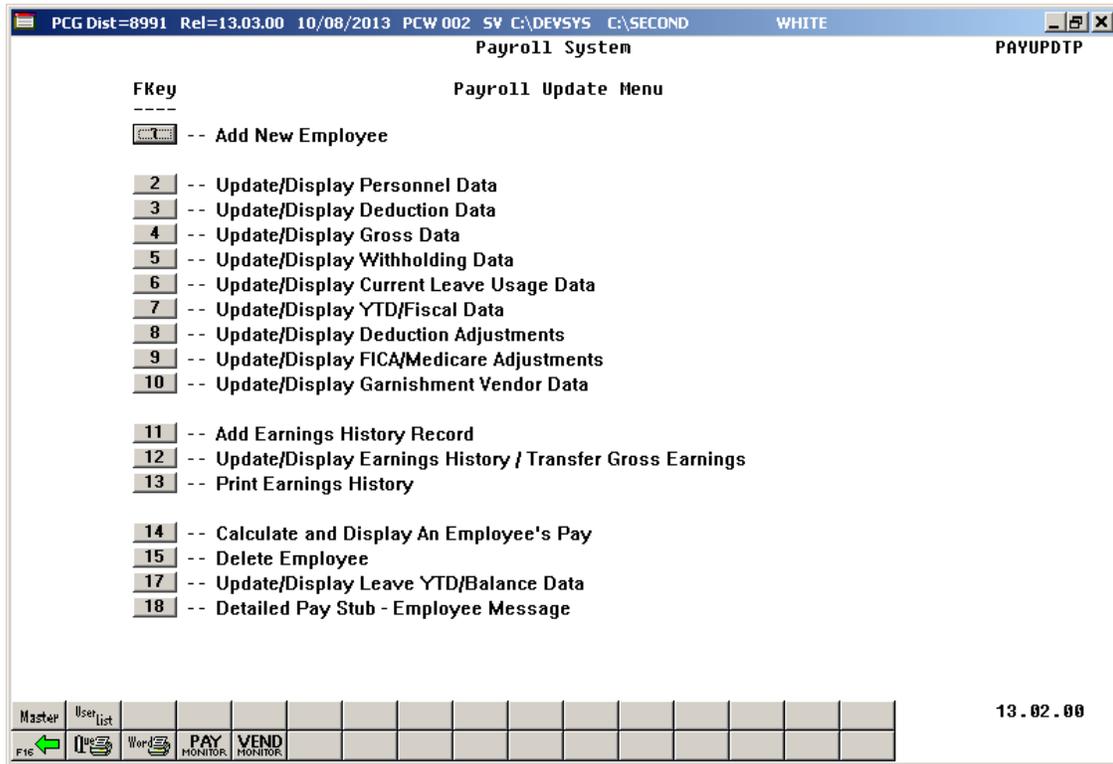
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 2 (F2 - Payroll System).

The following screen displays:



Step	Action
2	Select 2 (F2 - Payroll Update Menu).

The following screen displays:



Step	Action
3	Select 1 (F1 - Add New Employee).

The following screen displays:

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

Add New Employee **PAY01**

Status **A** -- Active

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

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

NAME First _____ Middle _____
 Last _____ Suffix _____ Prefix _____

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

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

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

Employee e-mail: _____

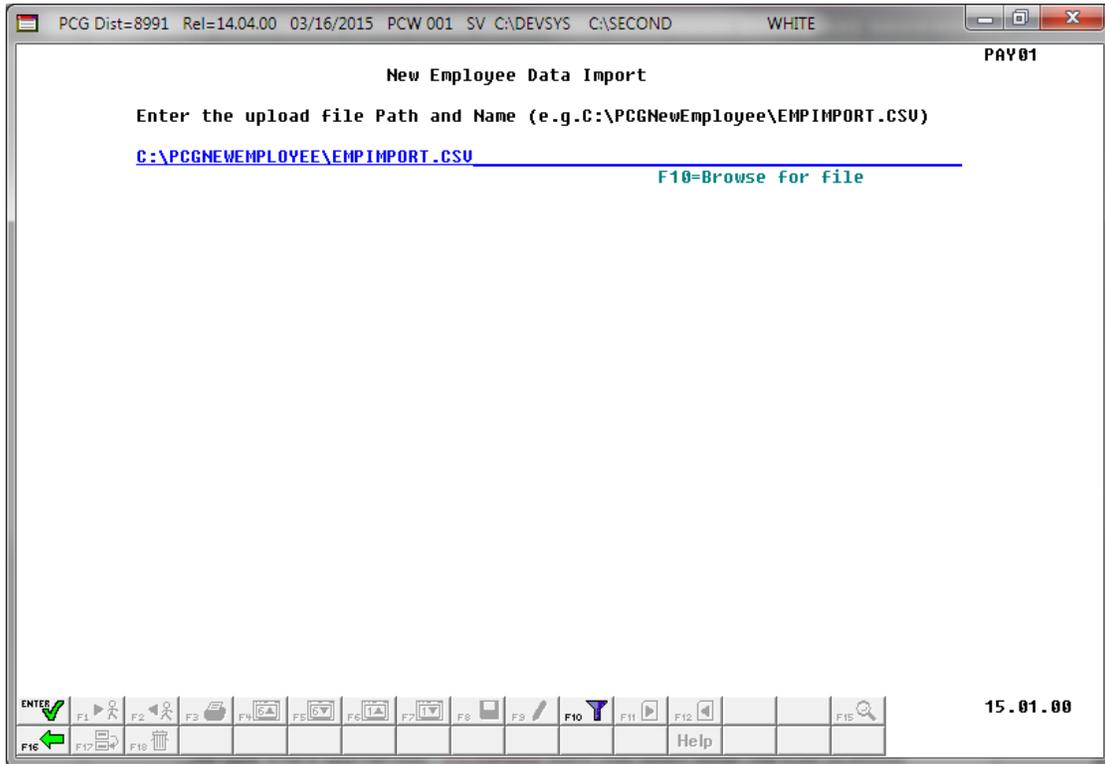
F17=Import new employee data

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

19.03.01

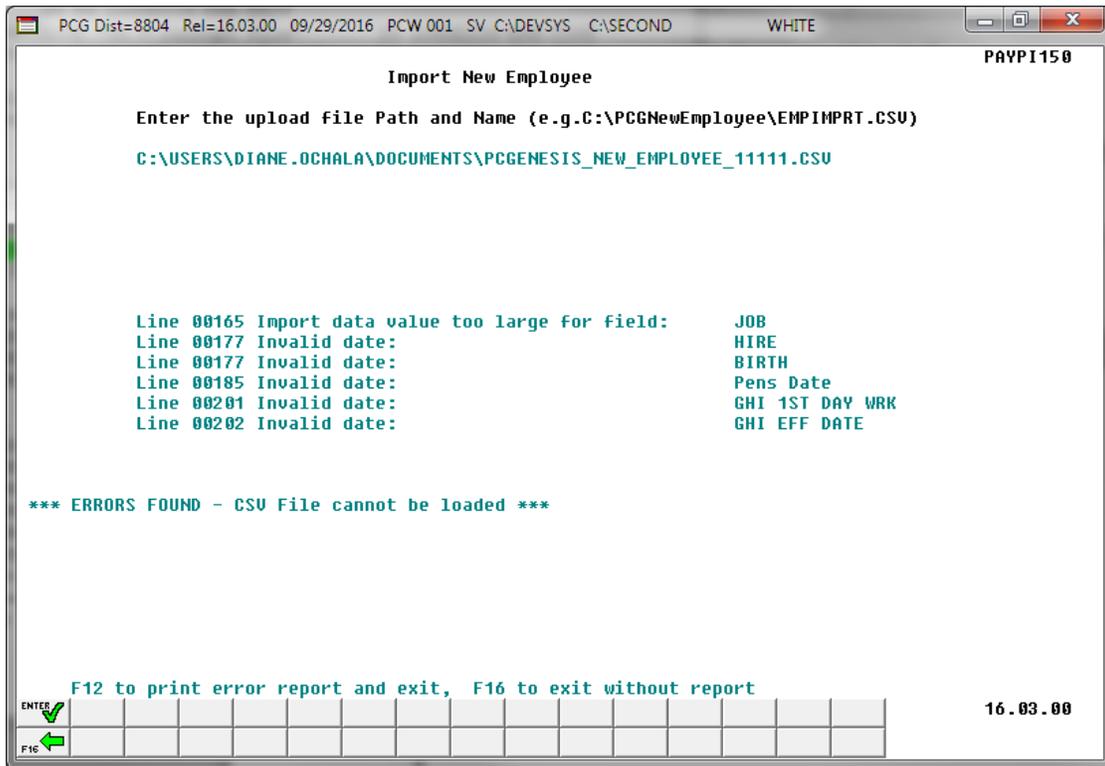
Step	Action
4	Select  F17 (Import new employee data).

The following screen displays:



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

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

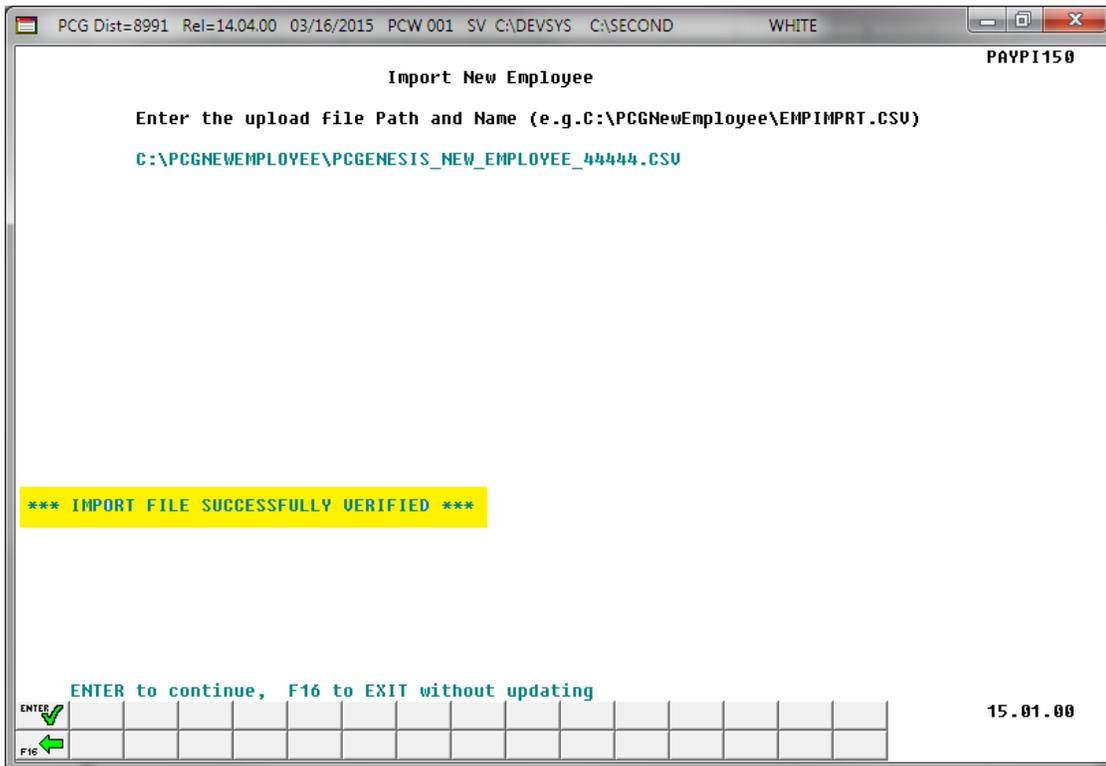


Step	Action
7	<p>For import file errors: Select F12 (to print error report and exit), or  (F16) to exit without a report. Within the Microsoft® Excel spreadsheet, correct the errors identified, and repeat this procedure beginning at <i>Step 3</i>.</p> <p><i>If the .csv file contains invalid data, the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

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

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

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



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

The following screen displays:

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

Add New Employee **PAY01**

Status A -- Active

Emp. no. 78781 Pay Loc 101 Location 000101 Class 1 CLASSROOM TEACHERS
 Sex Code E Work Loc 101 Job 77
 Mar Stat S SSN 777 56 7781 EEO-5 Job 000
 Ethnic 2

NAME First JANE Middle H.
 Last SMITH Suffix _____ Prefix MS.

Address 1 WEST FIRST STREET Certificate Type _____
 Address L2 APARTMENT 12 CS1 Job (from CPI) 000
 City/State ATLANTA, GA Include on CPI ? Y
 Zip Code 30000 County 999 Sick Bank ? N
 Phone (444)555-6666 Substitute rank 2
 Cell phone (404)333-2222 Hours Per Day _____

Birth Date 11/01/1961 GHI Eligible ? Y Participate in GHI ? Y
 Hire Date 1/01/2012 GHI BOE Trans? Y GHI Option B6
 Rehire Date _____ GHI 1st Day Wrk 1/01/2012 GHI Tier 10
 Term Date _____ GHI Coverage Start 2/01/2012 GHI Ded Cd 8
 Term Reason _____ GHI Change Code NEMP

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

19.03.01

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee PAY01

Status A -- Active HUDDLE MS, DEBBIE L.

Emp. no. 54545 Pay Loc 101 Location 000101 Class 1 CLASSROOM TEACHERS

Sex Code F Work Loc 101 Location 000101 Job 2 TEACHER 1-3

Mar Stat S SSN 545 45 4545 EEO-5 Job 000 Undefined

Ethnic 5 ASIAN

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

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

NAME First DEBBIE Middle L.
 Last HUDDLE Suffix MS Prefix _____

Address 1 WEST FIRST STREET Certificate Type _____
 Address L2 APARTMENT 2C CS1 Job (from CPI) 000
 City/State ATLANTA, GA Include on CPI ? Y
 Zip Code 30000 County 077 Sick Bank ? N
 Phone (111)222-3333 Irwin Substitute rank _____
 Cell phone () 000-0000 Hours Per Day _____

Birth Date 11/01/1980 GHI Eligible ? Y Participate in GHI ? Y
 Hire Date 1/01/2019 GHI BOE Trans? N GHI Option B3 ANTHEM BRONZE
 Rehire Date _____ GHI 1st Day Wrk 1/01/2019 GHI Tier 10 SINGLE
 Term Date _____ GHI Coverage Start _____ GHI Ded Cd 9
 Term Reason _____ GHI Change Code NEMP

Employee e-mail: DEBBIE.HUDDLE@DOE.K12.GA.US

Validations passed. Check screen 2 or save your changes.

19.03.01

ENTER F16 Help

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

The following screen displays:

PCG Dist=8991 Rel=19.04.00 12/18/2019 PCG 001 SV C:\DEVSY S C:\SECOND WHITE

Add New Employee **PAY01**

Status **A** -- Active

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

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

NAME First _____ Middle _____
 Last _____ Suffix _____ Prefix _____

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

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

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

Employee e-mail: _____

Employee: 054545 HUDDLE MS, DEBBIE L. was saved.

F17=Import new employee data

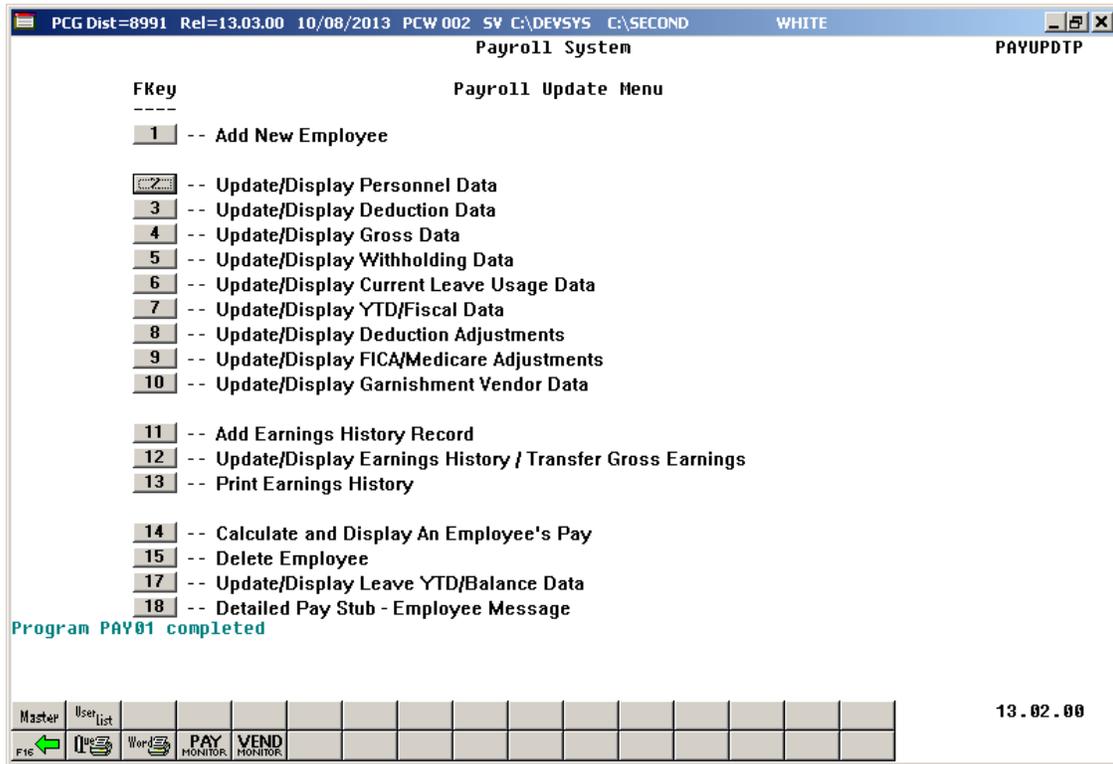
ENTER ✓ F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F15

F16 F17 F18 Help

19.03.01

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

The following screen displays:



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

Appendix A: Formatting the PCG_New_One_Employee.csv File (Multiple Files, One Employee Per File)

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

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

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

PCG_New_One_Employee.csv File Format Requirements	
9	The A3 Address line must meet the following specifications:
9.1	Must contain an A3 within <i>Column A</i> .
9.2	<i>Column E</i> must contain up to twenty-six (26) alphanumeric characters representing the employee's address city .
9.3	<i>Column H</i> must contain up to two (2) alphanumeric characters representing the employee's address state abbreviation code .
9.4	<i>Column I</i> must contain up to ten (10) alphanumeric characters representing the employee's address zip code .
9.5	<i>Column M</i> must contain up to ten (10) digits representing the employee's phone number .
10	The A4 Address line must meet the following specifications:
10.1	Must contain an A4 within <i>Column A</i> .
10.2	<i>Column E</i> must contain up to fifty (50) alphanumeric characters representing the employee's e-mail address . The e-mail address must contain one '@' sign.
10.3	<i>Column M</i> must contain up to ten (10) digits representing the employee's cell phone number .
11	The II Personnel line must meet the following specifications:
11.1	Must contain an II within <i>Column A</i> .
11.2	<i>Column D</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's hire date .
11.3	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's birth date .
11.4	<i>Column K</i> must contain up to one (1) alphanumeric character representing the employee's gender .
11.5	<i>Column N</i> must contain up to one (1) alphanumeric character representing the employee's marital status .
12	The I2 Personnel line must meet the following specifications:
12.1	Must contain an I2 within <i>Column A</i> .
12.2	<i>Column D</i> must contain up to two (2) digits representing the Ethnic code .
12.3	<i>Column F</i> must contain up to one (1) alphanumeric character representing the employee's Hispanic race code . Required for EEO-5 and CPI reporting.
12.4	<i>Column H, I, J, K, and L</i> must contain up to one (1) alphanumeric character representing the employee's American Indian, Black, White, Asian, and Hawaiian race codes respectively. Valid values are Y or N. Required for EEO-5 and CPI reporting.
12.5	<i>Column N</i> must contain up to one (1) alphanumeric character representing the employee's Include in CPI? code .

PCG_New_One_Employee.csv File Format Requirements	
13	The P1 Pension line must meet the following specifications:
13.1	Must contain an P1 within <i>Column A</i> .
13.2	<i>Column D</i> must contain up to one (1) alphanumeric character representing the pension switch .
13.3	<i>Column G</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's pension eligible date .
13.4	<i>Column K</i> must contain up to one (1) digit representing the pension code .
13.5	<i>Column N</i> must contain up to one (1) digit representing the TRS service indicator code .
14	The P2 Pension line must meet the following specifications:
14.1	Must contain an P2 within <i>Column A</i> .
14.2	<i>Column N</i> must contain up to two (2) digits representing the ' No pension ' code.
15	The T1 FICA Tax line must meet the following specifications:
15.1	Must contain an T1 within <i>Column A</i> .
15.2	<i>Column C</i> must contain up to one (1) alphanumeric character representing the FICA switch .
16	The T2 Federal Tax line must meet the following specifications:
16.1	Must contain an T2 within <i>Column A</i> .
16.2	<i>Column C</i> must contain up to one (1) alphanumeric character representing the Federal switch .
16.3	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's Federal marital filing status .
16.4	<i>Column E</i> must contain up to one (1) digit representing the Federal withholding code .
16.5	<i>Column F</i> must contain up to six (6) digits with two (2) decimal digits representing the Federal additional withholding amount/percent . The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as -123456.12
16.6	<i>Column K</i> must contain up to two (2) digits representing the number of Federal exemptions . <i>This field is valid for a W-4 filed prior to 2020.</i>
16.7	<i>Column N</i> must contain the appropriate response in the 2020 W-4? field. Valid Values: Y = Employee's W-4 form is from 2020 or later N = Employee's W-4 form is from prior to 2020

PCG_New_One_Employee.csv File Format Requirements	
17	The T3 State Tax line must meet the following specifications:
17.1	Must contain an T3 within <i>Column A</i> .
17.2	<i>Column C</i> must contain up to one (1) alphanumeric character representing the State switch .
17.3	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's State marital filing status .
17.4	<i>Column E</i> must contain up to one (1) digit representing the State withholding code .
17.5	<i>Column F</i> must contain up to six (6) digits with two (2) decimal digits representing the State additional withholding amount/percent . The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as -123456.12
17.6	<i>Column K</i> must contain up to two (2) digits representing the number of State marital allowances .
17.7	<i>Column N</i> must contain up to two (2) digits representing the number of State dependent allowances .
18	The T4 Federal 2020 W-4 line must meet the following specifications:
18.1	Must contain an T4 within <i>Column A</i> .
18.2	Federal 2020 W-4: Two jobs flag in <i>Column E</i> . If the 2020 W-4? field value is 'Y', enter 'Y' if the employee has checked the <i>Step 2</i> checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household. Valid Values: Y = <i>Step 2</i> checkbox is checked on the 2020 W-4 N = <i>Step 2</i> checkbox is <u>not</u> checked on the 2020 W-4 <i>This field is valid for a W-4 filed in year 2020 or later.</i>
18.3	Federal 2020 W-4: Depend amount (dependent amount) in <i>Column H</i> . If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 3</i> of the 2020 W-4 form as the amount claimed for dependents. <i>This field is valid for a W-4 filed in year 2020 or later.</i>
18.4	Federal 2020 W-4: Other income in <i>Column K</i> . If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 4a</i> of the 2020 W-4 form as the amount claimed for other income. <i>This field is valid for a W-4 filed in year 2020 or later.</i>
18.5	Federal 2020 W-4: Deduct amount (deduction amount) in <i>Column N</i> . If the 2020 W-4? field value is 'Y', enter the amount from <i>Step 4b</i> of the 2020 W-4 form as the amount claimed for deductions. <i>This field is valid for a W-4 filed in year 2020 or later.</i>

PCG_New_One_Employee.csv File Format Requirements	
19	The SI Salary line must meet the following specifications:
19.1	Must contain an SI within <i>Column A</i> .
19.2	<i>Column D</i> must contain up to six (8) digits with two (2) decimal digits representing the State salary . For example, the amount may be entered as 12345678.12
19.3	<i>Column H</i> must contain up to six (8) digits with two (2) decimal digits representing the cycle gross . For example, the amount may be entered as 12345678.12
19.4	<i>Column L</i> must contain up to one (1) digit representing the cycle code .
20	The S2 Salary line must meet the following specifications:
20.1	Must contain an S2 within <i>Column A</i> .
20.2	<i>Column D</i> must contain up to six (8) digits with two (2) decimal digits representing the contract amount . For example, the amount may be entered as 12345678.12
20.3	<i>Column H</i> must contain up to two (2) digits representing the number of contract months .
21	The H1 State Health line must meet the following specifications:
21.1	Must contain an H1 within <i>Column A</i> .
21.2	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's GHI eligible status .
21.3	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's GHI 1st Day Worked .
21.4	<i>Column L</i> must contain up to two (2) digits representing the GHI deduction code .
22	The H2 State Health line must meet the following specifications:
22.1	Must contain an H2 within <i>Column A</i> .
22.2	<i>Column D</i> must contain up to one (1) alphanumeric character representing the employee's GHI participation switch .
22.3	<i>Column H</i> must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's GHI coverage start date .
22.4	<i>Column L</i> must contain up to two (2) digits representing the GHI option code .
22.5	<i>Column N</i> must contain up to two (2) digits representing the GHI tier code .

PCG_New_One_Employee.csv File Format Requirements		
23	The H3 State Health line must meet the following specifications:	
	23.1	Must contain an H3 within <i>Column A</i> .
	23.2	<i>Column D</i> must contain up to three (3) digits with two (2) decimal digits representing the hours worked per week . The amount must be positive. For example, the amount may be entered as 123.12
	23.3	<i>Column L</i> must contain up to one (1) alphanumeric character representing the employee's GHI BOE Trans? value. The GHI BOE Transfer field indicates whether or not the employee transferred from another school district. Valid values for the field are Yes (Y), No (N) and "Don't know" (D).

Appendix B: PCGenesis Automatic Record Creation

B1. Payroll System Deduction Screen – Examples

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

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

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

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

Ded Desc Ded Annuity Company Credit Union 00000000000000 Section 125 Y
 EMP ANNUITY / 01 Ann Type Employee Contribution
 EMP ANNUITY / 02

17.01.00

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

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

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

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

Ded Desc Ded Annuity Company Credit Union 00000000000000 Section 125 Y
 EMP ANNUITY / 01 Ann Type Employee Contribution
 EMP ANNUITY / 02

17.01.00

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

B2.1. Certificate File - Biographical Screen – Example

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

DISPLAY/UPDATE INDIVIDUAL EMPLOYEE INFORMATION
CERTIFICATE FILE - BIOGRAPHICAL INFORMATION

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

Work location: 101 Location 000101
 Sex: F Birth: 11/01/1961
 Ethnic: 02

National cert: N (Y or N)
 Advance/Inhibit: (A, E or spaces)

Certificate level: Cert. pay step:
 Cert. years exp: Local years exp:

Total employment basis: 1.00
 Emp. basis-cert.: 1.00 Emp. basis-class: 0.00

Annual contract sal: \$ 30,000.00 Annual classified sal: \$.00
 State minimum salary: \$.00

Annual contract days: Annual work days:
 Termination date: Rehire date:
 Termination reason:

Long term sub?: N (Y or N)

19.03.00

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

B2.2. Certificate File Maintenance Screen – Example

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE CPICH100

**CERTIFICATE
FILE MAINTENANCE**

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

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

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

19.03.00

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

Help Bio Cert Asg

B2.3. Certificate File – Assignment Screen – Example

PCG Dist=8991 Rel=19.04.00 12/19/2019 PCG 002 SV C:\DEVSY S C:\SECOND WHITE CPICH100

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

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

Certificate Level: 0

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

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

.0

WARNING! - Percents on Assignments Do Not Equal 100%

19.03.00

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

Help Bio Cert Asg