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"Educating Georgia's Future"

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MEMORANDUM

TO: PCGenesis System Administrators

FROM: Steven Roache, Senior Information Systems Manager

SUBJECT: Release 15.02.00 – Fiscal Year 15 (FY15) Year-End Updates and Miscellaneous Changes / Installation Instructions

This document contains the PCGenesis software release overview and installation instructions for Release 15.02.00.

PCGenesis supporting documentation is provided at:

<http://www.gadoe.org/Technology-Services/PCGenesis/Pages/default.aspx>

June, 2015 Payroll Completion Instructions

Install this release after completing the June 2015 payroll(s). Install this release before executing F4 – Calculate Payroll and Update YTD for the July 2015 payroll.

Please import the 2016 CPI Salary Schedule into PCGenesis. The 2016 CPI Salary Schedule is available on the PCGenesis documentation web page.

The Fiscal Year End Checklist is available on the PCGenesis documentation web page. Please follow the instructions for completing the fiscal year end closing in the order provided.

For users of the new Enhanced Substitute Pay and Employee Leave System, to begin a new leave plan year, 1) Run the Plan Year Rollover Processing (F3, F4, F2, F11) first, and 2) Run the Advance Leave (F3, F4, F2, F10) second. The Create Original Leave of Absence File (F4, F9, F6) step can be run at any time since the leave data is pulled from the Leave History File.

For users of the Legacy Leave System, to begin a new leave plan year, 1) Create the Original Leave of Absence File (F4, F9, F6) first in order to capture FY 2015 leave totals for CPI reporting, and 2) Run the Automatic Leave Update (F3, F5, F3) second in order to clear the 2015 Fiscal Year leave totals.

A New PCGenesis User List Has Been Created

The Georgia Department of Education has created a new user list for PCGenesis. PCGenesis users can join the list by sending a blank e-mail to:

join-pcgenesis@list.doe.k12.ga.us

After joining the PCGenesis user list, users can take advantage of discussion forums by sending e-mails to:

pcgenesis@list.doe.k12.ga.us

An e-mail sent to pcgenesis@list.doe.k12.ga.us will broadcast the e-mail to all PCGenesis users enrolled in the group. Those PCGenesis districts and RESAs that join the user list will be able to share ideas, discuss problems, and have many more resources available for gaining insight into PCGenesis operations. Join today!

Mark Your Calendars!

PCGenesis Sessions and Training at GASBO 2015

The Georgia Department of Education is pleased to announce that PCGenesis will be offering two full days of sessions and training at this year's GASBO conference in November 2015. PCGenesis will have a dedicated room and will be offering the two regular GASBO sessions, three training sessions, and three roundtables for conference attendees. Contact GASBO for information about conference registration.

The tentative offerings are as follows:

- *Session 1 – PCGenesis Current Status & Future Plans*
- *Session 2 – PCGenesis Recent Enhancements & Changes, Emphasizing Affordable Care Act (ACA) Updates*
- *Session 3 – PCGenesis Roundtable – System Utilities and Future Needs*
- *Session 4 – PCGenesis Roundtable – Financial and Future Needs*
- *Session 5 – PCGenesis Payroll Training – To Be Determined*
- *Session 6 – PCGenesis Payroll Training – To Be Determined*
- *Session 7 – PCGenesis Payroll Training – To Be Determined*
- *Session 8 – PCGenesis Roundtable – Payroll and Future Needs*

*Gary Jenkins from Jasper County BOE has graciously volunteered to present the PCGenesis training sessions at GASBO. The three PCGenesis training sessions will address payroll training for payroll administrators and clerks. Gary will have the opportunity to offer 'real world' payroll scenarios and guidance for PCGenesis districts. To that end, we would like to hear from our districts as to what areas you would like to see covered in these payroll training sessions. **Please e-mail the PCGenesis Help Desk with suggestions for this training.** We want to make the training as valuable as we can for our users. We hope that the PCG payroll personnel will be able to attend this valuable conference. We look forward to seeing everyone!*

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Section A: Affordable Health Care Requirements

A1. Letter to Payroll Administrators

Dear Payroll Administrators,

Below is information which details the **Forms 1094-C and 1095-C** that are required for calendar year 2015. These forms will be produced at the same time as the 2015 W-2s, with a due date of January 31, 2016. The forms and instructions can be found at www.IRS.gov.

Form 1094-C: Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns

- Identifies employer as part of a control group (ALE Member)
- Answers the question of whether the employer met the *Penalty A* threshold
- Documents employer eligibility for certain transition relief

Form 1095-C: Employer-Provided Health Insurance Offer and Coverage

- Employee statement
- Answers the question of whether the employer met the *Penalty B* threshold
- Form 1095-C: Part II – Employee Offer and Coverage, Line 14: Offer of Coverage (enter required code)

Part II Employee Offer and Coverage													
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)													
15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
16 Applicable Section 4980H Safe Harbor (enter code, if applicable)													

- 1A: Qualifying Offer, for all 12 months, ER offered MV coverage that was affordable according to the federal poverty line safe harbor (\$93.18 per month), MEC offered to spouse and dependents
- 1B: MV offered to EE only. No coverage offered to spouse and dependents
- 1C: MV offered to EE. MEC offered to dependents. No coverage offered to spouse.
- 1D: MV offered to EE. MEC offered to spouse. No coverage offered to dependents
- 1E: MV offered to EE, MEC offered to spouse and dependents
- 1F: MEC not providing, MV offered
- 1G: Offer to EE who was not FT and enrolled in self-insured plan for one or more months
- 1H: No offer of coverage
- 1I: Qualifying Offer Transition Relief

(Coverage Code Options where **MV** is defined as minimum value and **MEC** is defined as minimum essential coverage:

- Form 1095-C: Part II – Employee Offer and Coverage, Line 15: Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage
 - Report the lowest contribution for self-only minimum value coverage, regardless of what tier of coverage enrolled
 - Only report on Line 15 if minimum value coverage is offered (State Health Benefit Plan offers a minimum value option)

- Form 1095-C: Part II – Employee Offer and Coverage, Line 16: Applicable Section 4980H Safe Harbor Code (enter code, if applicable)
 Coverage Code Options:
 - 2A: Employee not employed during the month.
 - 2B: Employee was employed, but not FT
 - 2C: Employee enrolled in coverage offered
 - 2D: Limited non-assessment period (measurement period, waiting period)
 - 2E: Multiemployer interim relief. Use this code for any employee where a fee is paid by the employer pursuant to a CBA
 - 2F: Form W-2 affordability safe harbor
 - 2G: Federal Poverty Line affordability safe harbor
 - 2H: Rate of Pay affordability safe harbor
 - 2I: Non-calendar year transition relief applies to employee for the month
 - If none apply, leave line 16 blank for that month

- Form 1095-C: Part III – Covered Individuals
 - Complete Part III ONLY if the employee enrolled in the employer-sponsored health coverage
 - Columns (a) through (e) must be completed for each individual enrolled in the coverage
 - Column (d) or (e) must indicate the months in which the individual was covered

Part III Covered Individuals															
If Employer provided self-insured coverage, check the box and enter the information for each covered individual. <input type="checkbox"/>															
(a) Name of covered individual(s)	(b) SSN	(c) DOB (if SSN is not available)	(d) Covered all 12 months	(e) Months of Coverage											
				Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
18			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

For **GHI-eligible employees** who are offered coverage through SHBP, LUAs will receive a file-feed from SHBP/ADP. This transmission file from SHBP/ADP will contain the necessary information to complete **Forms 1094-C and 1095-C** for those GHI-eligible employees. The transmission file will also contain those GHI-eligible employees’ dependent information.

NOTE: The file coming from SHBP/ADP will include employees who selected coverage from Kaiser Permanente. Because Kaiser Permanente is a fully insured plan, their employees and dependents are **not** reported by the school district, but are reported by Kaiser. Employees covered by Kaiser will receive their **1095-C forms** directly from Kaiser Permanente.

The Employer Shared Responsibility Provisions under the Affordable Care Act do include penalties related to failure to comply with the employer responsibilities. Detailed information is located at <http://www.irs.gov/Affordable-Care-Act/Employers/Questions-and-Answers-on-Employer-Shared-Responsibility-Provisions-Under-the-Affordable-Care-Act>.

PC Genesis and GaDOE Support

While the GaDOE and the PCGenesis development team are working to upgrade the PCGenesis system to assist with the required ACA reporting forms, it remains the LUA's responsibility to determine the appropriate reporting for the **Forms 1094-C and 1095-C**. We encourage you to begin the process of determining the codes by month for your variable rate employees and/or contracted individuals. **For PCGenesis users, any full-time employee who is **not** offered coverage through SHBP must be manually coded by the payroll administrator in the line items regarding health coverage.** It will be the sole responsibility of the LUA officials to determine which individuals are considered full time employees and the correct codes for those full time employees as related to health insurance offers and coverage.

The PCGenesis Help Desk personnel will not be able to assist or advise the school districts as to the correct codes and options for individual employees when preparing these forms. Therefore, we strongly recommend that LUA personnel consult with their HR professionals and/or attorneys.

Sincerely,

The PCGenesis Team
Georgia Department of Education

Section B: Overview of Release

B1. Payroll System

B1.1. New Teachers Retirement System (TRS) Rates for FY 2016

The TRS Board of Trustees has adopted the following changes to the employer and employee contribution rates effective July 1, 2015.

Fiscal Year 2016	
TRS	
Employer Rate:	14.27%
Employee Rate:	6.00%

This release automatically updates the TRS rates into PCGenesis.

B1.2. New Employees' Retirement System (ERS) Rates for FY 2016

The ERS Board of Trustees has adopted the following changes to the employer and employee contribution rates effective July 1, 2015.

Fiscal Year 2016	
Old ERS	
Employer contribution:	19.97%
Pickup:	05.00 %
Total Employer Rate:	24.97%
Employee Rate:	1.5%

Fiscal Year 2016	
New ERS	
Employer Rate:	24.72%
Employee Rate:	1.5%

This release automatically updates the ERS rates into PCGenesis.

B1.3. Pension Reporting Compliance File

A new report and output file have been added to the *PSERS Contribution Reports & Files* (F2, F5, F1) menu option. ERSGA requires a new *Pension Reporting Compliance File*. GASB 67 and 68 require that government pension plans and employers have adequate controls over significant census data. This is because pension plan census data such as enrollment, date of birth, salary, contributions, service earned, etc., are used to determine the plan's net pension liability and the employer's proportional share. Earlier in the year (January 2015), ERSGA wrote to non-statewide employers and vendors regarding improving the controls over census data between the employers and the pension plan. In support of this requirement, employers are required to submit a new *Pension Reporting Compliance File* to ERSGA. **The new file will contain the requested data for all eligible employees not enrolled in an ERSGA retirement plan.**

The PCGenesis-generated *Pension Reporting Compliance File* will have a file format conforming to that specified by ERSGA, and must be filed electronically. Employer *Pension Reporting Compliance Files* being submitted electronically must be named as follows: 'yyyymmAAAAAAAC.ERSGA', where **yyyymm** represents the reporting period and year, **AAAAAAA** is an alphanumeric employer or district code, and **C** is a constant designator used to distinguish this file from other data files submitted by the provider.

The new PSERS transmission file will be created at the same time as the PSERS contribution file is created from the *PSERS Contribution Reports & Files* (F2, F5, F1) menu option. The PSERS files are NOT submitted during the months of June, July, and August.

For the new *Pension Reporting Compliance File* to be created correctly, users will need to update the **ERS Job Class** code for each *Job Description* record ('J' record) on the *Payroll Description File*. See *Section B1.5. Description File – Job Description Records* in this document for more information.

Users will also need to code all employees who are not enrolled in a public pension (**Pension Code = 0**) with a new field on the *Update/Display Gross Data* screen. The new field is the **No Pension Code** and is described in *Section B1.4. Add No Pension Code to Update/Display Gross Data* of this document.

B1.4. Add No Pension Code to Update/Display Gross Data

A new field has been added to the *Update/Display Gross Data* screen (F2, F2, F4). The **No Pension Code** field has been added to support the new *Pension Reporting Compliance File* required by ERSGA. A valid value must be entered in the **No Pension Code** field when the employee's **Pension Code** is set to '0', no pension. If the employee is enrolled in a public pension (**Pension Code** values of '1' thru '5'), then the **No Pension Code** value must be '00'.

The screenshot shows the 'Update/Display Gross Data' screen for employee 87742. The 'Pension Code' is set to 0, and the 'No Pension Code' is set to 13. A dialog box titled 'Reason for No Pension...' is open, showing a list of reasons for no pension, with '13 Non Employees' selected.

Update/Display Gross Data

Status: Active
 EmpNo: 87742 AB3EU, M03TY
 SSN: 999-08-7742
 Loc: 2050 Location: 002050
 Class: 18 CUSTODIAN PARTTIME
 Job cd: 42 OTHER
 Salary sched: _____ Cert level: PBT Pay step: E State yrs: 0 Local yrs: 0
 Work sched ID: _____ Hrs/Day: 0.000 Days/Week: 0 Hrs/Week: 40.00 13/14 pay sw: _____ Budget pay cat: _____
 Ann work days: 0 Days worked YTD: 0.00 This per: 0.00 Days docked YTD: 0.00 This per: 0.00

Proc Type	Pay Type	Pay Rate	Days/Hrs	Days/Hrs	Regular Gross	Overtime Gross	GHI %	Pay Dist	Pay Reas	Pay for Period	End
01.											
02.											
03.											
04.											
05.											
06.											

Yr	Fnd	F	Prgm	Funct	Objct	Fcty	B	Add't'l	Pens Gross	Pens Amt	Contract	Sub Distrib	Budget Flag
ACCT 01	00												
ACCT 02	00												
ACCT 03	00												
ACCT 04	00												
ACCT 05	00												
ACCT 06	00												

Total gross _____ Pens code: 0 NO PENS
 Cycle gross _____ Pens switch: N TRS/ERS Pens Gross _____
 State salary _____ TRS service ind: 0 Adj Amt/% _____
 Local salary _____ No pension code: 13
 Other _____ Pens Amt/% _____
 Contract amt _____ Pens elig date: _____

Reason for No Pension...

- 12 Reired Retiree Part-Time
- 13 Non Employees
- 14 Other Pension Plan
- 15 Discontinue ERS After Age 65
- 16 Other

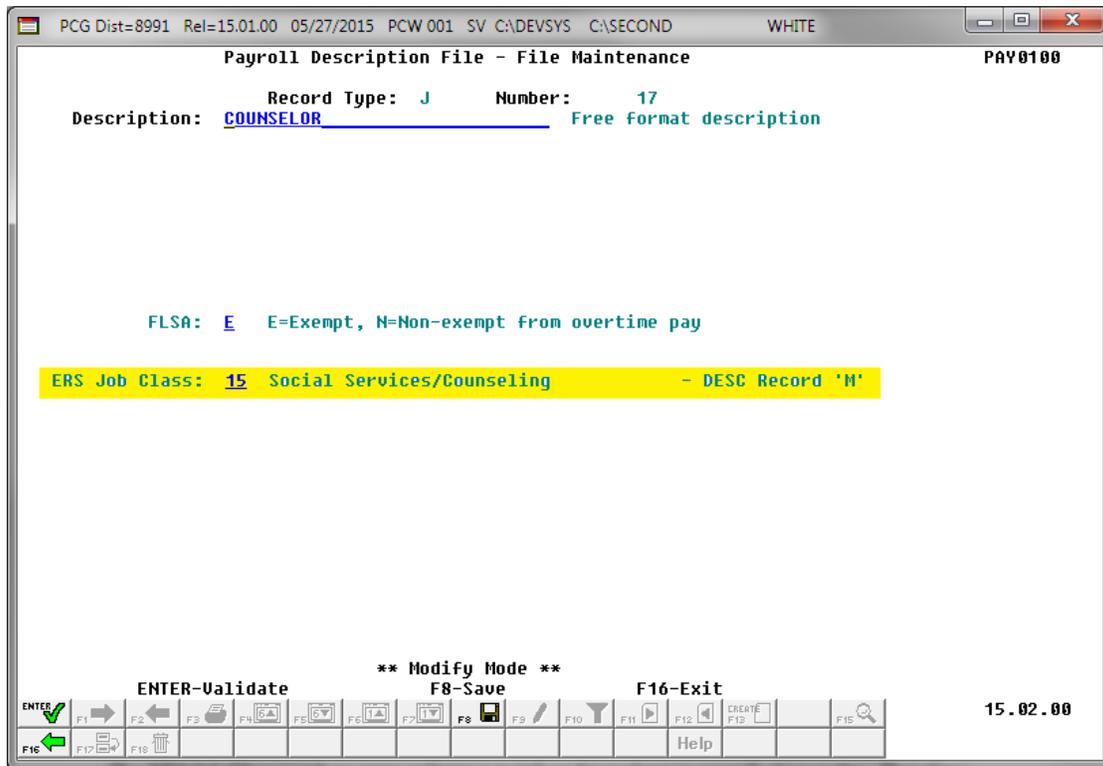
Buttons: Done, Cancel

B1.5. Description File – Job Description Records

A new field has been added to the *Job Description* records ('J' records) on the *Payroll Description File* (F2, F9, F1). For the new *Pension Reporting Compliance File* to be created correctly, users will need to update the **ERS Job Class** code for each *Job Description* record ('J' record) on the *Payroll Description File*. A drop down lookup box is available for the **ERS Job Class** field to facilitate entering a valid value.

Before this release, the **ERS Job Class** field was defined on the *Pay Class* record ('C' record). This was not the correct location for the **ERS Job Class** field and with the installation of *Release 15.02.00*, the field has been moved to the *Job Description* record ('J' record) on the *Payroll Description File*. The **ERS Job Class** field is no longer available on the *Pay Class* record.

Also, the **TRS ZERO EE** field has been removed from the *TRS Pay Reason* records ('X' records) on the *Payroll Description File* because the field is now obsolete.



Maintain Description Records – Job Description Records ('J' records) Screen

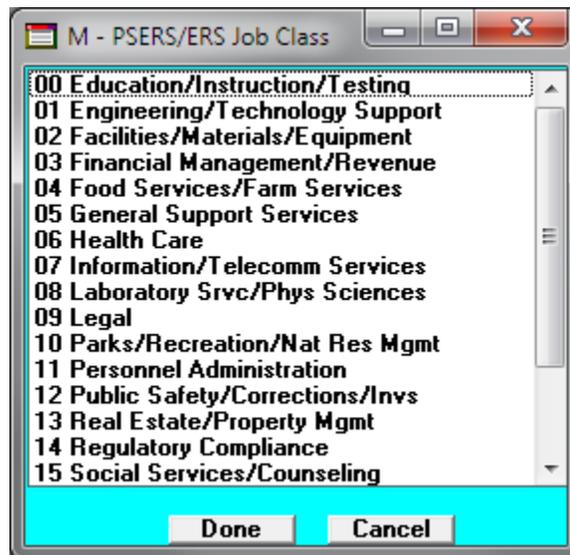
B1.6. Description File – PSERS/ERS Job Class Records

Several new codes have been added to the *PSERS/ERS Job Class* records ('M' records) on the *Payroll Description File* (F2, F9, F1). The new codes are needed for the new *Pension Reporting Compliance File*. The following codes have been added to the existing codes on the 'M' table:

- 18 – Conversion
- 19 – Part-time legal
- 20 – Agency head

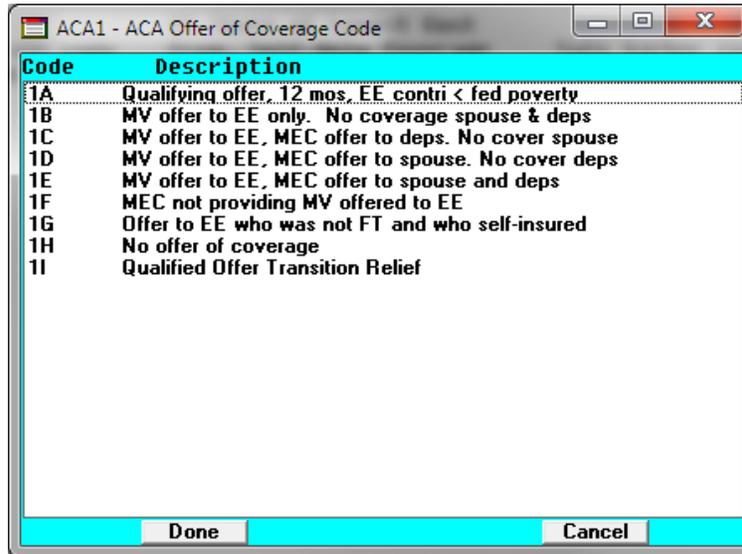
This release automatically updates the *PSERS/ERS Job Class* records ('M' records) codes into PCGenesis.

The codes on the *PSERS/ERS Job Class* records ('M' records) on the *Payroll Description File* define the valid ERS job codes. These codes are accessed when defining the **ERS Job Class** field for each *Job Description* record ('J' record) on the *Payroll Description File*. The *PSERS/ERS Job Class* records ('M' records) are displayed when the drop down lookup box is accessed for the **ERS Job Class** field on the *Job Description* record ('J' record) on the *Payroll Description File* as shown below. Refer to *Section B1.5. Description File – Job Description Records* in this document for more information on the *Job Description* records ('J' records) and the **ERS Job Class** field.



B1.7. Add Affordable Care Act (ACA) Tables to Alpha Description File

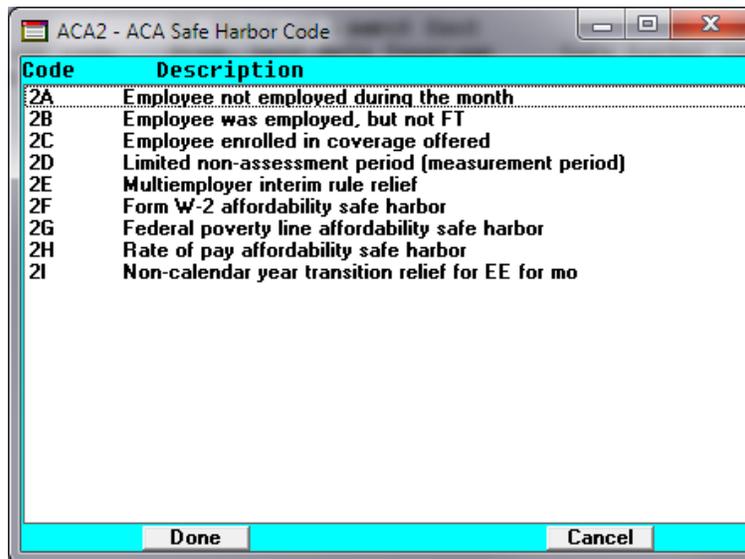
The *Alpha Description File* (F2, F9, F2) has been updated with two new tables needed for the Affordable Care Act (ACA). A new **ACA1** table which contains the *ACA Offer of Coverage* codes has been added. The valid values for the **ACA1** table are shown below:



Code	Description
1A	Qualifying offer, 12 mos. EE contri < fed poverty
1B	MV offer to EE only. No coverage spouse & deps
1C	MV offer to EE, MEC offer to deps. No cover spouse
1D	MV offer to EE, MEC offer to spouse. No cover deps
1E	MV offer to EE, MEC offer to spouse and deps
1F	MEC not providing MV offered to EE
1G	Offer to EE who was not FT and who self-insured
1H	No offer of coverage
1I	Qualified Offer Transition Relief

ACA Offer of Coverage Codes (ACA1) Drop-Down Lookup Box

A new **ACA2** table which contains the *ACA Safe Harbor* codes has been added. The valid values for the **ACA2** table are shown below:



Code	Description
2A	Employee not employed during the month
2B	Employee was employed, but not FT
2C	Employee enrolled in coverage offered
2D	Limited non-assessment period (measurement period)
2E	Multiemployer interim rule relief
2F	Form W-2 affordability safe harbor
2G	Federal poverty line affordability safe harbor
2H	Rate of pay affordability safe harbor
2I	Non-calendar year transition relief for EE for mo

ACA Safe Harbor Codes (ACA2) Drop-Down Lookup Box

This release automatically updates the **ACA1** and **ACA2** codes into PCGenesis.

B1.8. Add New Employee

Several changes have been made to the *Add New Employee* screen (F2, F1). The **No Pension Code** field has been added to the *Add New Employee* screen. Also, the **TRS & ERS Pens Gross Adj Amt/%** field has been returned to the *Add New Employee* screen.

Before, a separate field was used for the EEO-5 reporting and the field was designated **EEO-5 Ethnic** on the *Add New Employee* screen. However, the EEO-5 report was recently updated to use the *Hispanic* and *Race* fields which are also used for CPI reporting; these fields are now named **EEO-5 and CPI Ethnic/Race** on the screen. Therefore, the EEO-5 Ethnic field has been renamed to **Ethnic**, and is now available for informational purposes only.

The salary information on screen 2 of the *Add New Employee* module has been rearranged to make reading the screen more user-friendly.

B1.9. Add ‘Eligible for Rehire’ Flag to Update/Display Personnel Data

A new field has been added to the *Update/Display Personnel Data* screen (F2, F2). The field **Eligible for Rehire** has been added to the screen. This field is a *Yes/No* flag which identifies whether or not the employee is eligible to be rehired. The **Eligible for Rehire** field will be initialized to ‘Y’ (Yes) when an employee is added to the system. If the district determines at any point in time that the employee is no longer eligible to be rehired, the **Eligible for Rehire** field can be manually changed to ‘N’ (No).

Also, a change has been made to the ethnicity code labels on the *Update/Display Personnel Data* screen. Before, a separate field was used for the EEO-5 reporting and the field was designated **EEO-5 Ethnic** on the *Personnel Data* screen. However, the EEO-5 report was recently updated to use the *Hispanic* and *Race* fields which are also used for CPI reporting; these fields are now named **EEO-5 and CPI Ethnic/Race** on the screen. Therefore, the EEO-5 Ethnic field has been renamed to **Ethnic**, and is now available for informational purposes only.

B1.10. Export/Import Selected Payroll / Deduction / CPI Information

Support has been added to the *Export Selected Payroll/Deduction/CPI Information* (F2, F13, F8, F5) and the *Import Selected Payroll Information* (F2, F13, F8, F6) features for the export/import of additional payroll fields. The user is now allowed to select the ‘**No Pension**’ Code field for export from the *Payroll File*.

Selecting the **Export File Type** of ‘I’ (Create File to Modify and Import) during the export process allows the user to create an export file which, after user modifications to the data have been made, can then be imported back into the *Payroll File* data. The user is now allowed to select the ‘**No Pension**’ Code field for import into the *Payroll File*. This process will facilitate loading this data to employee records for ERSGA reporting.

B1.11. Return ERS/TRS Pension Gross Adjustment field to Gross Data screen

Several changes have been made to the *Gross Data* screen (F2, F2, F4). The **TRS & ERS Pens Gross Adj Amt/%** field was removed in a prior release of PCGenesis, and is now being returned to the *Gross Data* screen. 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 ERS/TRS reported wages by the 4%.

According to the *TRS Employer’s Reference Guide* (pages 76-77), a tax sheltered annuity plan is listed as other earnable compensation.

Also, the salary information at the bottom of the *Gross Data* screen has been rearranged to make reading the screen more user-friendly.

B1.12. GHI Change File for State Health Benefits

New transaction codes have been added to the *GHI Change File for State Health Benefits* (F2, F5, F4) process. Two new transaction codes, **HACA** and **TACA**, are now available for use. These transaction codes are to be used for a subset of employees who would go on and off ACA coverage based upon the IRS requirements for full time employees. Therefore, **HACA** and **TACA** will not be used for brand new employees or terminating employees, but for employees who work in the district and may go on and off ACA based upon their IRS eligibility.

HACA	Employment Record Start - New Employee Due to ACA Eligibility	New ACA Coverage	AUF
TACA	Employment Record Stop - Terminated Employment Due to ACA Ineligibility	Termination of ACA Coverage	AUF

Each district is responsible for determining ACA eligibility for an individual.

- When an employee is deemed eligible for ACA, the agency will send an **HACA** record type indicating that this person is eligible for benefits in the ADP system. The GHI Change record will contain the date that the individual became ACA eligible.
- When the employee is no longer eligible for ACA, the agency will send a **TACA** Record Type to ADP with the **Date of Last Deduction** field completed.

B1.13. Add GHI Option Field to Earnings History Records

The **GHI Option** has been added to earnings history and is populated from the employee *Update/Display Personnel* field during payroll. Having the **GHI Option** in earnings history will facilitate creating the new *Print Affordable Healthcare Act Worksheet* (F3, F6, F1). (Refer to *Section B2.5. Print Affordable Healthcare Act Worksheet* in this document for additional information.) With the **GHI Option** available on the *Earnings History* record, the system will be able to determine if an SHBP deduction was not taken for the employee because the employee waived coverage.

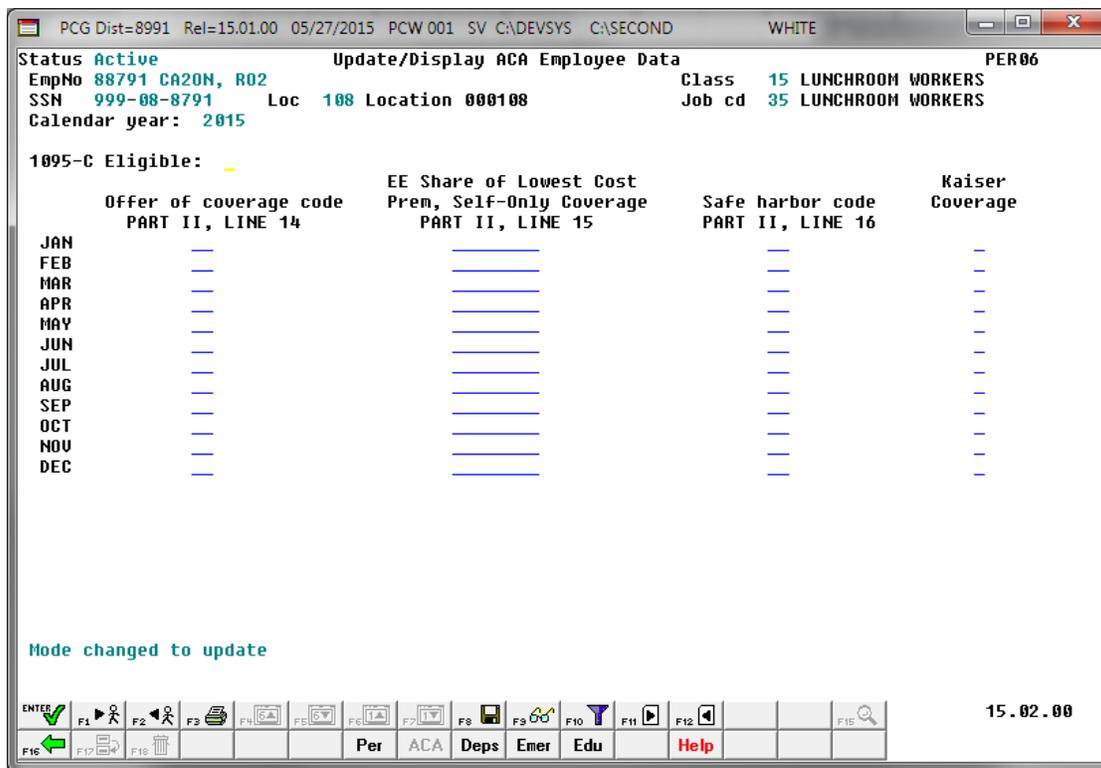
B2. Personnel System

B2.1. Update/Display Affordable Care Act (ACA) Employee Data

The GaDOE is pleased to announce the first phase of changes required for Affordable Healthcare Act (ACA) compliance, with an eye towards producing IRS forms 1094-C and 1095-C. To this end, two new employee maintenance screens have been added to PCGenesis on the *Personnel Update Menu: Update/Display ACA Employee Data* (F3, F1, F3) and *Update/Display ACA Dependent Data* (F3, F1, F4).

The *Update/Display ACA Employee Data* (F3, F1, F3) screen has been created to allow entry of the employee data required for IRS form 1095-C and is shown below. The data on the *Update/Display ACA Employee Data* screen will be populated in one of two ways. First, for **GHI-eligible employees** who are offered coverage through SHBP, districts will receive a file-feed from SHBP/ADP. This transmission file from SHBP/ADP will contain the necessary information to populate the *Update/Display ACA Employee Data* screen for those GHI-eligible employees, and to complete the form **1095-C** for those employees. The transmission file will also contain those GHI-eligible employees' dependent information.

Second, any full-time employee who is **not** offered coverage through SHBP must be manually coded by the payroll administrator in the line items regarding health coverage. The data must be entered manually on the *Update/Display ACA Employee Data* screen. It will be the sole responsibility of the LUA officials to determine which individuals are considered full time employees and the correct codes for those full time employees as related to health insurance offers and coverage. The **1095-C Eligible** field on the *Update/Display ACA Employee Data* screen indicates to the system whether the employee is considered full-time based upon IRS ACA regulations. A 'Y' (Yes) value in the **1095-C Eligible** field indicates that the system will print a 1095-C for the employee.



PCGenesis Update/Display ACA Employee Data Screen

B2.2. Update/Display Affordable Care Act (ACA) Dependent Data

The GaDOE is pleased to announce the first phase of changes required for Affordable Healthcare Act (ACA) compliance, with an eye towards producing IRS forms 1094-C and 1095-C. To this end, two new employee maintenance screens have been added to PCGenesis on the *Personnel Update Menu*: *Update/Display ACA Employee Data* (F3, F1, F3) and *Update/Display ACA Dependent Data* (F3, F1, F4).

The *Update/Display ACA Dependent Data* (F3, F1, F4) screen has been created to allow entry of the employee data required for IRS form 1095-C and is shown below. The data on the *Update/Display ACA Dependent Data* screen will be populated from the SHBP/ADP file-feed. For **GHI-eligible employees** who are offered coverage through SHBP, districts will receive a file-feed from SHBP/ADP. This transmission file from SHBP/ADP will contain the necessary information to populate the *Update/Display ACA Dependent Data* screen for those GHI-eligible employees, and to complete the form **1095-C** for those employees. The transmission file contains those GHI-eligible employees' dependent information.

Any full-time employee who is **not offered coverage through SHBP does not report dependent information on the 1095-C form.** It is not necessary to enter any dependent information for employees who are not offered health insurance coverage by the LUA.

PCG Dist=8991 Rel=15.01.00 05/27/2015 PCW 001 SV CADEVSYS CASECOND WHITE

Status **Active** Update/Display ACA Dependent Data PER07
 EmpNo **88005 CA4SEY, BU4L** Class **16** SUBSTITUTE LUNCHROOM
 SSN **999-08-8005** Loc **6793** Location **006793** Job cd **36** LUNCHROOM SUBSTITUTE
 Calendar year: **2015**

SSN	BIRTH DATE	SEX	SPOUSE	NAME	RELATIONSHIP	MONTHS OF COVERAGE														
						JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC			
01	00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																
02	000 00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																
03	000 00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																
04	000 00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																
05	000 00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																
06	000 00 0000	-	-	(L)		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
				(F)																
				(M)																
				(R)																

Mode changed to update

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

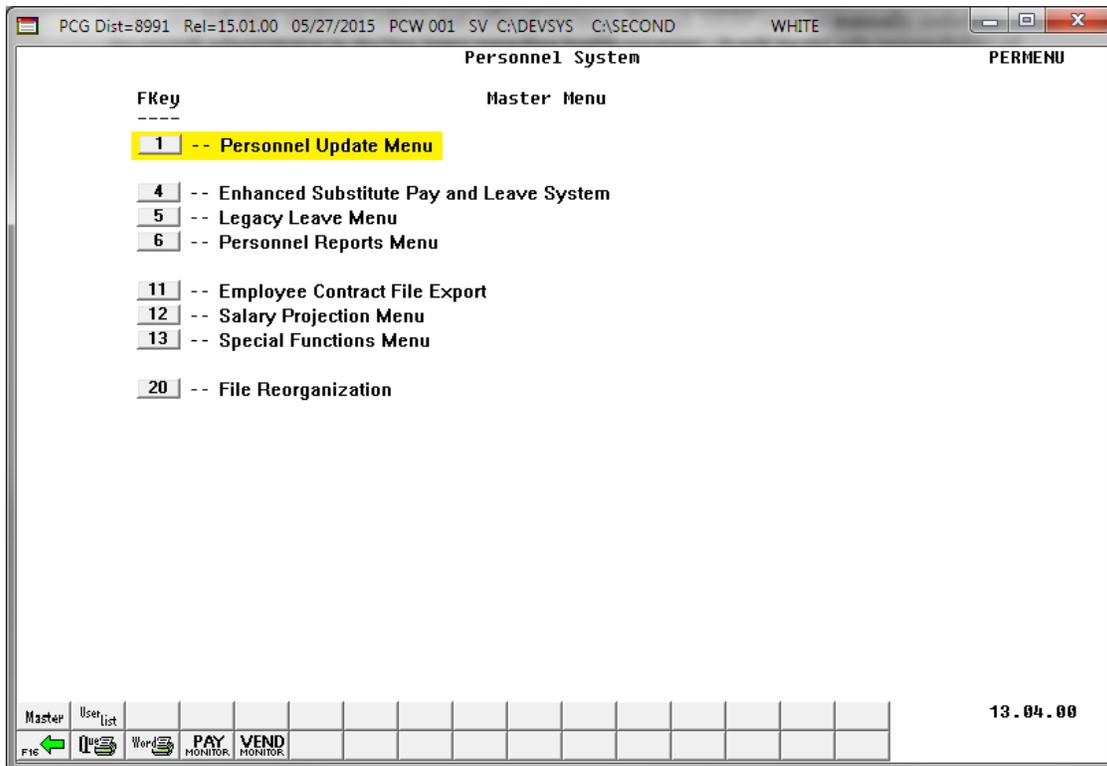
Per ACA Deps Emer Edu Help

15.02.00

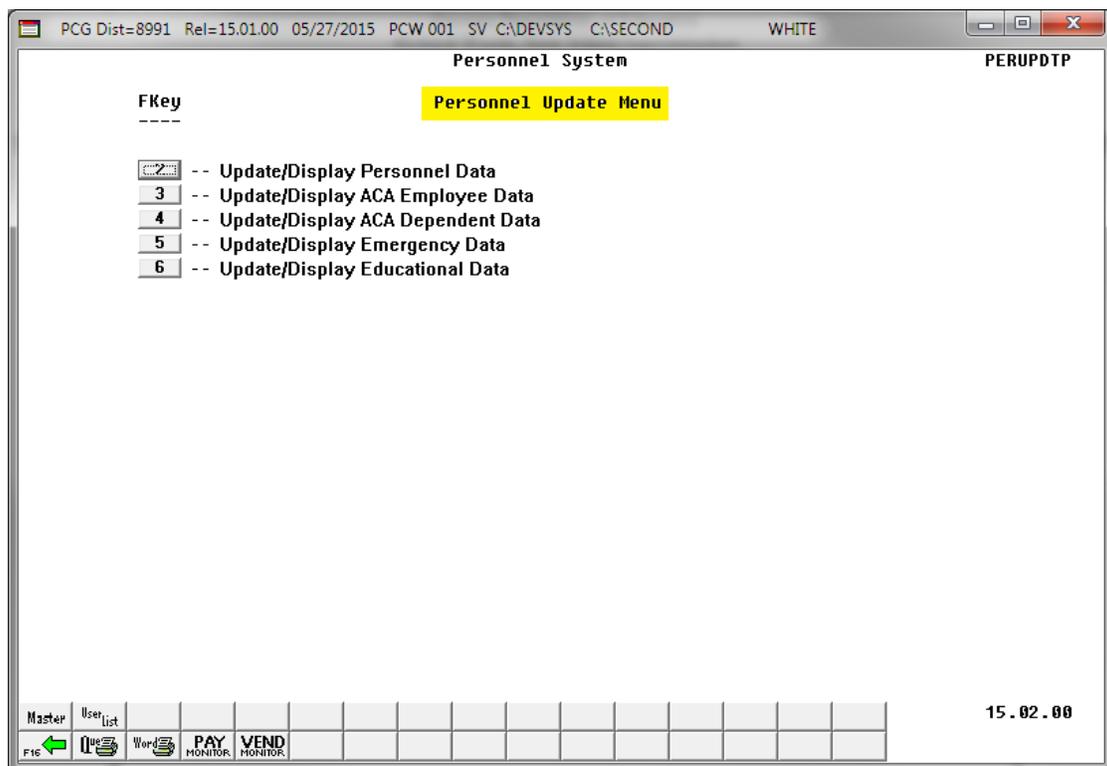
PCGenesis Update/Display ACA Dependent Data Screen

B2.3. Personnel Update Menu

The personnel employee data screens have been moved to a *Personnel Update Menu* located on the *Personnel Master Menu* (F3, F1). The *Personnel Update Menu* allows access to the *Update/Display Personnel Data* screen, the *Update/Display ACA Employee Data* screen, the *Update/Display ACA Dependent Data* screen, the *Update/Display Emergency Data* screen and the *Update/Display Educational Data* screen. Each of these screens can now be accessed via the *Pay Find* module, and once an employee has been selected with *Pay Find*, all screens are available by toggling the function keys (F-keys) at the bottom of the screen.



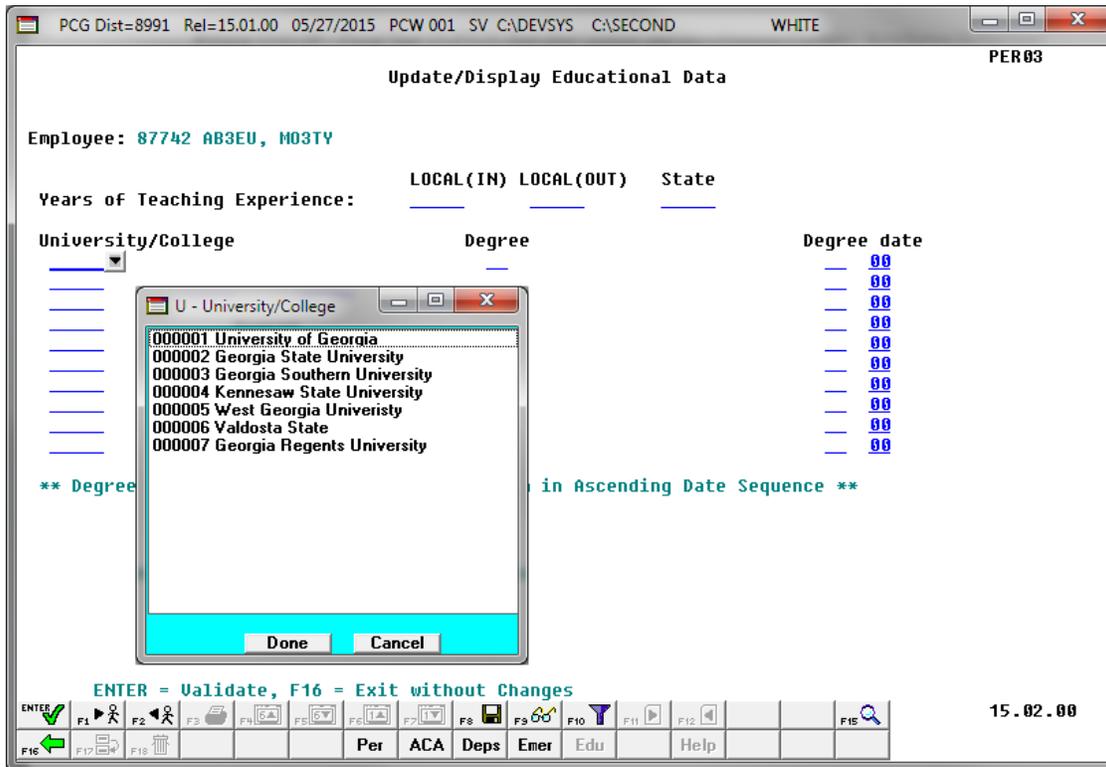
PCGenesis Personnel Master Menu



PCGenesis Personnel Update Menu

B2.4. Update Display Educational Data

The *Update/Display Educational Data* screen (F3, F1, F6) has been updated. Now drop-down lookup functionality has been added to the **University/College** fields and the **Degree** fields as shown below.



PCGenesis Update/Display Educational Data Screen

B2.5. Print Affordable Healthcare Act Worksheet

The *Print Affordable Healthcare Act Worksheet* (F3, F6, F1) has been added to the *Personnel System Reports Menu*. The worksheet is a tool that districts can use to identify employees who may need to be manually coded for the Affordable Care Act IRS 1095-C form. The PCGenesis system will analyze all payments made to all employees during the course of a calendar year to determine whether or not an SHBP deduction was present on the payments. If an SHBP deduction was not taken, the employee will appear on the worksheet with spaces available for coding the **1095-C Eligibility** field, the **Offer of Coverage Code**, the **Lowest Premium** amount, and the **Safe Harbor Code**. The Payroll Administrator can use this worksheet for entering the data into the *Update/Display ACA Employee Data* screen (F3, F1, F3). An example of the worksheet is shown below.

REPORT DATE: 06/10/2015		AFFORDABLE HEALTHCARE WORKSHEET							PAGE: 2		
REPORT TIME: 10:51		SORTED BY Class, Employee Name							PROGRAM: ACAFRT		
		CALENDAR YEAR - 2014									
EMFNO	SOCIAL SEC	NAME	CLASS	JOB	HIRE DT	REHIRE DT	TERM DT	ELIBIBLE FOR 1095-C?			
89754	999-08-9754	BUTKHART, MA7INE	01	003	2/01/2008	8/01/2014	2/01/2014	OFFER	LOWEST	SAFE	
	TOT HRS	TOT GR	TOT NET	CHNO	CHNO	CHNO	CHNO	CODE	PREM	CODE	
	JAN		1,232.00	920.61	235045			---	---	---	
	FEB		2,327.00	1,701.46	235421			---	---	---	
	MAR		400.00	366.57	47741			---	---	---	
	APR	EMPLOYEE NOT PAID						---	---	---	
	MAY	EMPLOYEE NOT PAID						---	---	---	
	JUN		150.00	138.52	236866			---	---	---	
	JUL	EMPLOYEE NOT PAID						---	---	---	
	AUG		3,097.78	2,270.58	237783			---	---	---	
	SEP		3,355.94	2,435.23	238149			---	---	---	
	OCT		3,505.93	2,542.24	238529			---	---	---	
	NOV		3,355.93	2,435.22	238909			---	---	---	
	DEC		3,355.93	2,435.22	239288			---	---	---	

EMFNO	SOCIAL SEC	NAME	CLASS	JOB	HIRE DT	REHIRE DT	TERM DT	ELIBIBLE FOR 1095-C?		
89026	999-08-9026	BUTLESON, RO7LAND	01	003	8/01/2014			OFFER	LOWEST	SAFE
	TOT HRS	TOT GR	TOT NET	CHNO	CHNO	CHNO	CHNO	CODE	PREM	CODE
	JAN	EMPLOYEE NOT PAID						---	---	---
	FEB	EMPLOYEE NOT PAID						---	---	---
	MAR	EMPLOYEE NOT PAID						---	---	---
	APR	EMPLOYEE NOT PAID						---	---	---
	MAY	EMPLOYEE NOT PAID						---	---	---
	JUN	EMPLOYEE NOT PAID						---	---	---
	JUL	EMPLOYEE NOT PAID						---	---	---
	AUG		2,758.67	1,944.36	237995			---	---	---
	SEP	SHEP DEDUCTION TAKEN						---	---	---
	OCT	SHEP DEDUCTION TAKEN						---	---	---
	NOV	SHEP DEDUCTION TAKEN						---	---	---
	DEC	SHEP DEDUCTION TAKEN						---	---	---

Affordable Healthcare Worksheet

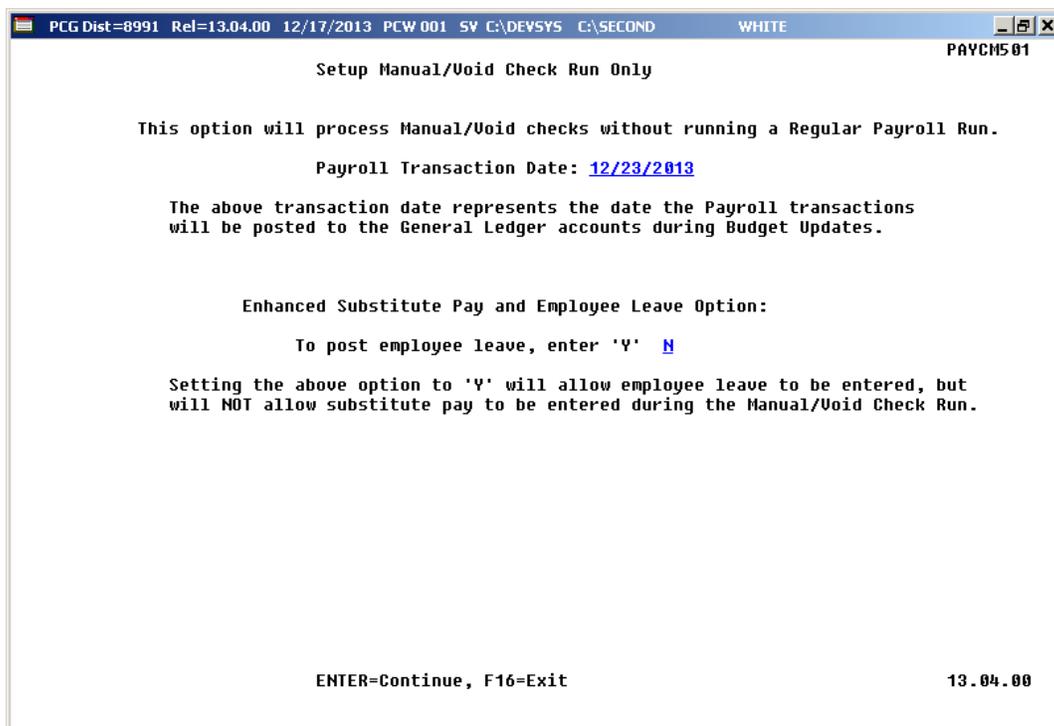
B2.6. Allow Leave to be Posted on a Manual/Void Check Run

For systems with the *Enhanced Substitute Pay and Employee Leave System* enabled, PCGenesis has been updated so that employee leave can be posted during a Manual/Void Check Run Only. If the *Enhanced Substitute Pay and Employee Leave System* is enabled, the *Setup Manual/Void Check Run Only* screen (F2, F1, F2) provides an option to allow employee leave to be posted during the Manual/Void Check Run. At the end of the **Leave Plan Year**, there is the need to be able to enter leave before the next normal payroll run. This feature will allow users to post any outstanding leave taken by employees between the last normal payroll run of the leave plan year and the end of the plan year.

Before, if the leave cutoff date for the June payroll run was June 15th, and all leave taken through June 15th was posted in the June 30th payroll, users did not have a way to enter the leave taken between June 15th and June 30th into the leave system, before running the *Plan Year Rollover* and the *Leave Advance* processes. The option to post leave on a Manual/Void Check Run solves this problem. Even when there are no manual checks or voids which need to be entered, leave will still be posted as long as the user executes all of the steps required for a Manual/Void Check Run.

Setting the leave option to ‘Y’ will allow employee leave to be entered into the *Enhanced Substitute Pay and Employee Leave System*, but will NOT allow substitute pay to be entered during the Manual/Void Check Run. Substitutes cannot be paid during a Manual/Void Check Run from the leave system.

For systems with the *Enhanced Substitute Pay and Employee Leave System* enabled, the following screen will be displayed when setting up a **Manual/Void Check Run**:



B3. Financial Accounting and Reporting (FAR) System

B3.1. Manual Vendor Check/Wire Transfer

A problem has been fixed with *Enter Manual Check/Wire Transfer* procedure (F1, F4, F7). Before, the user was able to enter a check date which was before the claim date. Since this would be paying a claim with a check date prior to the claim date, this is no longer allowed.

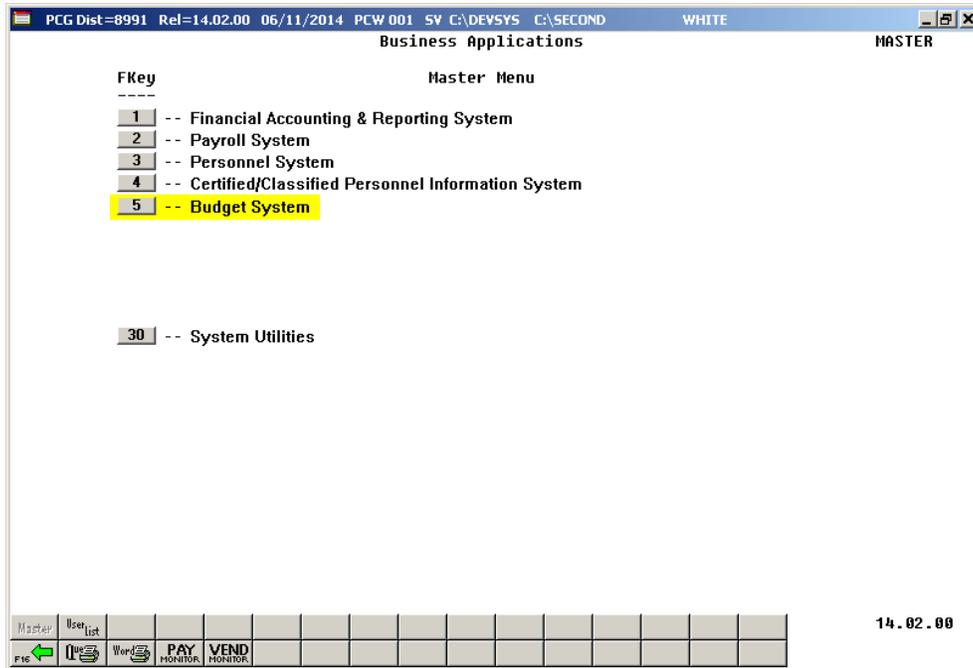
B3.2. Print Manual/Void Vendor Check Registers

A problem has been fixed with the *Preliminary Manual/Void Vendor Check Register* (F1, F4, F31) and the *Print Manual/Void Register & Register of Payments* (F1, F4, F9) modules. Before, there was a problem printing journals on the *Register of Manual Payments* vendor report. When printing a manual check register for journals (JE's) the journal headers did not print correctly. This problem has been corrected.

B4. PCGenesis Budget System

B4.1. PCGenesis Budgeting System Overview

The Georgia Department of Education (GaDOE) is pleased to announce the distribution of the *PCGenesis Budgeting System* for payroll salaries and employer benefits. This option is available by selecting **F5** (Budget System) from the *Business Applications Master Menu*. The new PCGenesis budgeting system is now available to all PCGenesis users. Using the new budgeting system is optional. School districts may continue to use their existing methods or a third party for budgeting for as long as they like.



PCGenesis Business Applications Menu

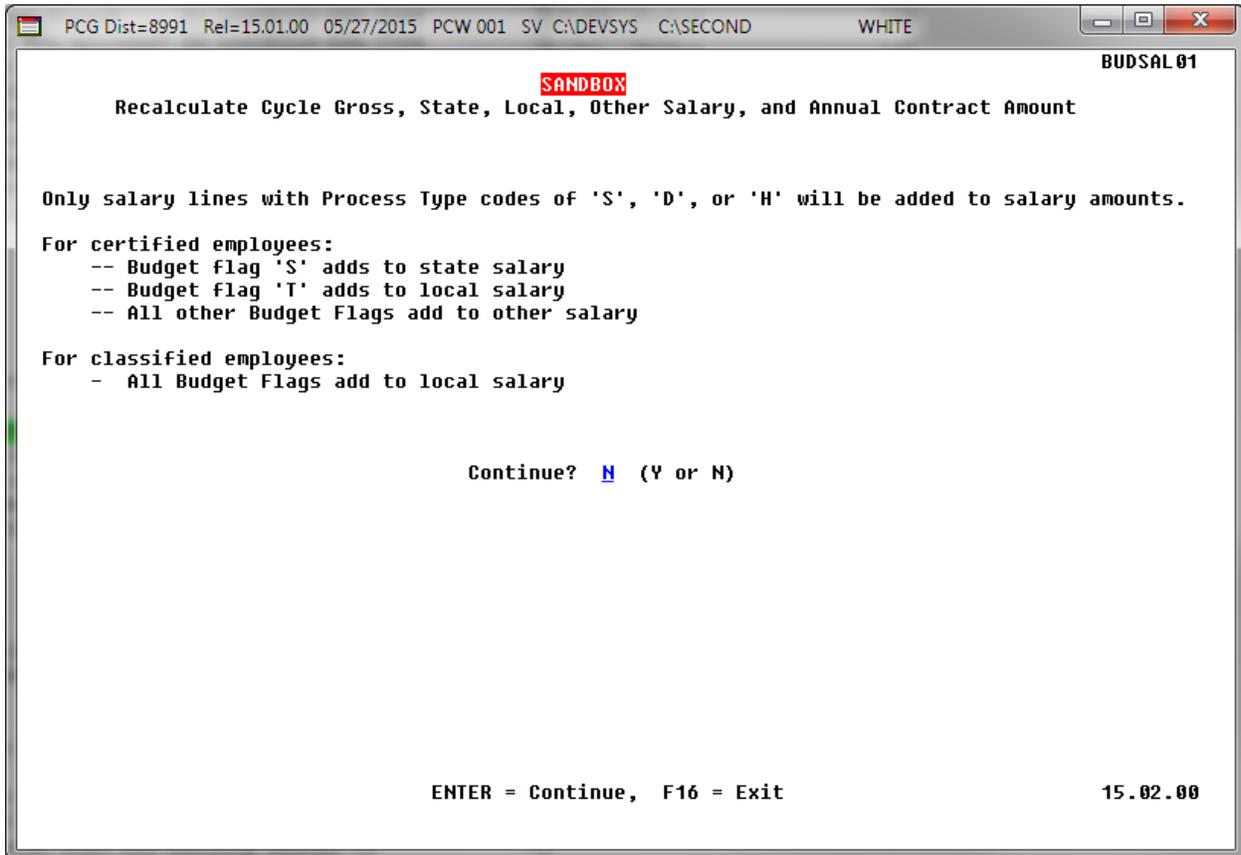
The concept of the budgeting system is to create a “playground” or “sandbox” with copies of the appropriate employee and system files so that a site can manipulate salary and benefit data in order to generate a series of budgeting reports, and also to create a .csv external file that will be used for loading the budget on the financial side. By utilizing the concept of a “playground” or “sandbox”, users may execute a variety of “what if” scenarios to model various budget outcomes without affecting their “live” payroll files.

A full description of the new PCGenesis Budget System is available on the PCG documentation website located at:

<http://www.gadoe.org/Technology-Services/PCGenesis/Pages/Budget-System-Operations-Guide.aspx>

B4.2. Recalculate Cycle Gross, State, Local, Other Salary, Annual Contract in Budget SANDBOX

A new procedure is now available from the *Budget System Master Menu*. Now, a new menu option is available entitled *Recalculate Cycle Gross, State, Local, Other Salary, Annual Contract* (F5, F4). The new process recalculates the **Cycle Gross, State, Local, Other Salary** and **Annual Contract** amounts for the employees in the Budget SANDBOX. Then, when budgeting is complete, these numbers will be ready to import back into payroll at the beginning of the fiscal year.



Recalculate Cycle Gross, State, Local, Other Salary and Annual Contract Amount in the Budget Sandbox Screen

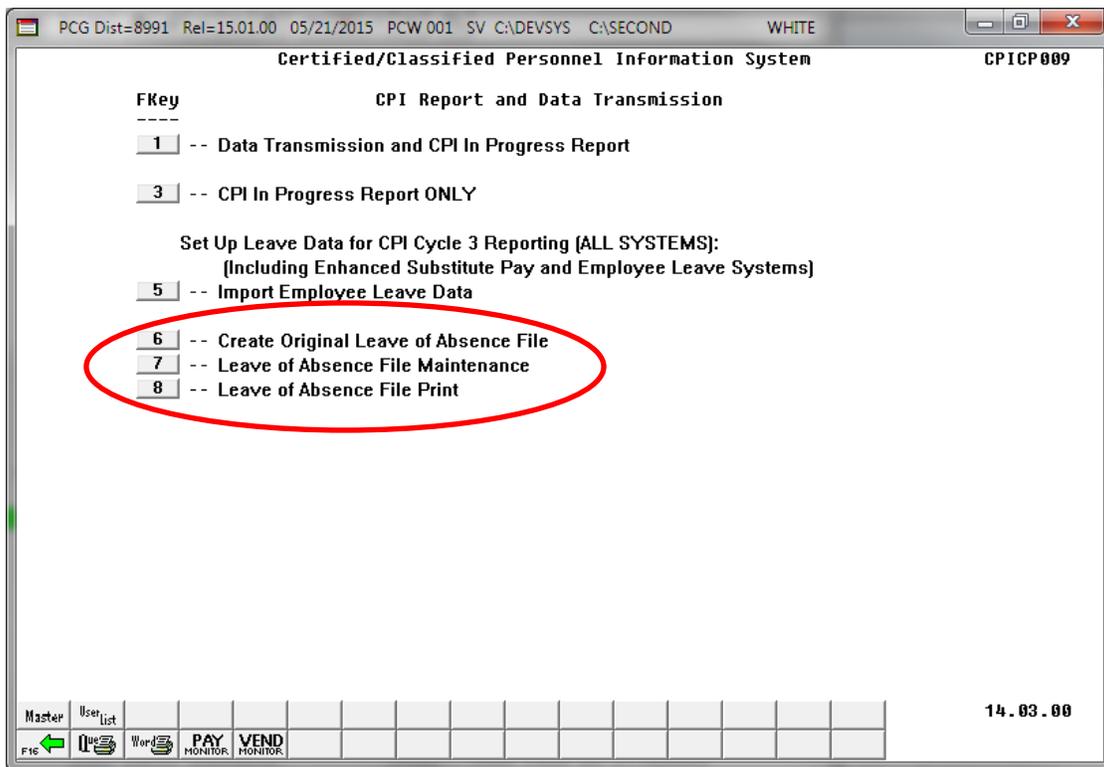
B5. Certified/Classified Personnel Information (CPI) System

B5.1. Upload the 2016 CPI State Salary Schedule

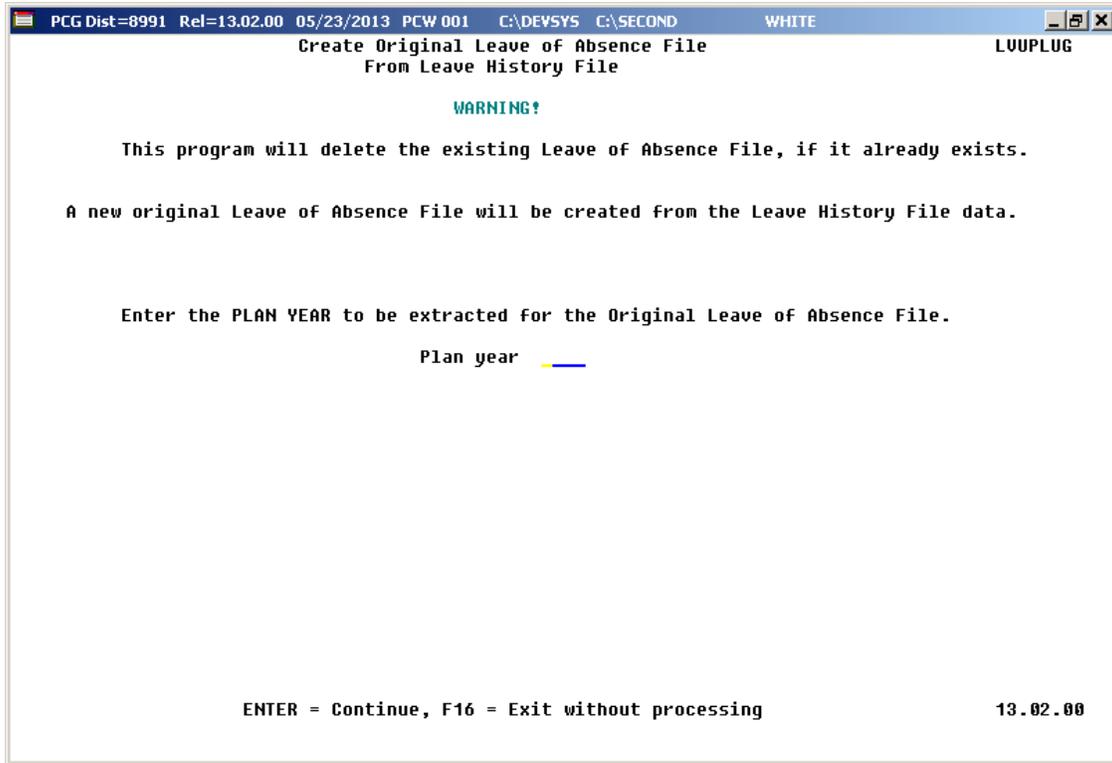
The PCGenesis documentation website provides the *PCGenesis CPI Salary Schedule.csv File – 2016*. Supporting documentation at that location provides the corresponding instructions to import the information into PCGenesis.

B5.2. Cycle 3 Leave Reporting – Enhanced Substitute Pay and Employee Leave System

For users of the *Enhanced Substitute Pay and Employee Leave System*, the *Create Original Leave of Absence File* procedure (F4, F9, F6) has been updated so that the *Original Leave of Absence File* is created from the leave data contained in the *Leave History File*.



The *Create Original Leave of Absence File* procedure has been updated so that the user must enter the **Plan Year** to use when extracting leave data from the *Leave History File*, as shown in the screenshot below. The *Create Original Leave of Absence File* procedure will automatically pull all leave taken in the specified plan year into the *Leave of Absence File*. The data in the *Leave of Absence File* is then used to produce the *Cycle 3 CPI Transmission File*.



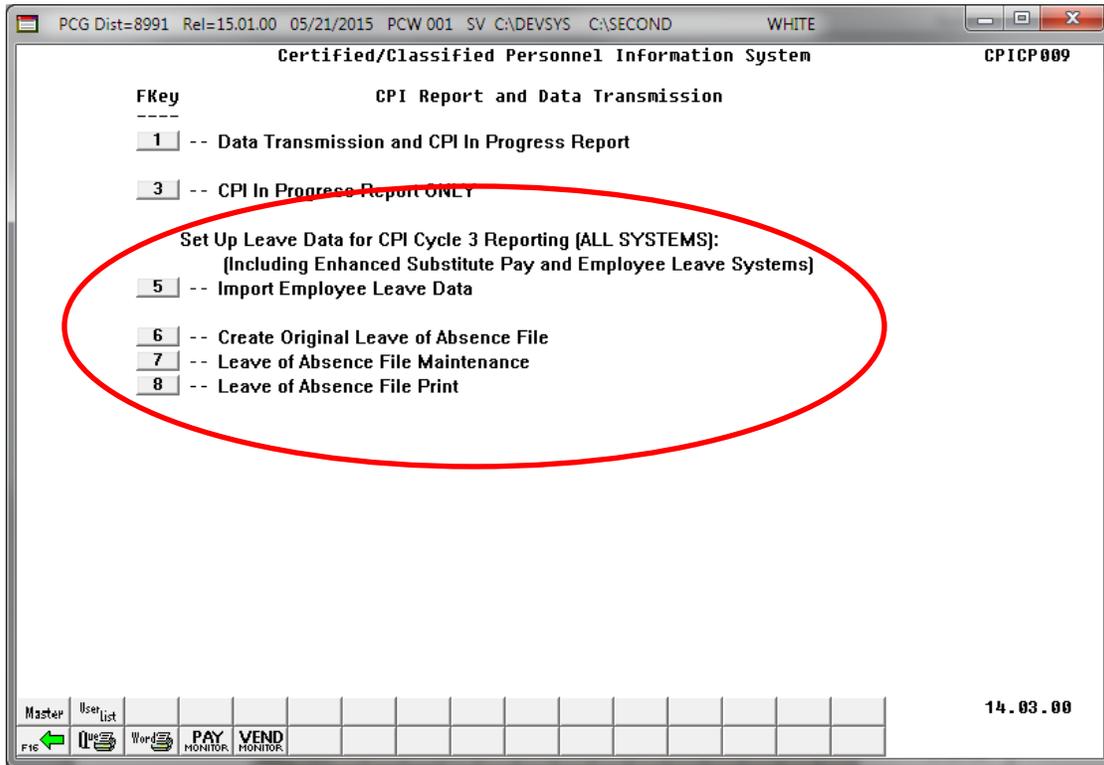
Staff Development leave is now brought over from the *Leave History File* data. The staff development leave hours will be created on the *Leave of Absence File Maintenance* screen with a type code of **STAF**. Also, the *Create Original Leave of Absence File* will now add Sick Bank taken time to *Absence Type SLST*.

B5.3. Cycle 3 Leave Reporting – Legacy Leave Systems

An *Import Employee Leave Data* (F4, F9, F5) option has been added to the *Legacy Leave Menu* screen which allows the user to import employee leave data for CPI reporting. The *Import Employee Leave Data* procedure allows for the upload of current leave, year-to-date leave, and leave balances via a comma separated (.csv) file. The completion of this procedure allows these totals to be printed on the employees' pay stubs. However, if the user does not wish to print the imported leave data on the employees' pay stub, the leave data may be suppressed from printing on the check.

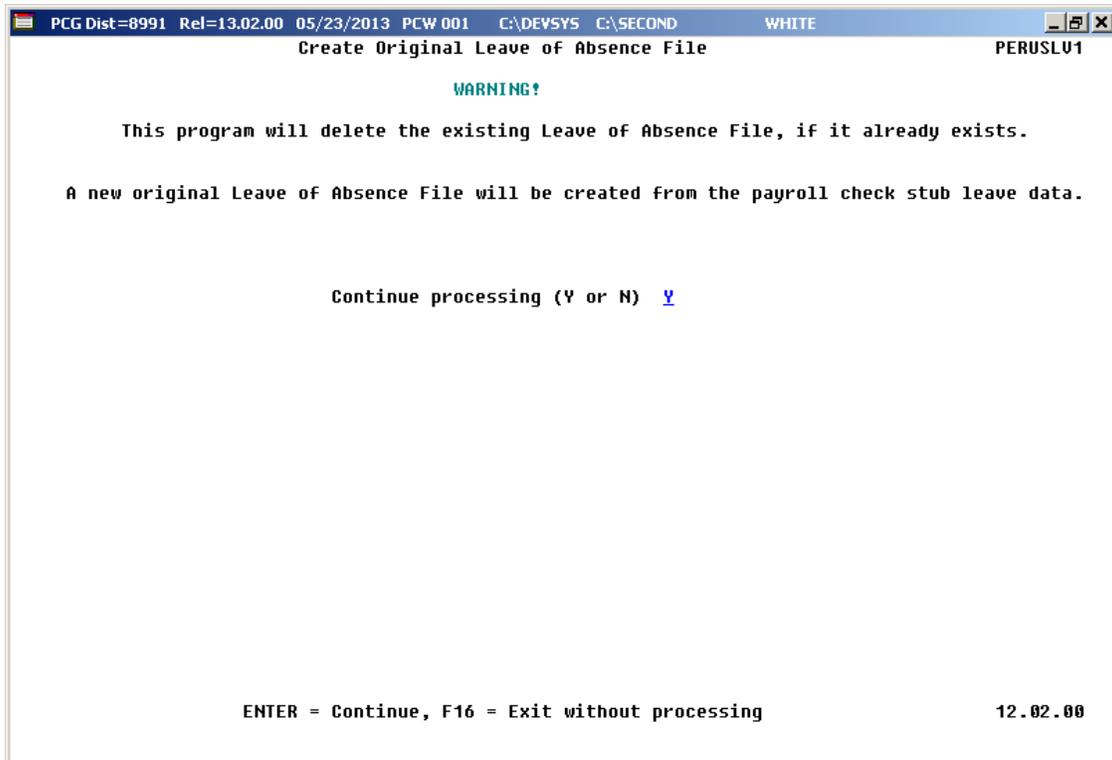
If leave data is only being imported for the purpose of CPI reporting and is not being imported to print on checks, the user may go to the *Payroll Control Information* screen (F2, F13, F3, F9) and set 'Print Leave on Checks' to 'N' on the *Payroll Identification* record. This allows users to populate the current used, year-to-date used, and balance fields for leave without necessarily printing the information on employees' pay stubs. This is convenient if the only purpose for loading the leave data is to produce the Cycle 3 *CPI Transmission File*.

If leave data has already been loaded during the payroll process from a third party leave management system, it is not necessary to import leave using this new option.



The *Create Original Leave of Absence File* procedure (F4, F9, F6) has been updated. If leave data has been imported (F4, F9, F5) or keyed into payroll as described above, the original *Leave of Absence File* will be created using leave data from payroll. If leave data has NOT been entered into payroll, the original *Leave of Absence File* will be created as an empty file.

The *Create Original Leave of Absence File* procedure has been updated so that the user must confirm their intention to run this process. Before, this process would run immediately when the user selected the *Create Original Leave of Absence File* option from the menu, with the result that whatever data had been keyed into the *Leave of Absence File* could be deleted unexpectedly. Now, the user must confirm their intention to recreate the *Leave of Absence File*.



Staff Development leave is now brought over from the payroll leave data. The staff development leave hours will be created on the *Leave of Absence File Maintenance* screen with a type code of **STAF**. Also, the *Create Original Leave of Absence File* will now add Sick Bank taken time to *Absence Type SLST*.

B5.4. Cycle 3 Leave Reporting – All Systems

The *Data Transmission and CPI In-Progress Report* (F4, F9, F1) and the *CPI In Progress Report ONLY* (F4, F9, F3) options have been updated so that the leave data extracted in *Cycle 3 CPI Transmission File* will be printed on the report. Before, a summary report of the *Cycle 3 CPI Transmission File* was not provided. The new report for Cycle 3 will allow users to verify the leave data being sent to the GaDOE for Cycle 3 CPI reporting.

RUN DATE: 05/23/2013		CPI DETAIL IN-PROGRESS REPORT										PROGRAM: CPICM401		
REPORT TIME: 10:16:00												PAGE: 5		
899 SMITH CITY BOARD OF EDUCATION														
SSN	EMPNO CERT EMP BASIS	CLASS EMP BASIS	EMPLOYEE NAME				CERT	CERT ID	LEV	PAY STEP	YRS EXP	GHI PART	CONTRACT SALARY	TERMINATION DATE
			SICK	STAFF	VAC	OTHER								
999088631	088631 1.000	AM2ROSE, SHANTAY	2	2		(C)	410858	T5 L3	15	N		53118.00		
999088632	088632 .500	COSCORAN, DANNY	1			(C)	458787	T5 L1	12	Y		25040.50		
999088639	088639 1.130	DOZAN, UL2SSES	1	6		(C)	422347	T6 L2	14	Y		70650.00		
999088645	088645 1.000	TI4LEY, ST4NNY	7	4		(C)	418843	T5 7	10	Y		50628.00		
999088648	088648 1.000	CASRIER, QUANCY	2			(C)	285914	T5 L5	19	Y		56341.00		

Section C: Installation Instructions for Release 15.02.00 Software

C1. Perform a PCGenesis Full Backup

When the prior evening's backup was successful, and when installing *Release 15.02.00* before performing any work in PCGenesis for the day, proceed to C2. *Install PCGenesis Release*. In addition to its current labeling, also label the prior evening's backup CD/DVD/tape as "**Data Backup Prior to Release 15.02.00**". Continue to use the backup CD/DVD/tape in the normal backup rotation.

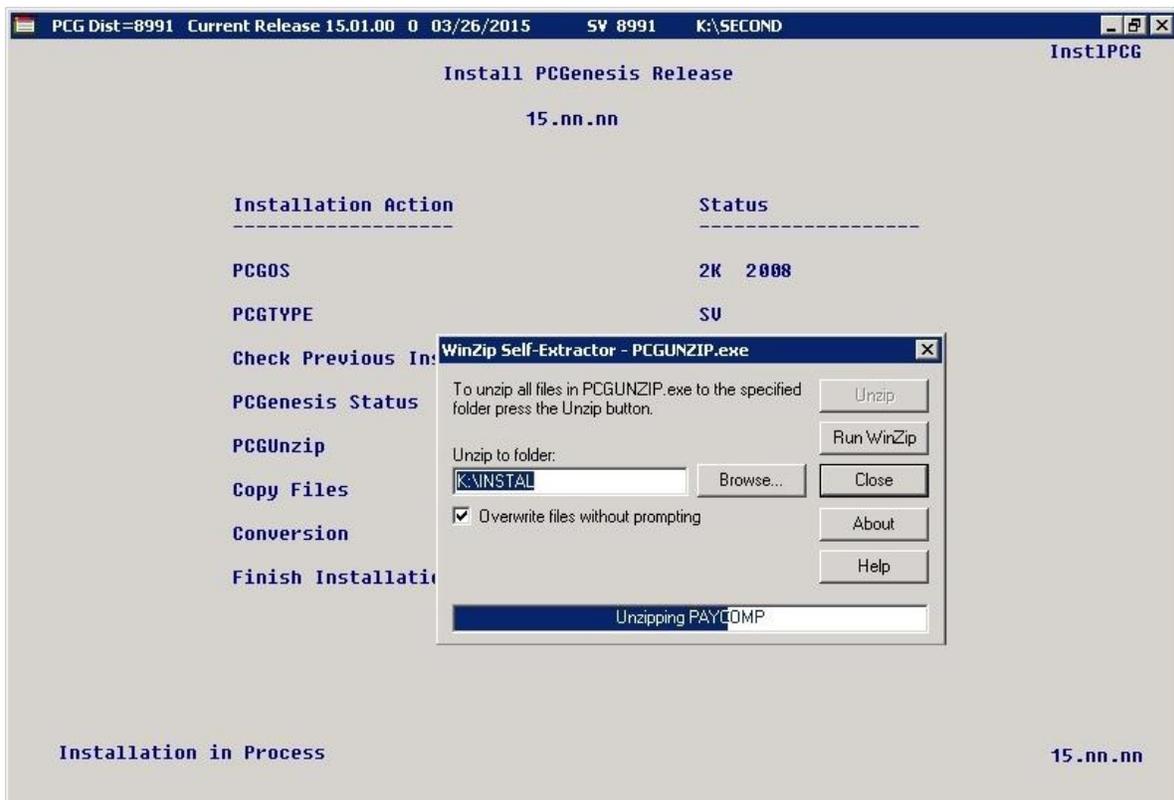
Step	Action
1	Verify all users are logged out of PCGenesis.
2	Close <i>Uspool</i> at the server.
3	Perform a PCG Full Backup to CD or DVD or Tape.
4	When the PCGenesis backup completes, label the backup CD or DVD or tape " Full System Backup Prior to Release 15.02.00 ".
5	Proceed to C2. <i>Install PCGenesis Release 15.02.00</i> .

C2. Install PCGenesis Release 15.02.00

FROM THE PCGENESIS SERVER

Step	Action
1	Verify all users are logged out of PCGenesis.
2	Open Windows® Explorer.
3	Navigate to the K:\INSTAL directory.
4	Verify PCGUNZIP.EXE , RELINSTL.BAT , and INSTLPCG display. <i>If PCGUNZIP.EXE and RELINSTL.BAT and INSTLPCG do not display, return to the MyGaDOE Web portal, and detach the files from the Web portal again.</i>
5	Double-click RELINSTL.BAT to perform the installation. <i>A status screen will display showing the release steps as they are completed.</i>

A screen will display showing the progress of the installation:

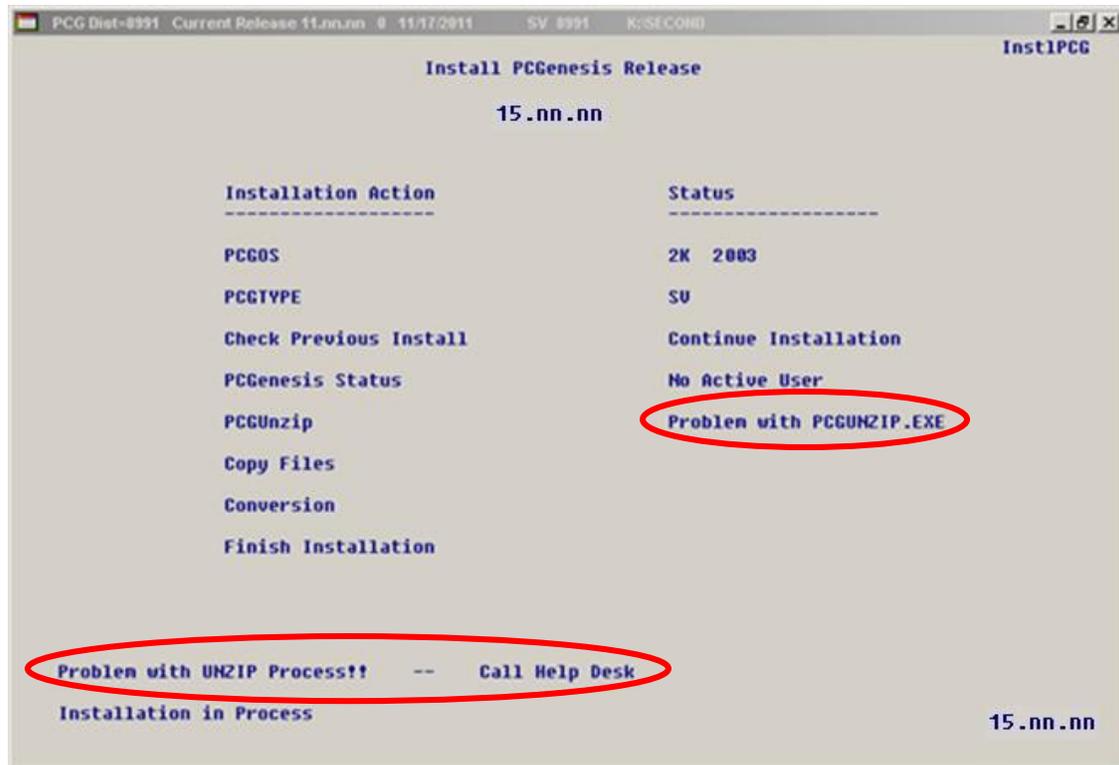


For PCGenesis Release 15.02.00 successful installations, the following message displays:



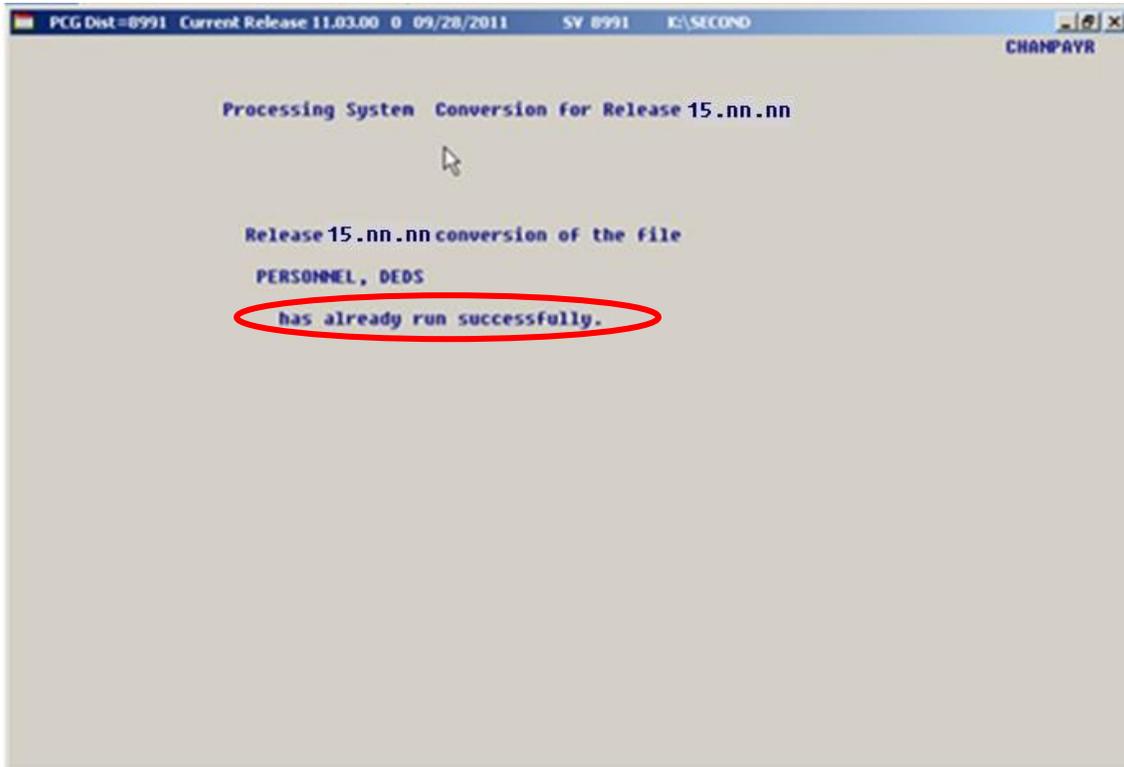
Step	Action
6	Select Enter to close the window.
7	<p>If the installation was successful: Proceed to C3. <i>Verify Release 15.02.00 Was Successfully Installed.</i></p> <p>If the installation was unsuccessful: Proceed to Step 8.</p>

A problem message displays if an error occurred:

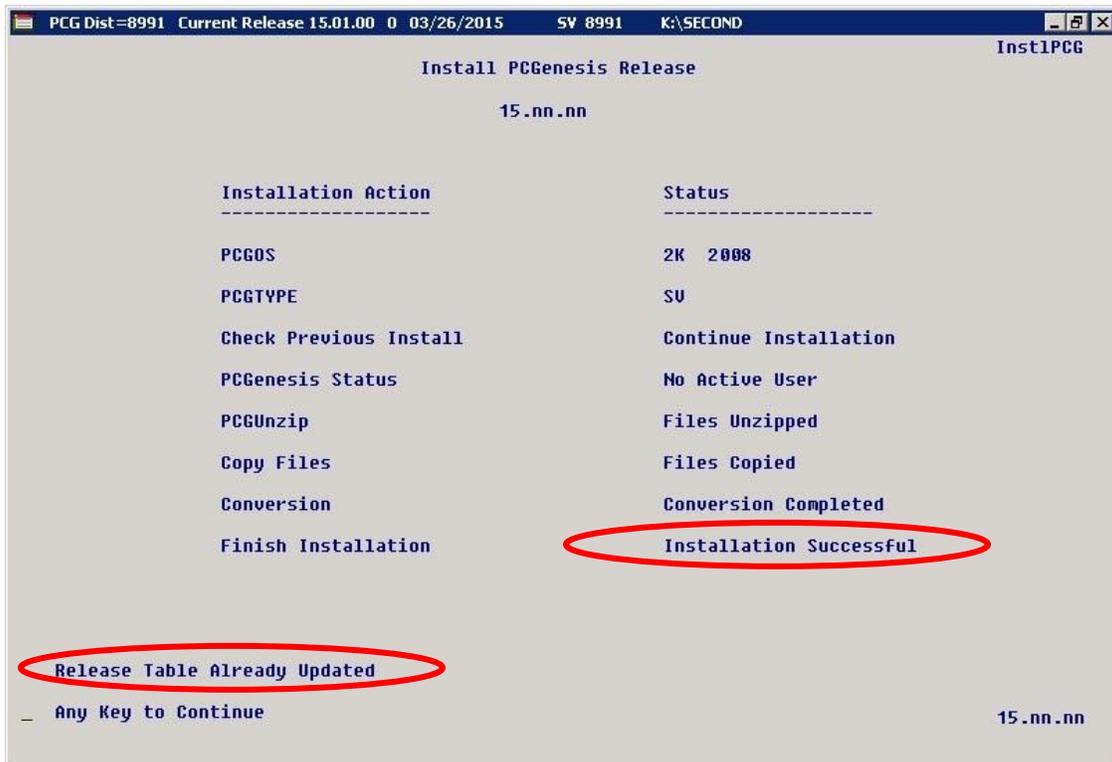


Step	Action
8	Select F16 to close the window.
9	Return to the <i>MyGaDOE</i> Web portal, and detach the files again.
10	<i>Contact the Technology Management Customer Support Center for additional assistance if needed. A description of the error will display with instructions to call the Help Desk.</i>

A warning message will display if the release installation is repeated:



A warning message will display if the release installation is repeated, but in this case, the installation is considered successful. In this instance, select any key to continue:

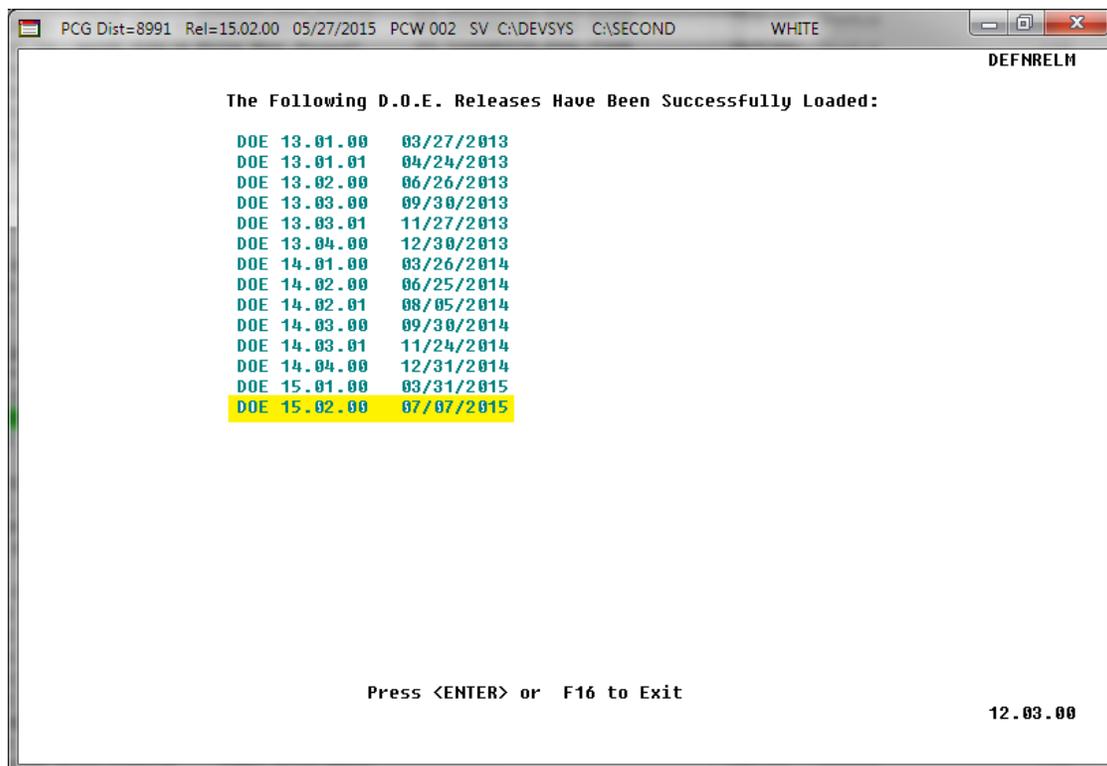


Step	Action
11	Proceed to C3. <i>Verify Release 15.02.00 Was Successfully Installed.</i>

C3. Verify Release 15.02.00 Was Successfully Installed

Step	Action
1	Log into PCGenesis.
2	From the <i>Business Applications Master Menu</i> , select 30 (F30 - System Utilities).
3	From the <i>System Utilities Menu</i> , select 17 (F17 - Display Current Release Number).

The following screen displays:



Step	Action
4	Verify Release 15.02.00 displays. <i>The number of releases and the release installation date displayed may not correspond with the preceding screenshot example. This is acceptable as long as DOE 15.02.00 displays. If Release 15.02.00 does not display, contact the Technology Management Customer Support Center for assistance.</i>
5	Select Enter .
6	Log off the PCGenesis server.
7	Verify users remain logged out of PCGenesis.

C4. Perform a PCGenesis Full Backup After Release 15.02.00 is Installed

Step	Action
1	Verify all users are logged out of PCGenesis.
2	Close <i>Uspool</i> at the server.
3	Perform a PCG Full Backup to CD or DVD or Tape.
4	When the PCGenesis backup completes, label the backup CD or DVD or tape “ Full System Backup After Release 15.02.00 ”.

Section D: After PCGenesis Release 15.02.00 Has Been Installed

D1. Post Installation Checklist

Contact the Technology Management Customer Support Center for assistance as needed.		
✓	Step	Action
Pension Compliance Reporting		
	1	Update all employees who are <u>not</u> enrolled in a public pension (Pension Code = 0) with the new No Pension Code field on the <i>Update/Display Gross Data</i> screen. <u>Reference:</u> Refer to this document - <i>Section B1.4. Add No Pension Code to Update/Display Gross Data</i> . <u>Reference:</u> Refer to this document - <i>Section B1.10. Export/Import Selected Payroll/Deduction/CPI Information</i> . Select F10 (Set Employee Filter) to select active employees with Pension Code = 0 .
	2	Update the ERS Job Class code for each <i>Job Description</i> record (' J ' record) on the <i>Payroll Description File</i> . School districts should contact their ERS representative concerning the actual coding of the job class. GaDOE personnel are not able to assist in this area. <u>Reference:</u> Refer to this document - <i>Section B1.5. Description File – Job Description Records</i> .
Affordable Care Act (ACA) Compliance		
	3	Highly Recommended – Review the Affordable Healthcare Act regulations and instructions. <u>Reference:</u> Refer to the IRS' website at: www.IRS.gov .
	4	Highly Recommended - Print the <i>Affordable Healthcare Worksheets</i> to identify employees who may need to be manually coded for the Affordable Care Act IRS 1095-C form. <u>Reference:</u> Refer to this document - <i>B2.5. Print Affordable Care Act Worksheet</i> .
Certified/Classified Personnel Information (CPI) System		
	5	Import the 2016 CPI Salary Schedule into PCGenesis. The 2016 CPI Salary Schedule is available on the PCGenesis documentation web page.