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

7/1/2019

Section F: CPI In-Progress Report and Transmission File Processing, V2.10

Revision History

Date	Version	Description	Author
7/1/2019	2.10	19.02.00 – Increased assignments from 6 to 15. Add button bar to screenshots.	D. Ochala
12/03/2018	2.9	18.03.01 – Remove **Infield Status** field from reports.	D. Ochala
02/02/2018	2.8	18.01.00 – Update menu screenshots.	D. Ochala
04/06/215	2.7	15.01.00 – Moved documentation relating to the *Original Leave of Absence File* from the *Personnel System Legacy Leave* menu to this document.	D. Ochala
10/10/2013	2.6	13.03.00 – Update CPI In-Progress Report example for Cycle 1 and 2.	D. Ochala
06/27/2013	2.5	13.02.00 – Added example report for CPI Cycle 3 transmission.	D. Ochala
10/11/2011	2.4	11.03.00 – Added CPI Cycle 3 information in *Overview* section.	D. Ochala
03/31/2009	2.3	09.01.00 - Section title changed to "*Section F".*	C. W. Jones
10/02/2008	2.2	08.03.00 - Added *Long term sub (Long term substitute)?* information.	C. W. Jones
08/01/2008	2.1	08.02.00 – Updates to screenshots, no programmatic changes.	C. W. Jones
09/27/2007	2.0	07.03.00 – Added PCGenesis transmission file processing information for two employee numbers/same SSN within the *Overview*.	C. W. Jones

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Overview

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

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

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

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

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

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

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

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

Leave information – Dnn record: The leave information (Dnn records) contains the total number of days used for the following categories: paid sick, paid staff development, paid vacation and other paid leave. There can be up to five Dnn records for each employee. If the employee earns leave for more than two assignments and the leave earned in each assignment is independent of the leave earned in the other assignment(s), then two or more leave records MUST be reported. Long term substitutes and third-party contractors do not report leave information (Dnn records) to the GaDOE. **The Dnn records are submitted to the GaDOE for CPI reporting period 3 ONLY.**

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

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CPI Cycle 3 Leave Reporting

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

CPI Cycle 3 Leave Reporting Checklist Payroll and Personnel Phases			
√	**Step**	**Action**	
	1	**PCGenesis Leave System Users Only**: Executing all of *Step 1* assumes that leave data is already available in PCGenesis. This is the case if employee leave data is displayed on the *Update/Display Balance and YTD Leave* screen. • The leave data on the *Update/Display Balance and YTD Leave* screen may have been imported from a third party leave system during payroll processing. • Leave data will also be available for users of the new *Enhanced Substitute Pay and Employee Leave System*. *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure E: Updating/Displaying Leave Data*	
		1.1	Create the *Original Leave of Absence* file. The *Original Leave of Absence File* will be created using leave data from payroll. *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 3: Creating the Original Leave of Absence File*
		1.2	Skip *Step 2* and proceed to *Step 3*.

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CPI Cycle 3 Leave Reporting Checklist Payroll and Personnel Phases - Continued			
✓	**Step**	**Action**	
	2	**Import Leave Data for CPI Reporting Only**: Executing all of *Step 2* assumes that leave data is NOT currently available in PCGenesis. This is the case if there is no employee leave data displayed on the *Update/Display Balance and YTD Leave* screen. *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure E: Updating/Displaying Leave Data*	
		2.1	**To suppress printing leave on checks/direct deposits**: Set the **Print Leave on Checks** option to '**N**' on the *Payroll Control Information* screen. This will allow leave data to be imported into PCGenesis without having the data appear on employees' pay statements. *Payroll System Operations Guide, Section I: Special Functions, Topic 3: Tax Tables/Withholding/Control Information Processing*
		2.2	**Optional**: Perform the *Import Employee Leave Data* function on the *Legacy Leave Menu* in order to import leave data into the PCGenesis system. *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 2: Import Employee Leave Data*
		2.3	Create the *Original Leave of Absence* file. • If leave data has been imported (*Step 2.2*) or keyed into the data entry payroll screens, 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. *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 3: Creating the Original Leave of Absence File*
	3	Maintain the *Leave of Absence* file as needed. *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 4: Leave of Absence File Maintenance*	
	4	Print the *Leave of Absence* file. *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 5: Printing the Leave of Absence Report*	

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

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

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

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

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

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

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

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

The table below illustrates how the 27 leave types in the *Leave of Absence File* are extracted for CPI processing into the four valid CPI leave categories.

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

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

- Payroll Sick Leave will be created in the *Leave of Absence File* with Absence Type **SLST**, Sick Leave – Standard.
- Payroll Personal Leave will be created with Absence Type **PER1**, Personal Leave.
- Payroll Vacation Leave will be created with Absence Type **VAC1**, Vacation Pay.
- Payroll Unpaid Leave will be created with Absence Type **SLWP**, Sick Leave w/o Pay.
- Payroll Other Leave will be created with Absence Type **ZOT1**, Other Approved Leave.
- Payroll Staff Development Leave will be created with Absence Type **STAF**, Staff Development.
- Payroll Sick Bank Taken Leave will be created with Absence Type **SLST**, Sick Leave – Standard.

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

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

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

The table below illustrates how the 27 leave types in the *Leave of Absence File* are extracted for CPI processing into the four valid CPI leave categories.

Summary: **Sick**, **Sick Bank Taken**, and **Personal** leave data from payroll will be reported in CPI as **SICK**. **Other** and **Unpaid Leave** from payroll will be reported in CPI as **OTHER**. V**acation** data from payroll will be reported in CPI as **VACATION**. **Staff Development** leave data from payroll will be reported in CPI as **STAFF**.

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

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Payroll Category	Leave of Absence File Category	CPI Cycle '3' Transmission File Category
	BERE – Bereavement/Relig. Leave	Sick Leave
	FAM1 – Fam/Med Paid using Sk Lv	Sick Leave
	FAM2 – Family/Med Leave w/o Pay	Other
	FT01 – Field Trip	Other
	FT02 – Field Trip w/o Pay	Other
	JURY – Jury Duty	Other
	MIL1 – Military Leave	Other
	NONW – Non Worked Tracking	Other
Personal	**PER1** – Personal Leave	Sick Leave
	PER2 – Personal Leave w/o Pay	Other
	PROF – Professional Dev/Planning	Staff Development
	SBCC – Sk Bk Cont frm Exc Cryovr	Other
	SBCS – Sk Bk Cont frm Stnd Quota	Other
	SBLC – Sk Bk Leav frm Exc Cryovr	Other
	SBLS – Sk Bk Leav frm Stnd Quota	Sick Leave
	SBUS – School Business	Other
	SLEC – Sick Leave, Excess Cryovr	Sick Leave
Sick Leave	**SLST** – Sick Leave – Standard	Sick Leave
Sick Bank Taken	**SLST** – Sick Leave – Standard	Sick Leave
Unpaid Leave	**SLWP** – Sick Leave w/o Pay	Other
Staff Development	**STAF** – Staff Development	Staff Development
	SUBP – Subpoena	Other
Vacation	**VAC1** – Vacation Pay	Vacation
	VAC2 – Vacation w/o Pay	Other
	WRC1 – Wrk Comp Paid using Sk Lv	Sick Leave

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Payroll Category	Leave of Absence File Category	CPI Cycle '3' Transmission File Category
	WRC2 – Wrk Comp w/o Pay frm Schl	Other
Other	**ZOT1** – Other Approved Leave	Other
	ZOT2 – Other Leave w/o Pay	Other

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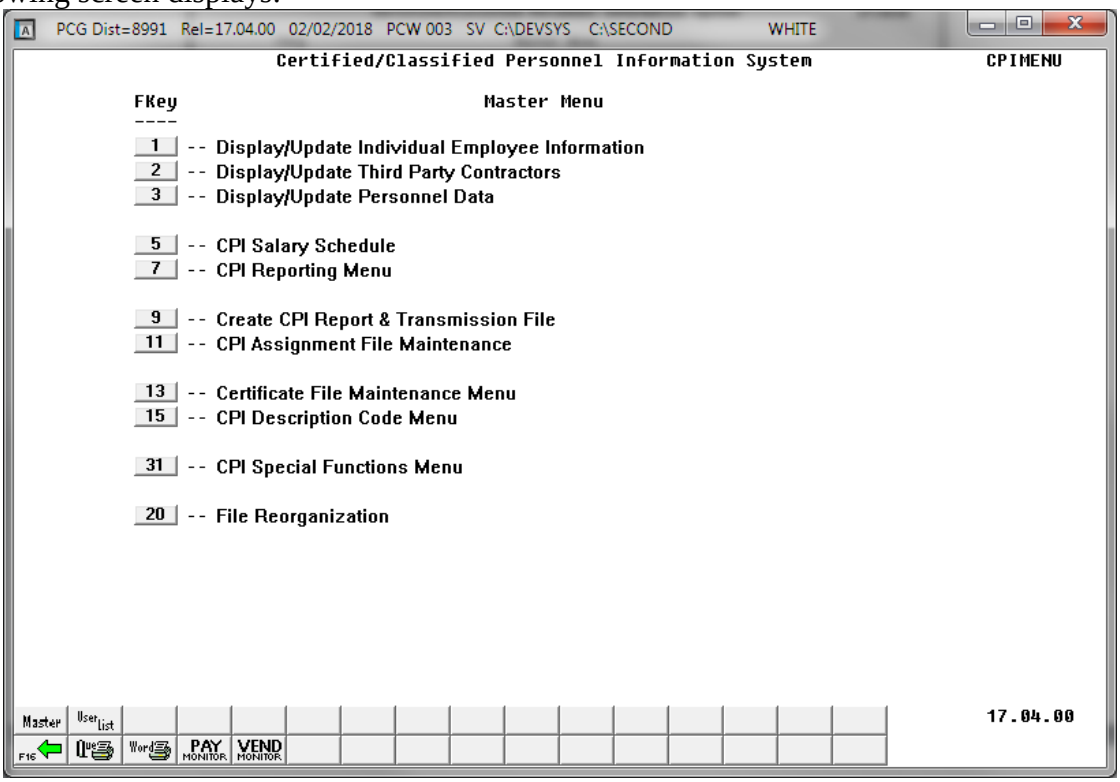
Topic 1: Creating the CPI In-Progress Report and/or the CPI Data Transmission File

1A. CPI In-Progress Report ONLY

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

The following screen displays:



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

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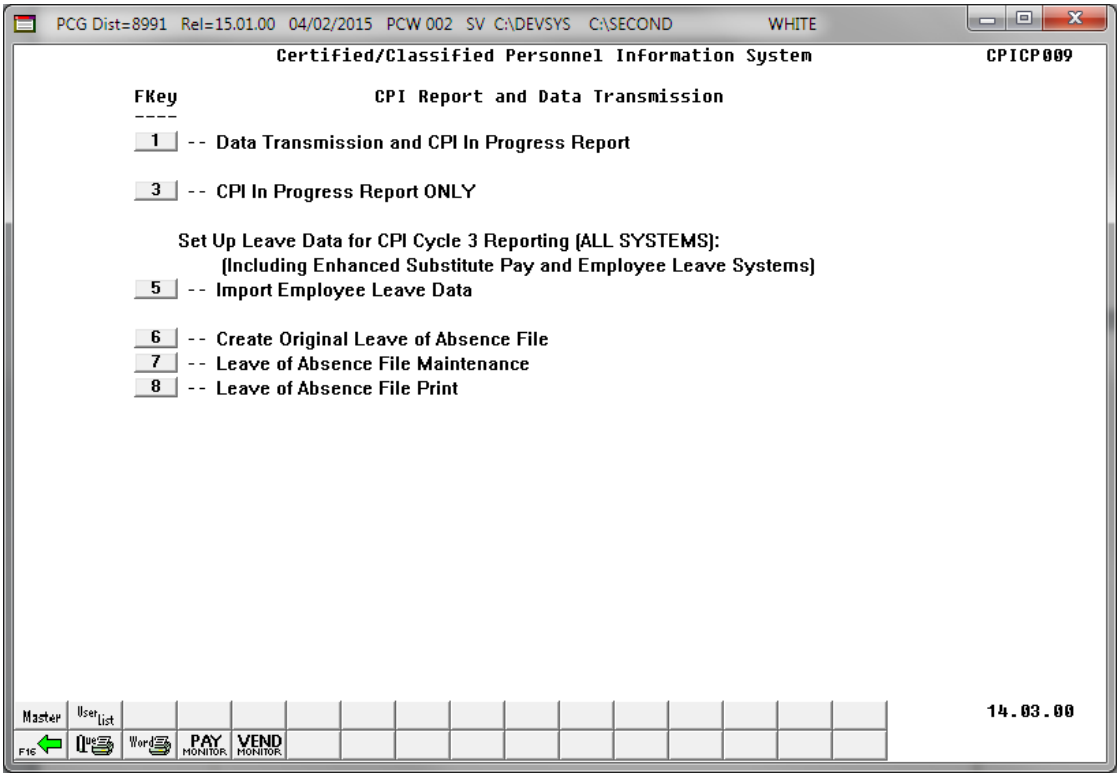
The following screen displays:



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

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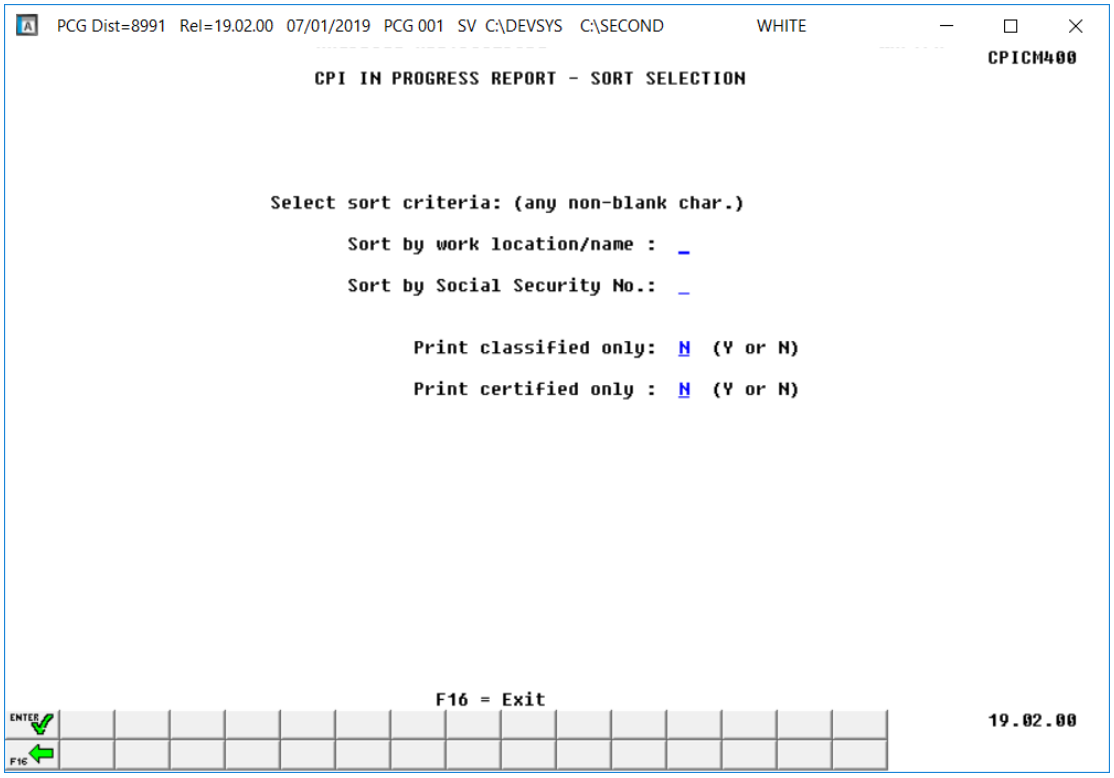
The following screen displays:



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

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

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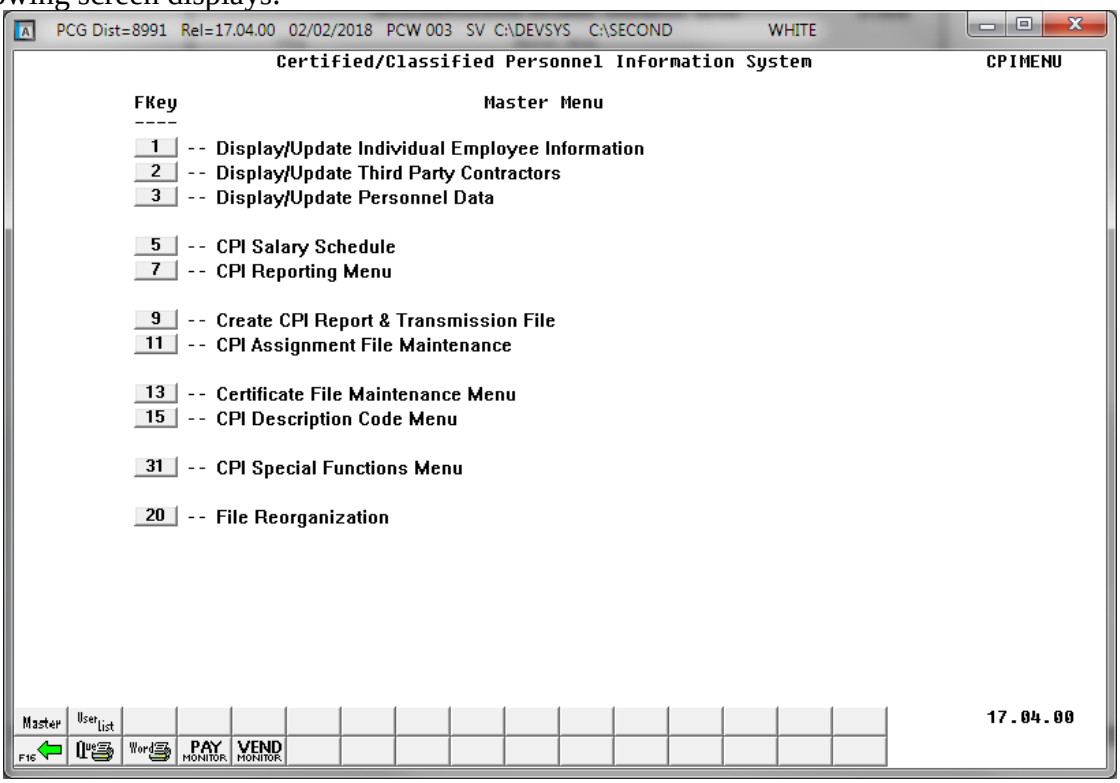
1B. Creating the Data Transmission File and the CPI In-Progress Report

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

The following screen displays:



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

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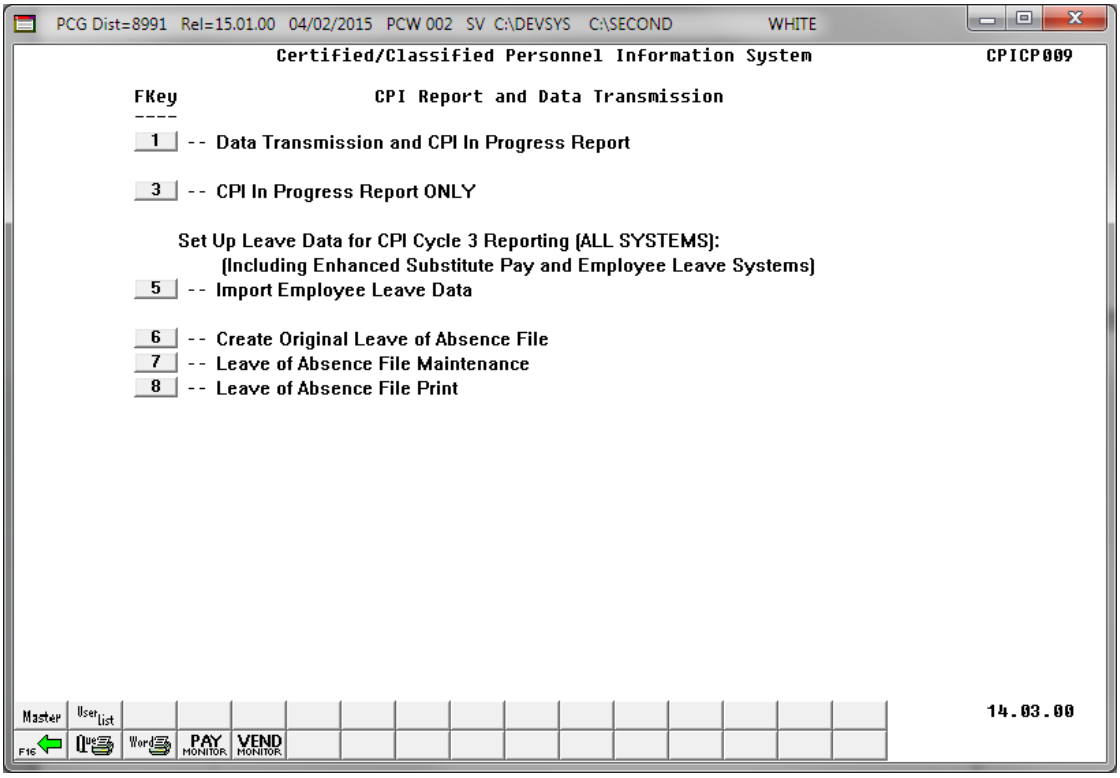
The following screen displays:



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

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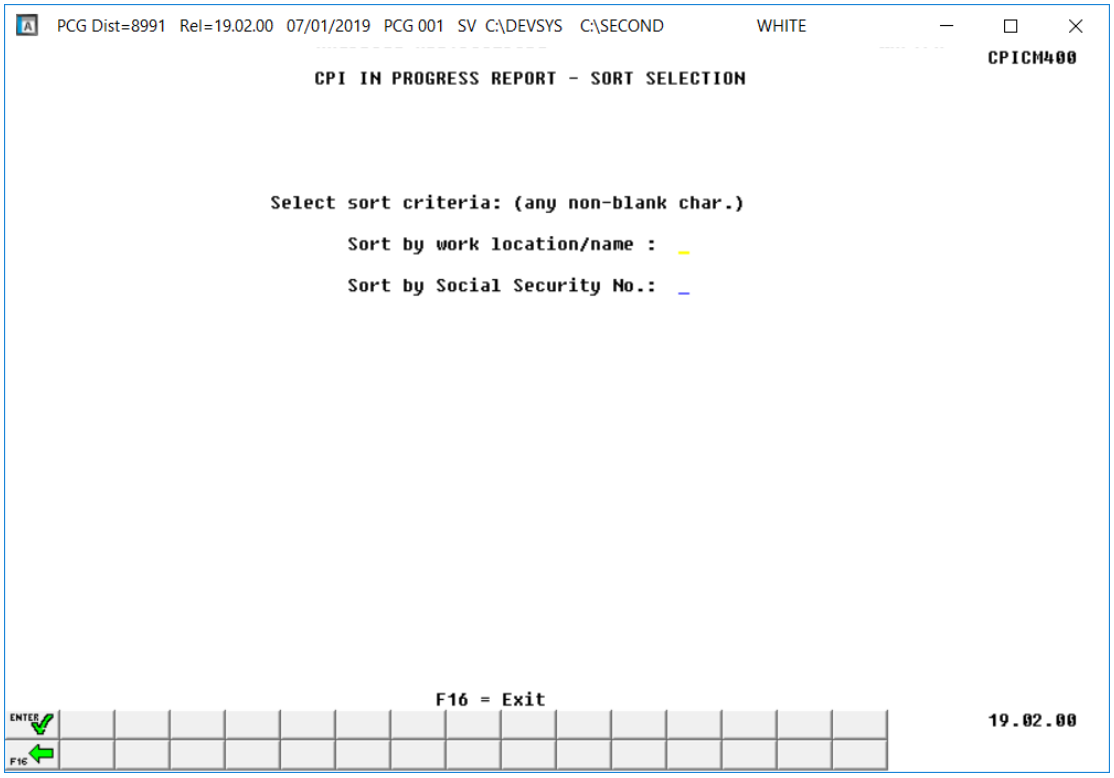
The following screen displays:



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

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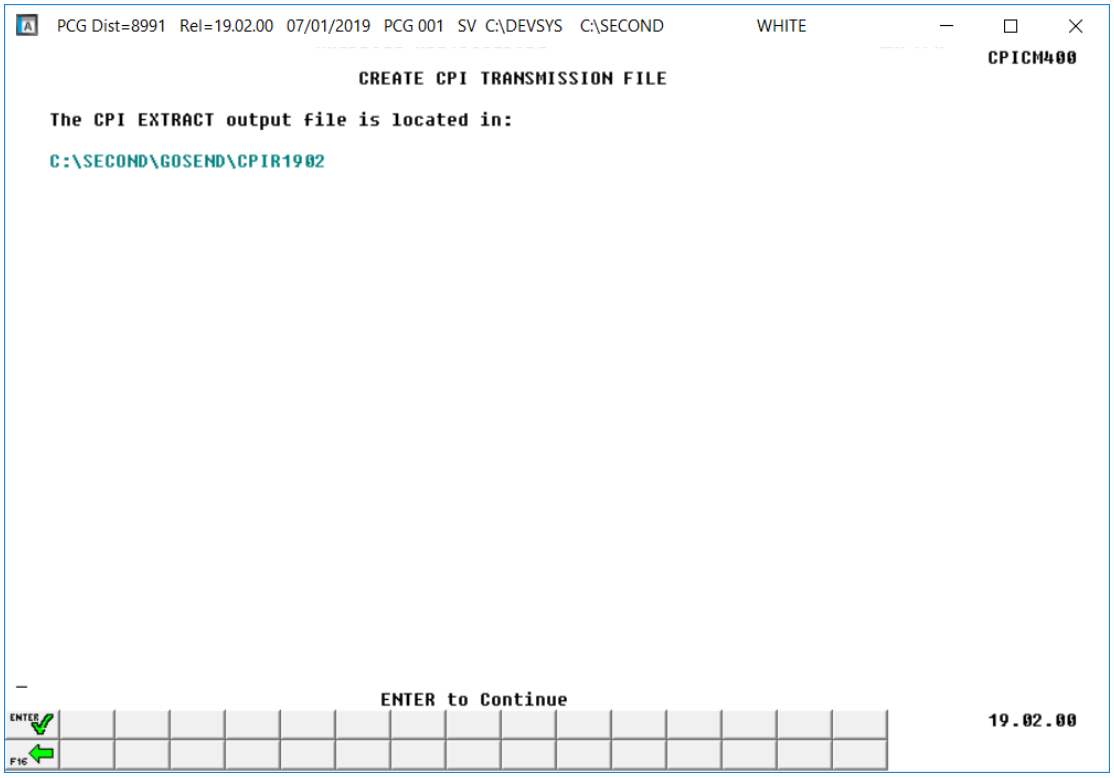
The following screen displays:



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

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

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

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

```
  REPORT ID:  CPICM401-DT                          CPI DETAIL IN-PROGRESS REPORT                                          PAGE:    3
 REPORT DATE:  12/03/2018                                                                                          REPORT TIME: 14:41:00

899   SMITH CITY BOARD OF EDUCATION     WORK LOCATION:  100  Location 000100                SORT ORDER: LOCATION, LAST NAME

SSN        EMPNO          EMPLOYEE NAME                                CERT    CERT ID
           CERT    CLASS                                                      SEC  CONSOL
            EMP     EMP   CRT   LOC   PRCNT      LEV   JOB SUBJ  FLD  TYP  FUND  FUND  PAY    YRS  GHI     CONTRACT   TERMINATION
           BASIS   BASIS  C/N                                                                STEP   EXP  PART     SALARY      DATE

999087211  087211  DO7GHTY, EM7RY                                  (C)      369624
           1.000           C    100   25.0       T7   159  238  798  SRT         N     L6    27    Y      76617.00

                           C    100   25.0            159  278  798  SRT         N

                           C    100   25.0            159  418  798  SRT         N

                           C    100   25.0            159  458  798  SRT         N

999089752  089752  DU6OSE, SE6A                                    (N)
                    1.000  N    100  100.0            410  000                  N                Y      16535.40

999088362  088362  EA3LY, MY3L                                     (C)
           1.000                         .0                                                       N

999087465  087465  EG9LESTON, CA9OYLN                              (C)      318784
           1.000           C    100   59.0       T5   104  230  808  SRT         N     L6    32    N      61289.00

                           C    100   13.0            133  920  808  SRT         N

                           C    100   28.0            146  962  881  SRT         N

999089806  089806  FA6LK, GR6GORIO                                 (C)     1209335
           1.000           C    100   35.0       T5   103  230  808  SRT         N      6     8    Y      47465.00

                           C    100   35.0            103  450  808  SRT         N

                           C    100   30.0            132  920  808  SRT         N

999087225  087225  FE4RARA, HE4IBERTO                              (N)     1665119
                    1.000  N    100  100.0            436  000             51   N                N      10467.84    03/16/2018

999089170  089170  GA6NON, SI6ENA                                  (N)     1449156
                    1.210  N    100  100.0            435  000                  N                Y      33006.40

999088960  088960  GI5LETTE, PA5TY                                 (C)      204783
           1.000           C    100   50.0       T5   440  999  813  SRS         N     L6    29    N      61639.00
```


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

```
  REPORT ID:  CPICM401-DT                          CPI DETAIL IN-PROGRESS REPORT                                    PAGE:    4
 REPORT DATE:  06/27/2013                                                                                   REPORT TIME: 08:50:00

899   SMITH CITY BOARD OF EDUCATION

SSN        EMPNO          EMPLOYEE NAME                                CERT  CERT ID
           CERT    CLASS
            EMP     EMP        SICK       STAFF       VAC      OTHER      LEV  PAY    YRS  GHI   CONTRACT     TERMINATION
           BASIS   BASIS                                                     STEP   EXP  PART  SALARY          DATE

999088571  088571  RO6AN, JU6IE                                   (N)
                    1.000          3                                                        N      19951.20

999088583  088583  NU2N, LA2AWN                                   (N)
                    1.000          1                                          E             N      14503.31

999088592  088592  BR9SWELL, MA9CHELLE                            (C)      294200
           1.000                   4          3                           T5   L6    28    N      59025.00

999088593  088593  LU8WIG  SA8FORD                                (N)
                    1.000                     3          4                                  Y      24498.56

999088600  088600  RE9GAN  MA9Y                                   (N)
                    1.000          2                                                        Y      11924.12

999088602  088602  WI7SLOW, IS7AC                                 (N)
                    1.000          2                                                        Y      17683.20

999088607  088607  FO2TE, MA2WELL                                 (C)      291966
           1.000                                2                           T5   L4    17    N      54706.00
```


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Topic 2: Import Employee Leave Data

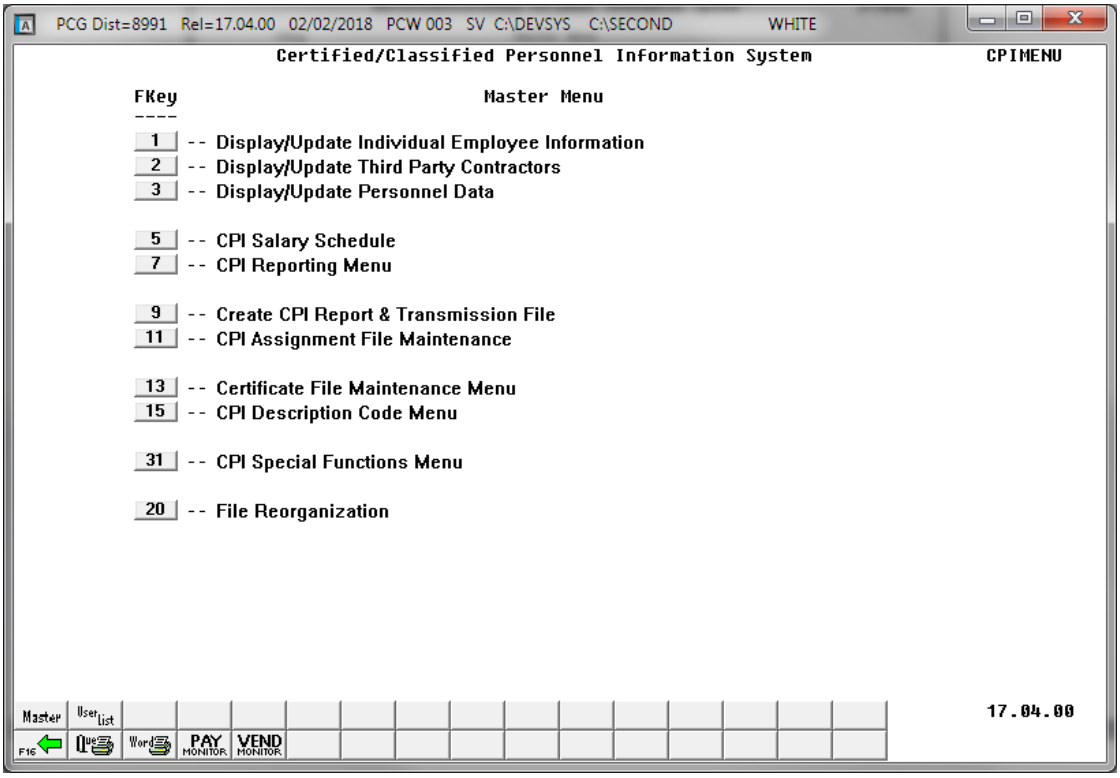
The *Import Employee Leave Data* procedure allows for the upload of current leave, year-to-date leave, and leave balances from a *.csv* file. The completion of this procedure allows these totals to be printed on the employees' pay stubs, if desired.

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

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

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

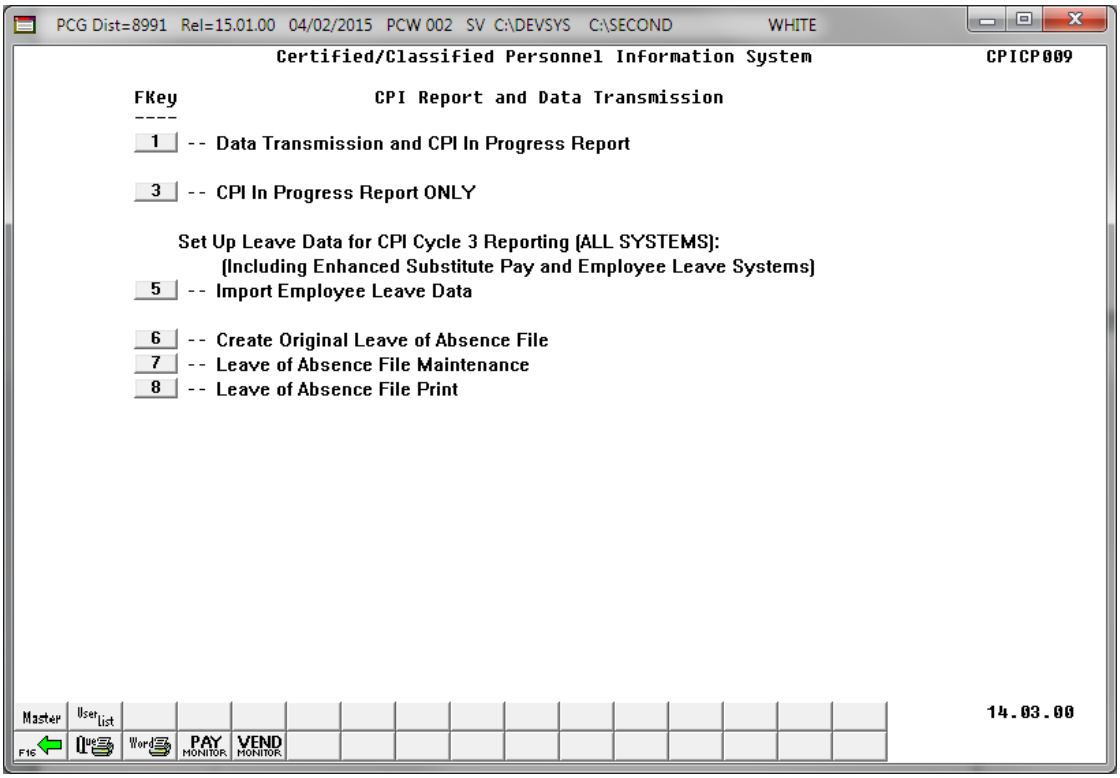
NOTE: If the *Enhanced Substitute Pay and Employee Leave System* is in use, leave updates using this procedure are NOT allowed.



All Rights Reserved.

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

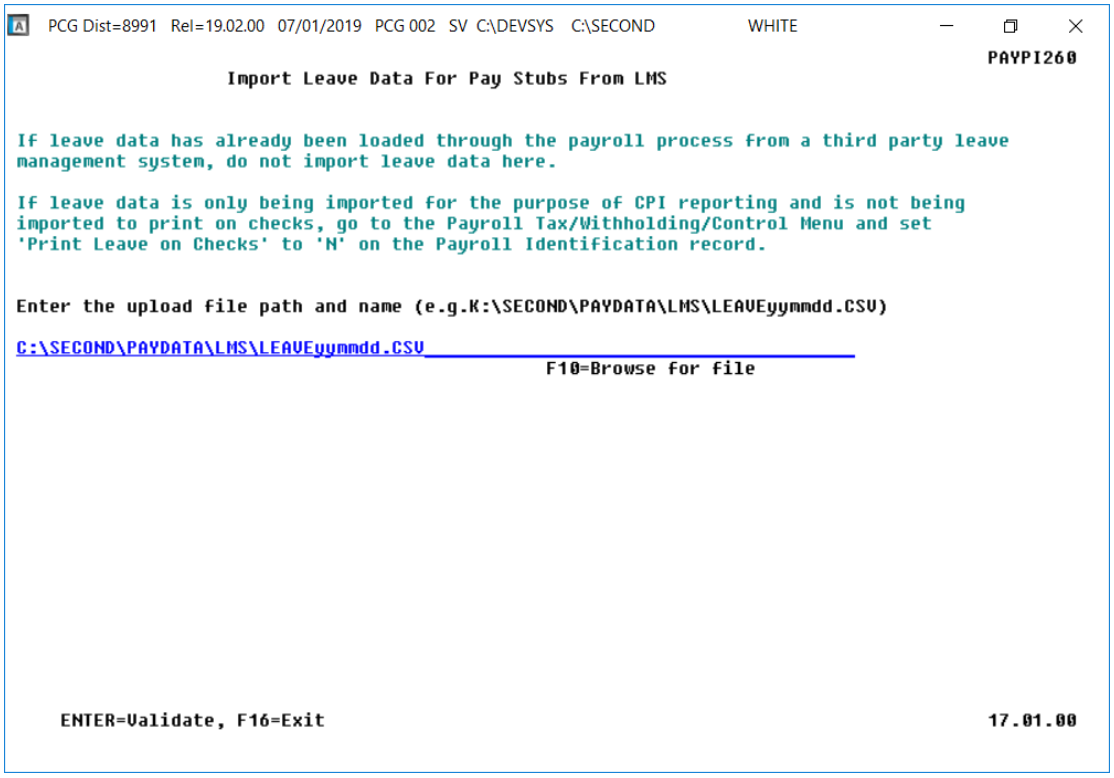
The following screen displays:



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

All Rights Reserved.

The following screen displays:



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

All Rights Reserved.

The following screen displays if there are no errors:

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

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

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

Enter the upload file path and name (e.g.K:\SECOND\PAYDATA\LMS\LEAVEyymmdd.CSV)

C:\EXPORT\LEGACYLEAVEIMPORT.CSV

*** IMPORT FILE SUCCESSFULLY LOADED ***

    Enter to Continue                                                          12.03.00
```

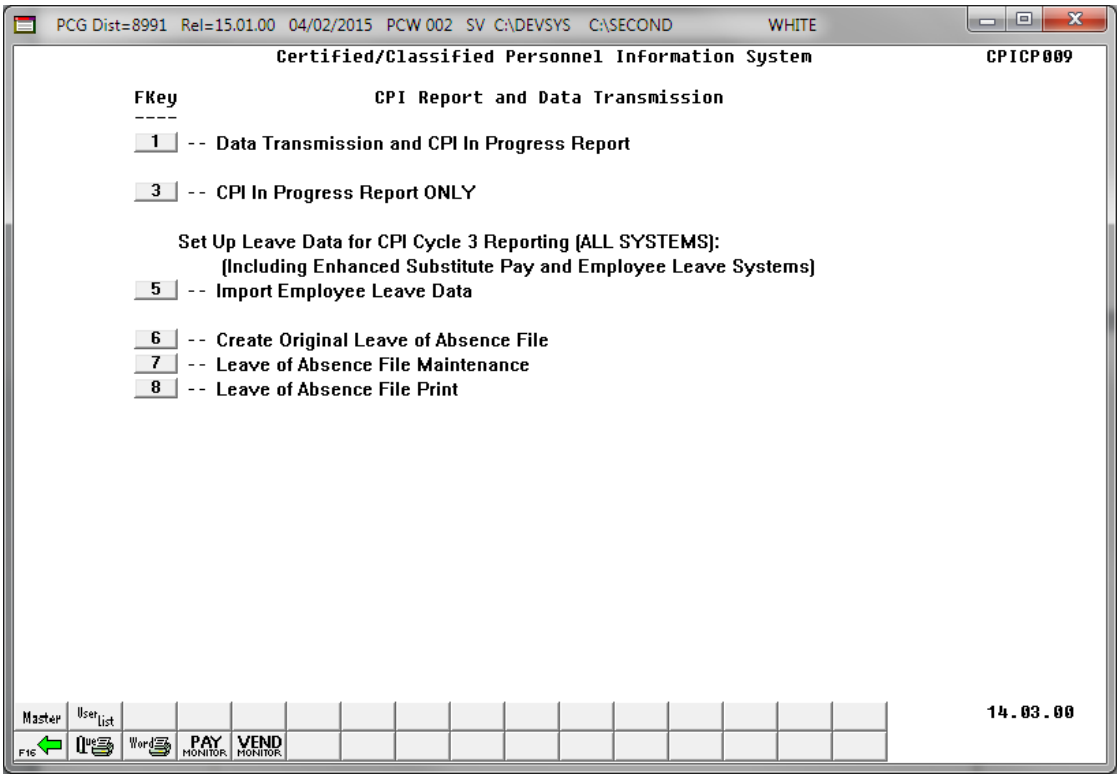
The following screen displays if there are errors:

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

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

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

Enter the upload file path and name (e.g.K:\SECOND\PAYDATA\LMS\LEAVEyymmdd.CSV)

C:\PCG\LVIMPORT.CSV

*** ERRORS FOUND - CSV File cannot be loaded ***

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

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


All Rights Reserved.

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

The following screen displays:



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

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2A. .csv File Layout

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

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

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

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2B. Leave Import Error Report – Example

```
Run date: 04/06/2015                LEAVE DATA IMPORT ERROR REPORT                Page:    1

Program: PAYPI260            Load File Name: C:\PCG\LEGACYLEAVEIMPORT.CSV

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


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Topic 3: Creating the Original Leave of Absence File

**** * * Attention * * ****

Repeating this Process deletes all prior entries.

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

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

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

- Payroll Sick Leave will be created in the *Leave of Absence File* with Absence Type **SLST**, Sick Leave – Standard.
- Payroll Personal Leave will be created with Absence Type **PER1**, Personal Leave.
- Payroll Vacation Leave will be created with Absence Type **VAC1**, Vacation Pay.
- Payroll Unpaid Leave will be created with Absence Type **SLWP**, Sick Leave w/o Pay.
- Payroll Other Leave will be created with Absence Type **ZOT1**, Other Approved Leave.
- Payroll Staff Development Leave will be created with Absence Type **STAF**, Staff Development.
- Payroll Sick Bank Taken Leave will be created with Absence Type **SLST**, Sick Leave – Standard.

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

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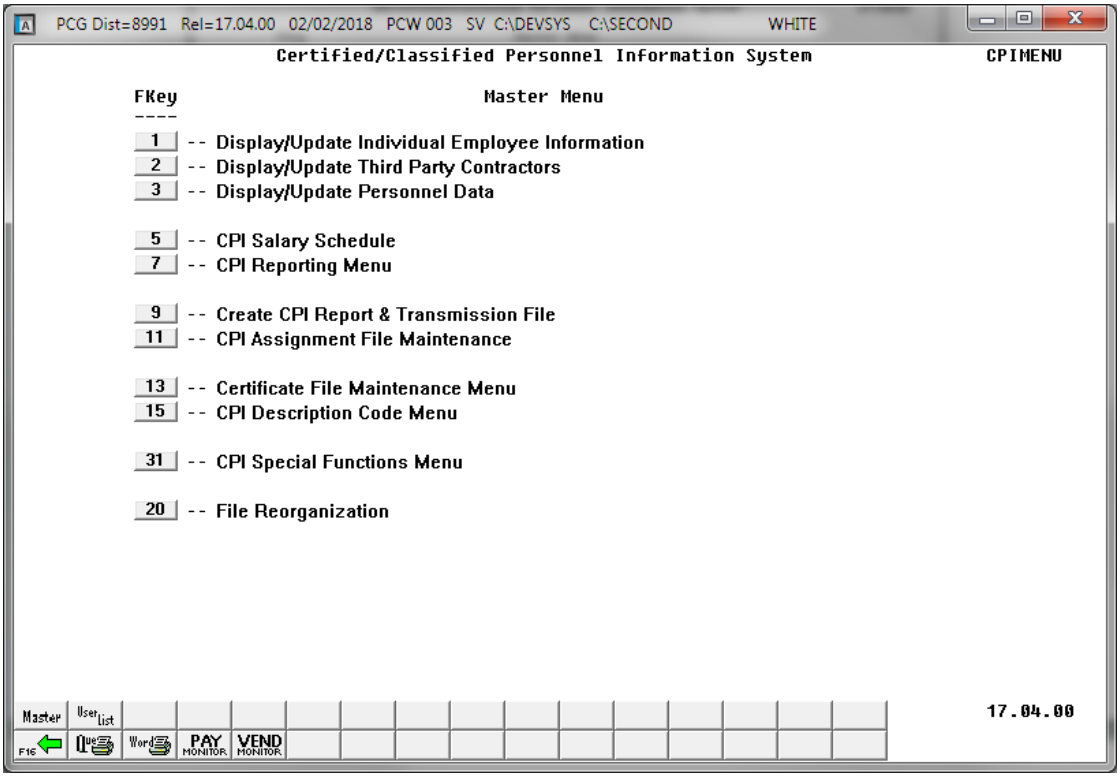
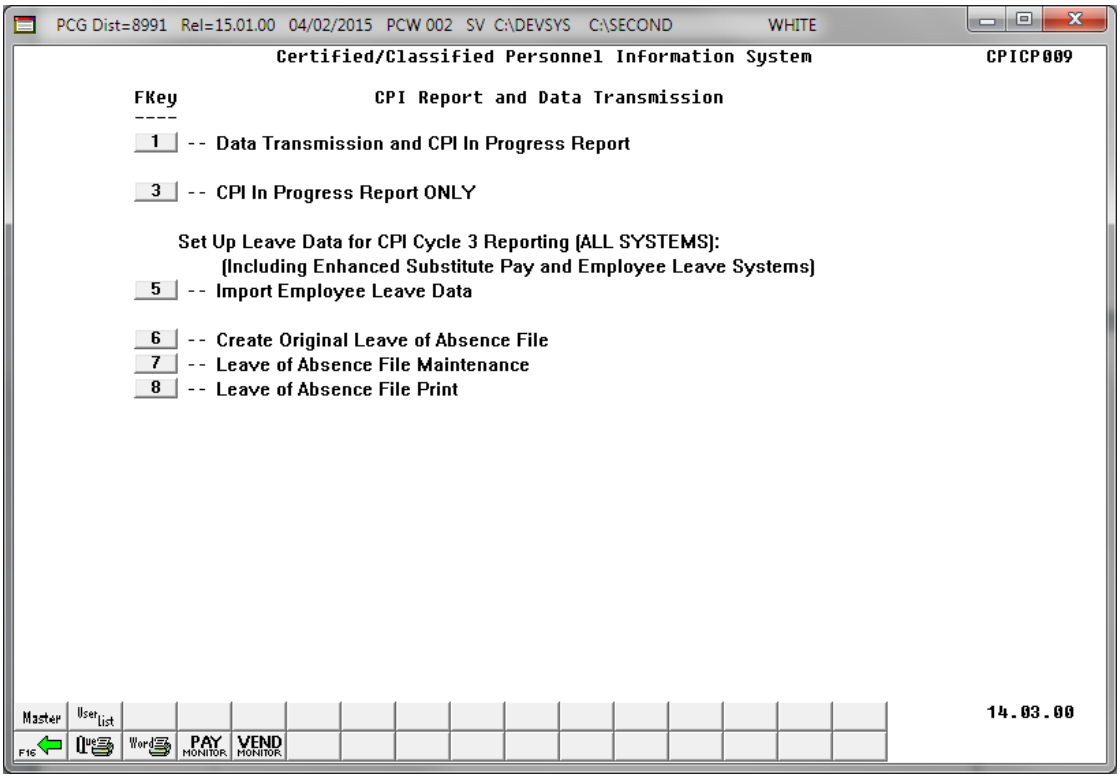


Step	Action
1	Select 9 (**F9 -** Create CPI Report and Transmission File).

All Rights Reserved.

The following screen displays:



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

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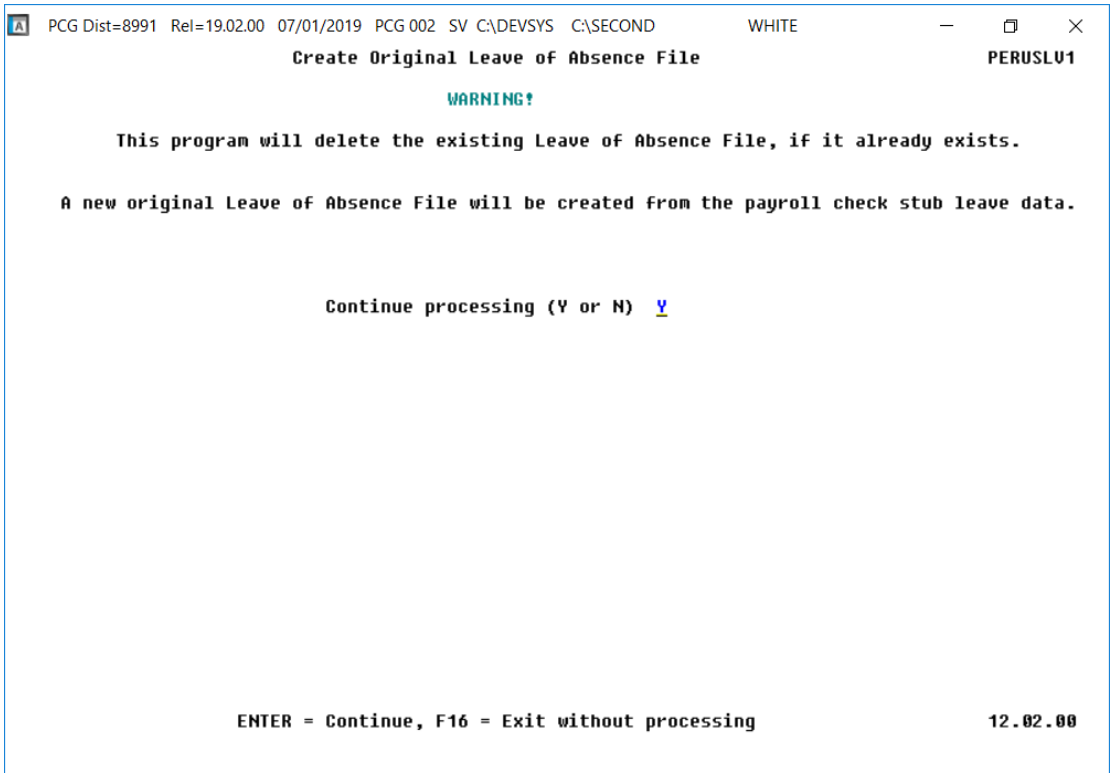
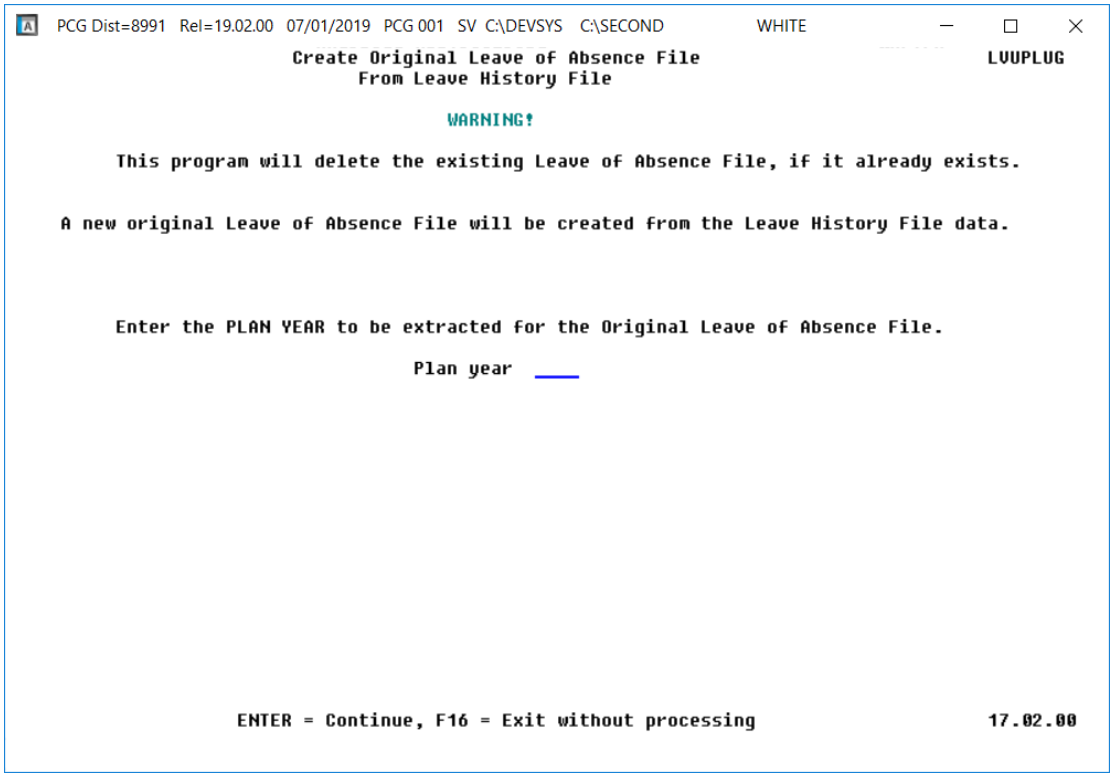
For systems using the *Legacy Leave System*, the following screen displays:



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

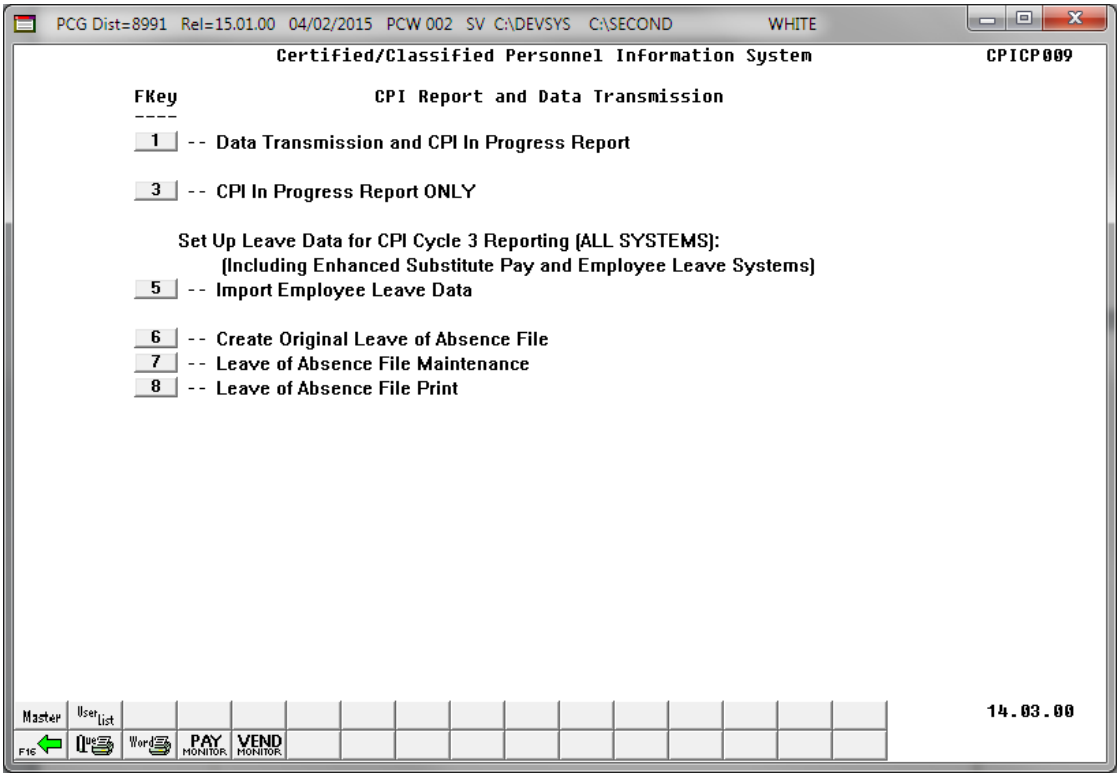


All Rights Reserved.

Step	Action
3	**For school districts and systems that are using the PCGenesis *Legacy Leave System***: Enter '**Y**' to continue processing. **For school districts and systems that are using the PCGenesis *Enhanced Substitute Pay and Employee Leave System***: Enter the **Plan Year**, in CCYY format, of the leave history data to extract for CPI processing. **For school districts and systems that are <u>not</u> using either PCGenesis Leave System**: Enter '**Y**' to continue processing.
4	Select **ENTER** to continue processing, or select **F16** to exit without processing. The *Create Original Leave of Absence File* process deletes <u>all</u> prior leave entries and always recreates the file *each and every time this procedure is run*. **For school districts and systems that are using the PCGenesis *Legacy Leave System* or the *Enhanced Substitute Pay and Employee Leave System***: A leave processing file will automatically be created and will include Sick Leave (SLST), Personal Leave (PER1), Vacation Leave (VAC1), Other Leave (ZOT1), Unpaid Leave (SLWP), and Staff Development (STAF) leave totals where appropriate. **For school districts and systems that are <u>not</u> using either PCGenesis Leave System**: If a PCGenesis Leave System is not being used, an empty *Leave of Absence File* is created. The leave of absence data must be created manually by keying the leave for each employee using the procedures provided in *Topic 4: Leave of Absence File Maintenance*. *The Personnel System – Legacy Leave Menu redisplays.*

All Rights Reserved.

The following screen displays:



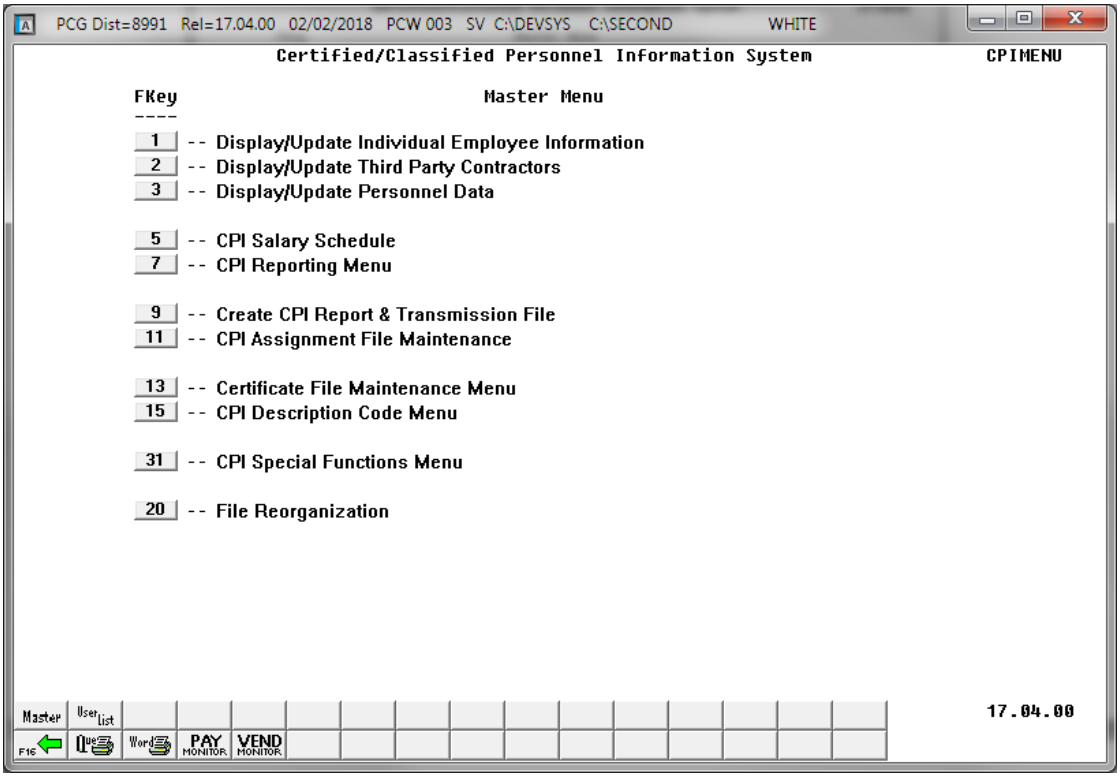
Step	Action
5	Select F16 (**F16 -** Exit) to return to the *Certified/Classified Personnel Information System Master Menu*, or select Master (**Master**) to return to the *Business Applications Master Menu.*

All Rights Reserved.

Topic 4: Leave of Absence File Maintenance

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

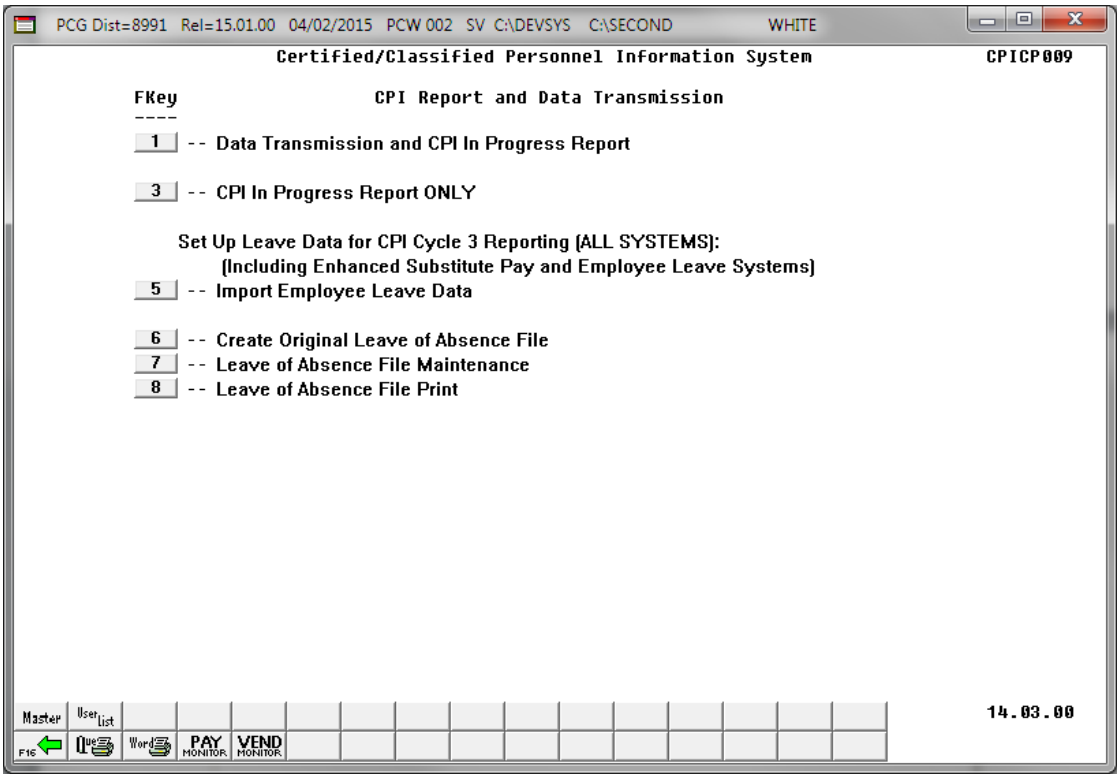
Procedure 4A. Add/Update Employee Leave Information



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

All Rights Reserved.

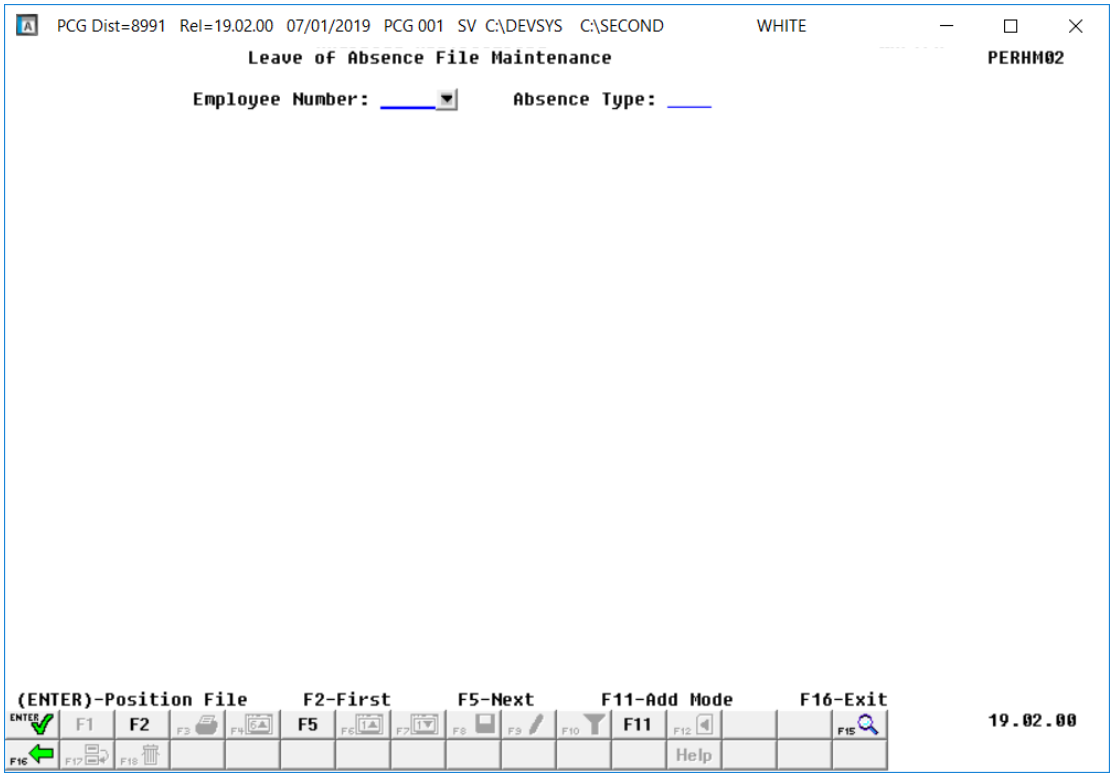
The following screen displays:



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

All Rights Reserved.

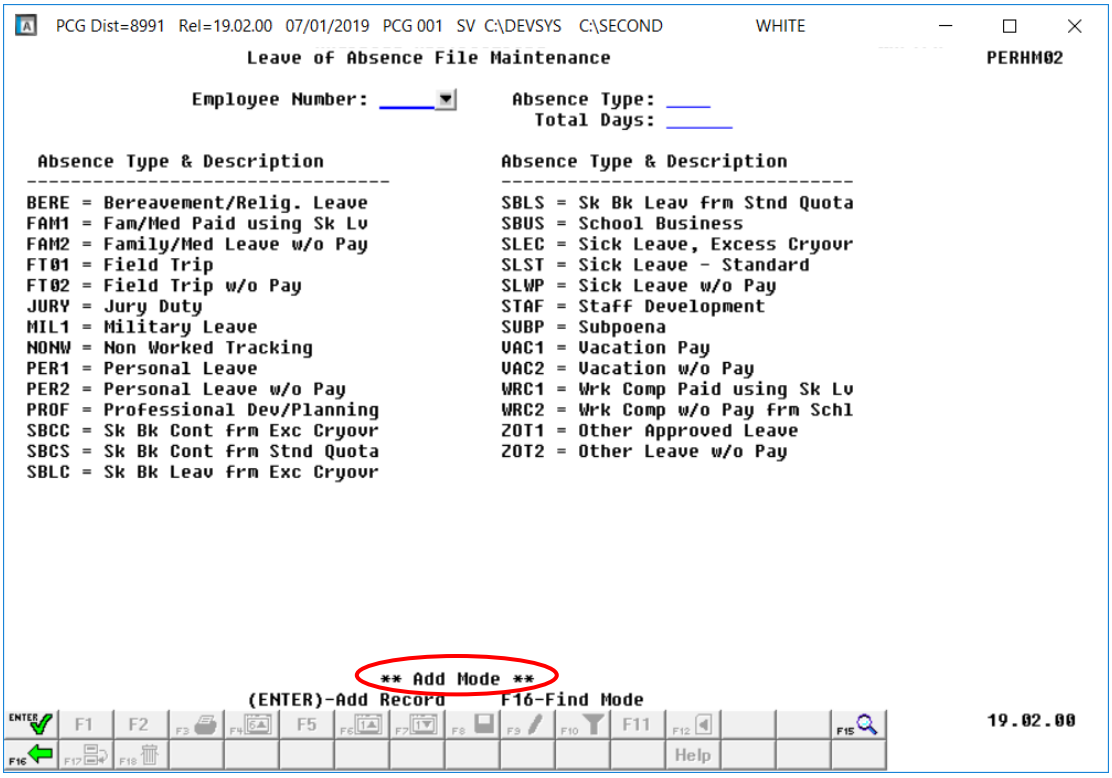
The following screen displays:



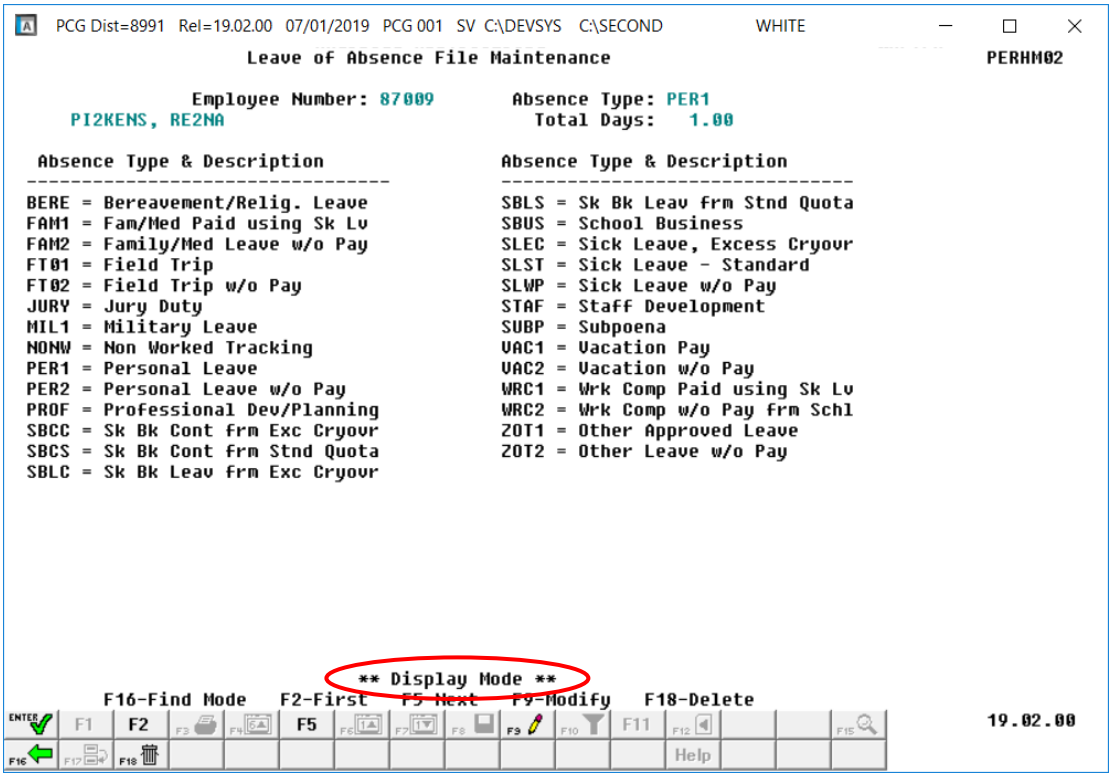
Step	Action
3	**To update an employee's leave record:** Enter the appropriate information in the **Employee Number** and **Absence Type** fields and select ENTER (**Enter -** Position File). **To add an employee's leave record:** Select F11 (**F11** - Add Mode). *Additional options will include* F2 *(**F2**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

All Rights Reserved.

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



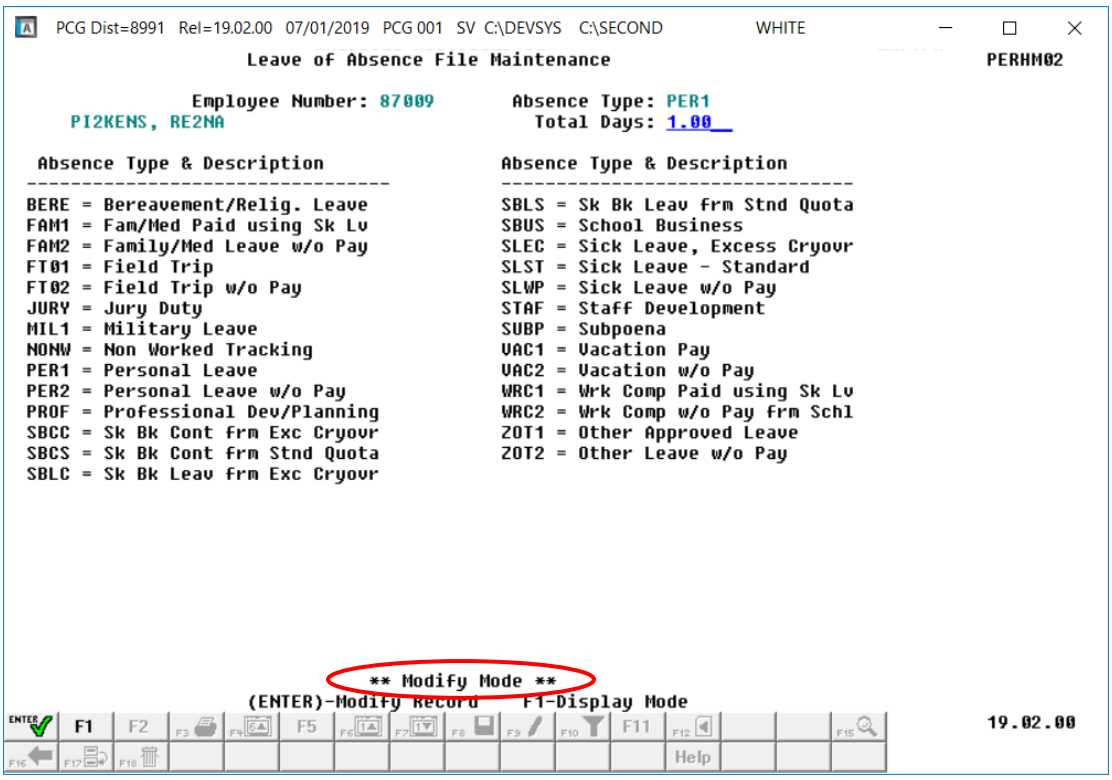
If **ENTER** (Position File) has been selected, the following screen displays:



All Rights Reserved.

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

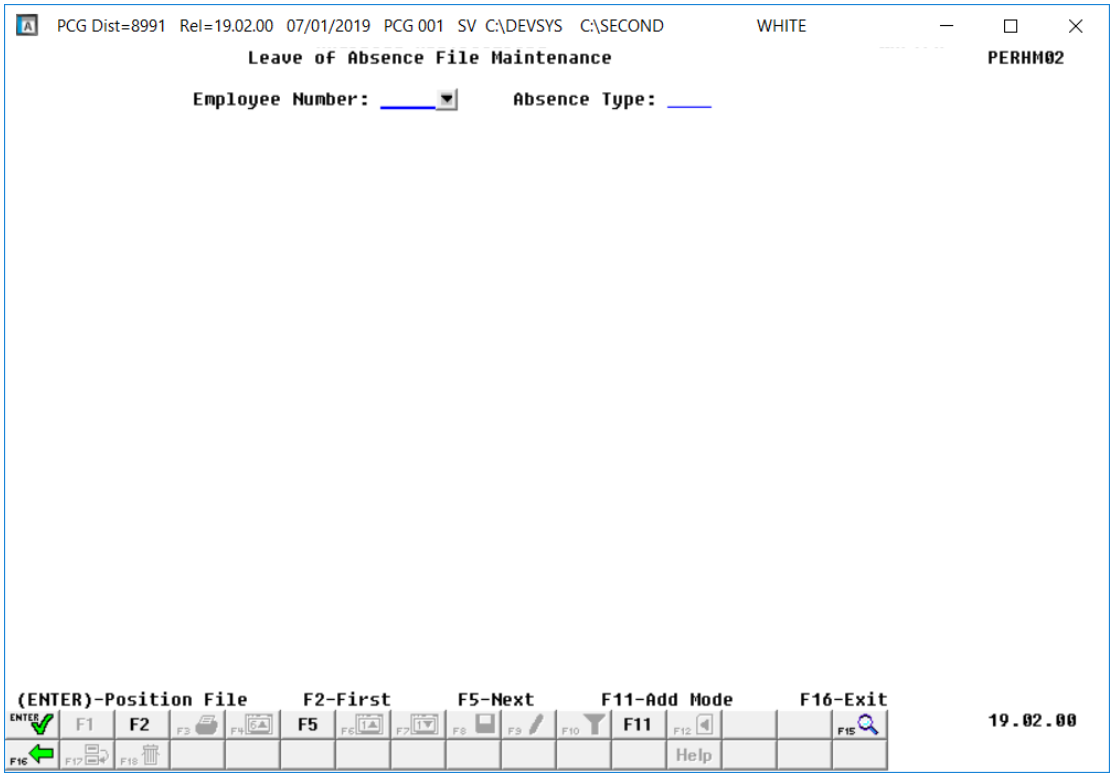
If **F9** (Modify) has been selected, the following screen displays:



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

All Rights Reserved.

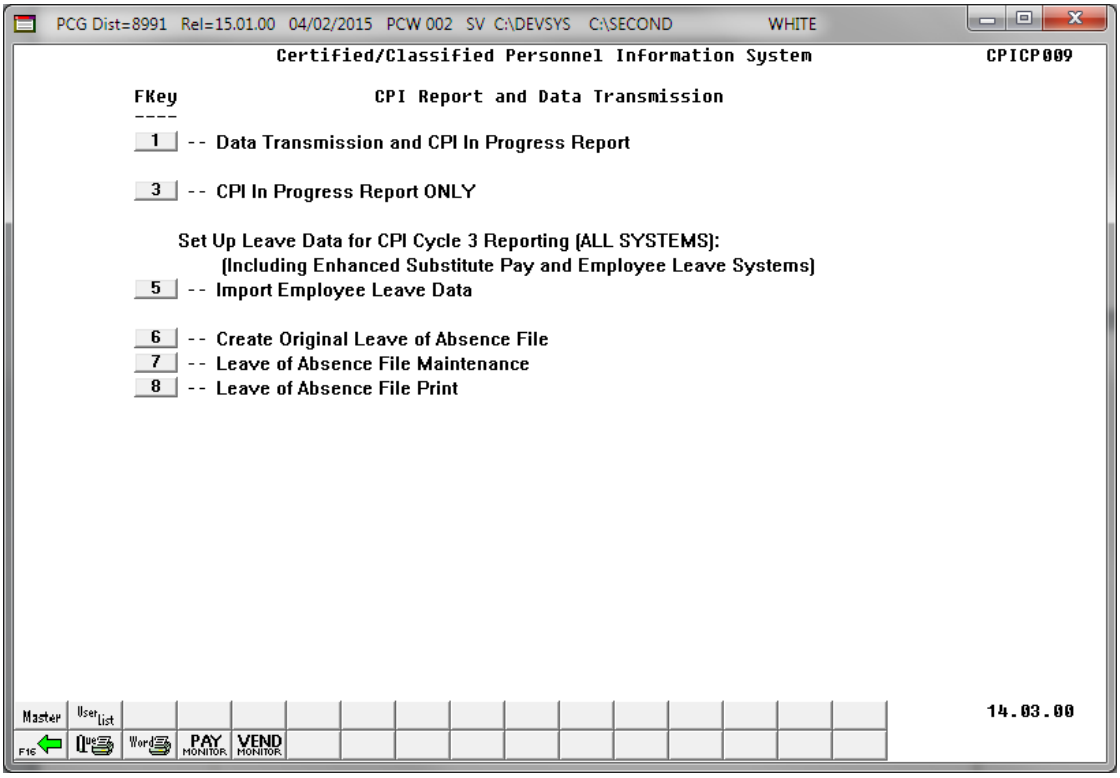
The following screen displays:



Step	Action
7	Select (**F16** - Exit) to return to the *CPI Report and Data Transmission Menu.*

All Rights Reserved.

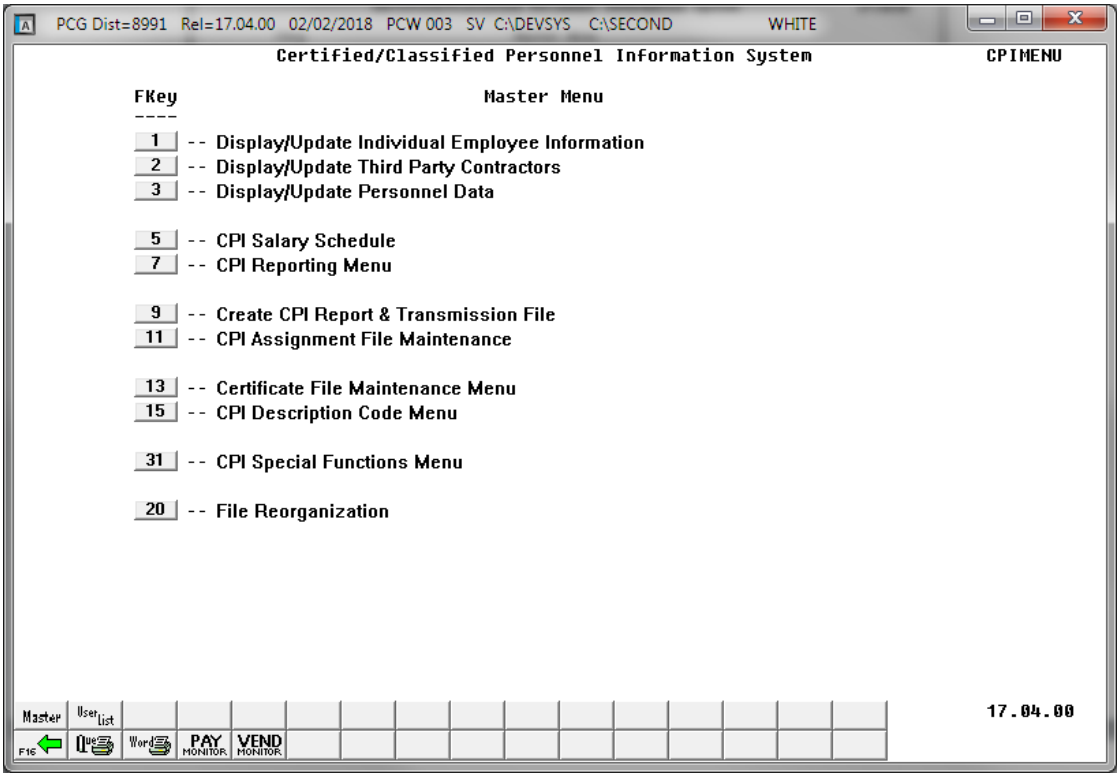
The following screen displays:



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

All Rights Reserved.

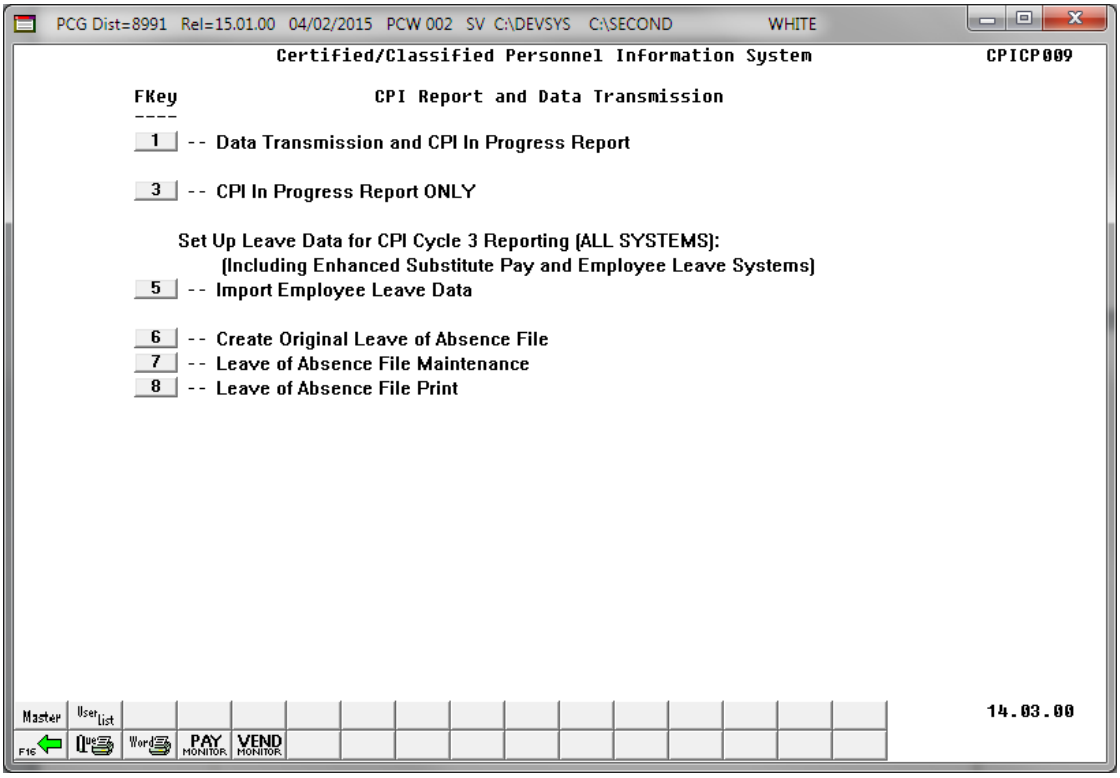
Procedure 4B. Delete Individual Employee Leave Information



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

All Rights Reserved.

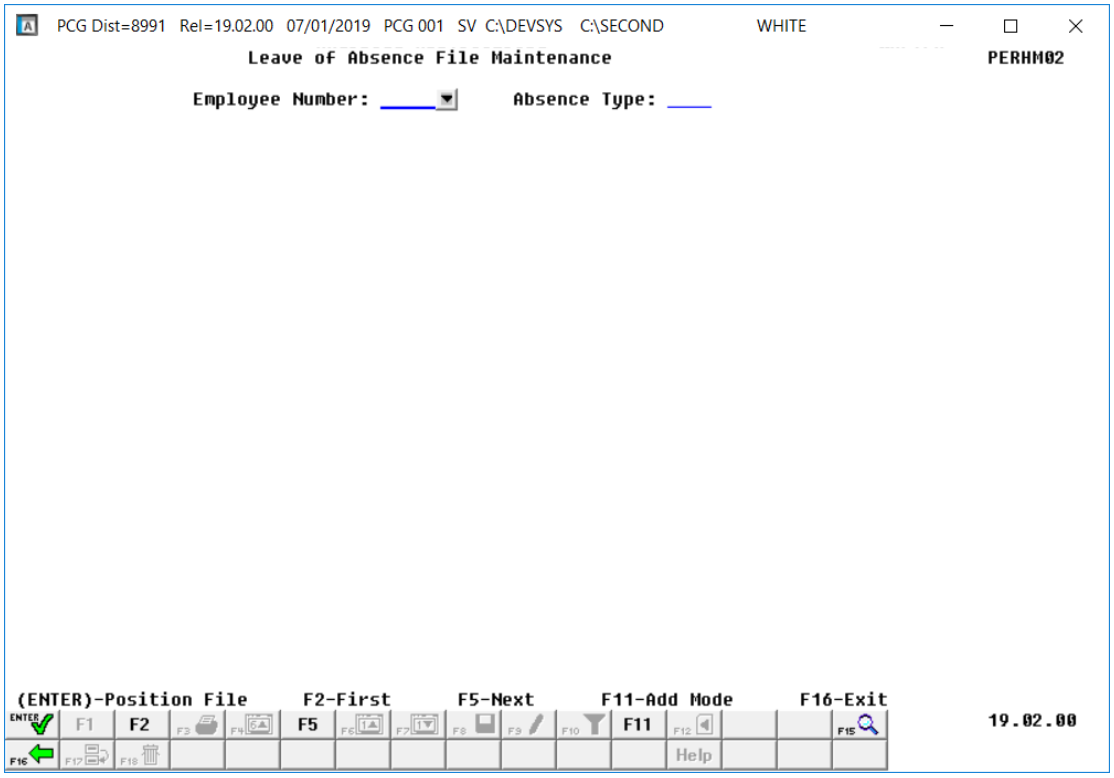
The following screen displays:



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

All Rights Reserved.

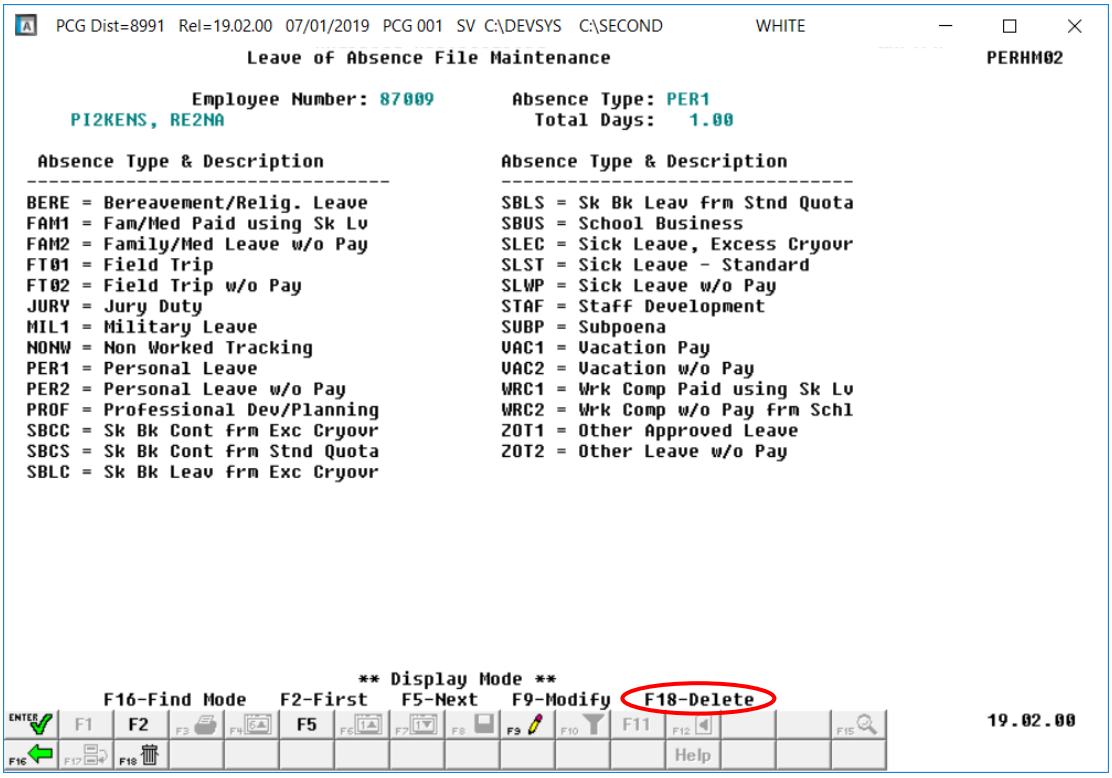
The following screen displays:



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

All Rights Reserved.

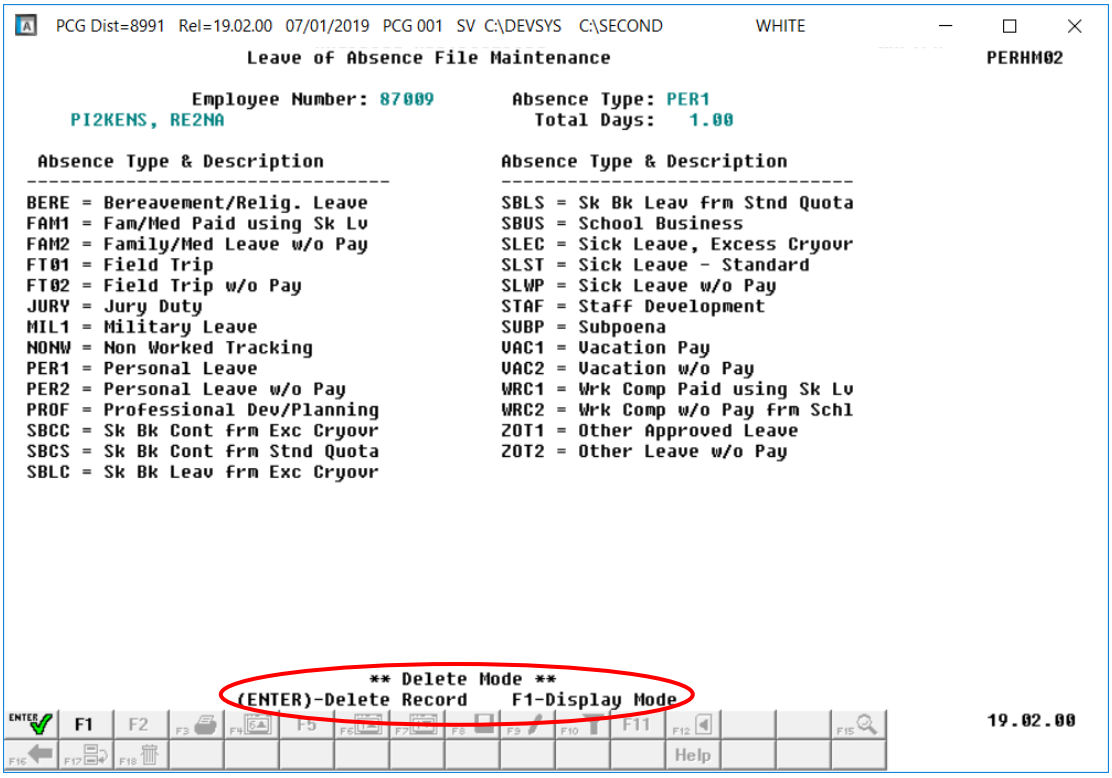
The following screen displays:



Step	Action
4	Select F18 (**F18** - Delete).

All Rights Reserved.

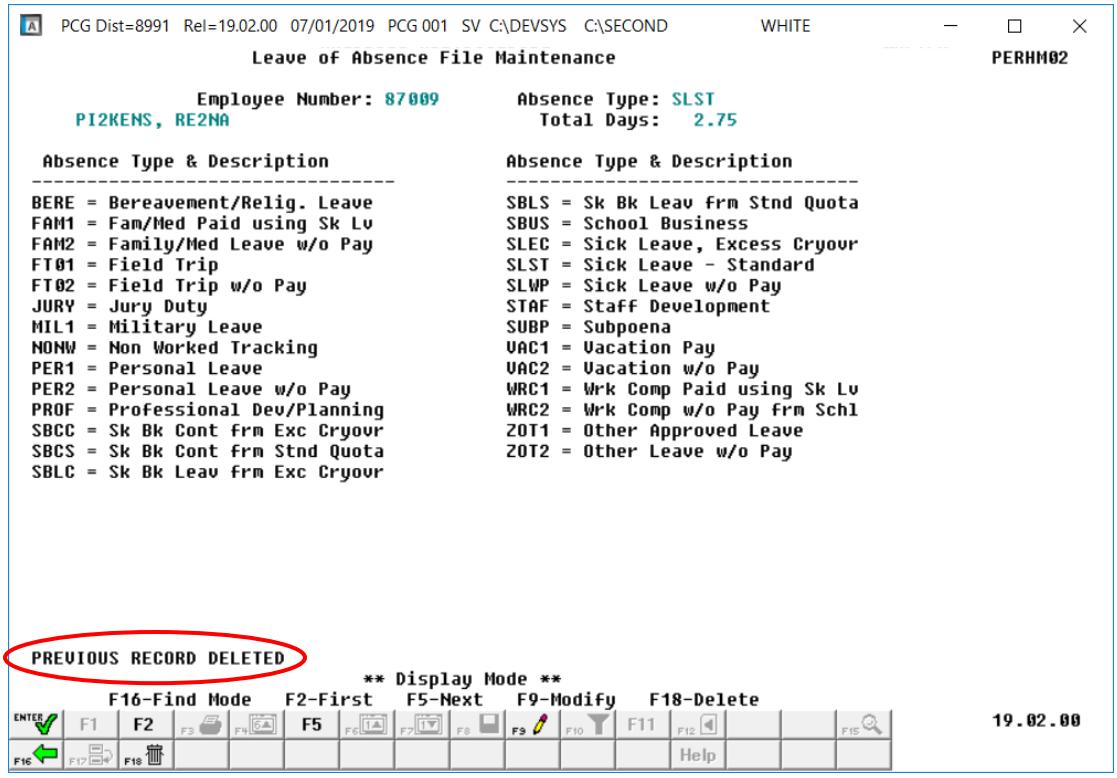
The following screen displays:



Step	Action
5	Select ENTER (**Enter** - Delete Record).

All Rights Reserved.

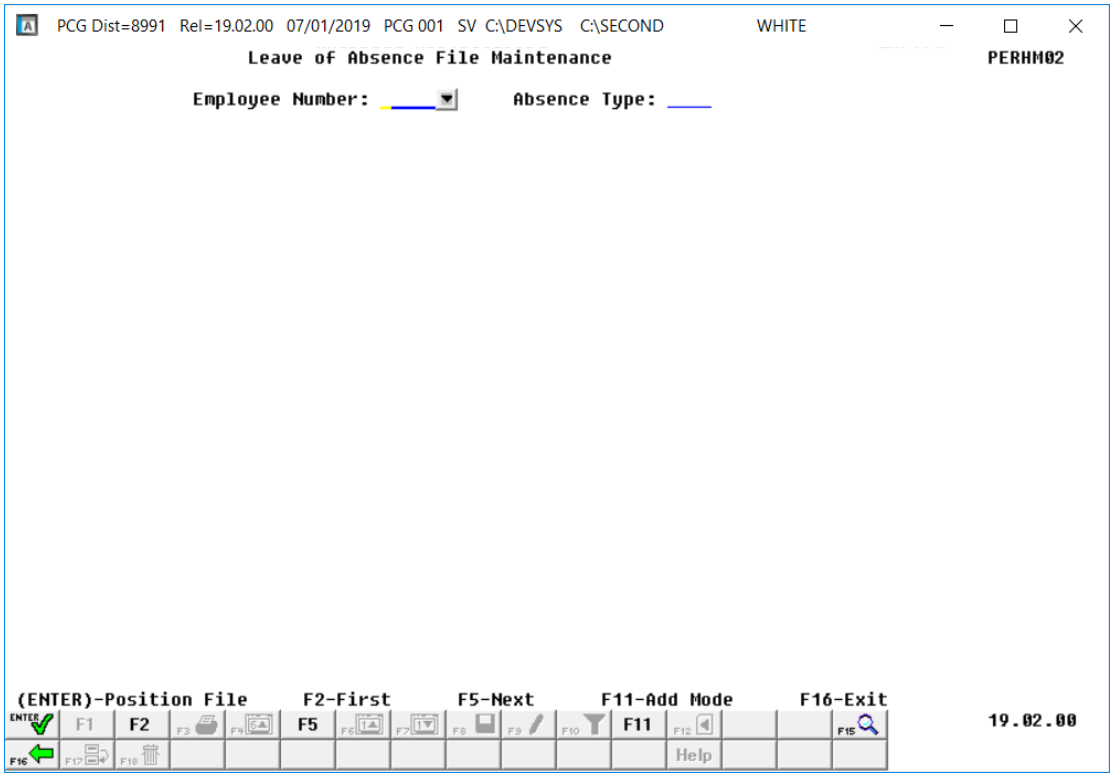
The following screen displays:



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

All Rights Reserved.

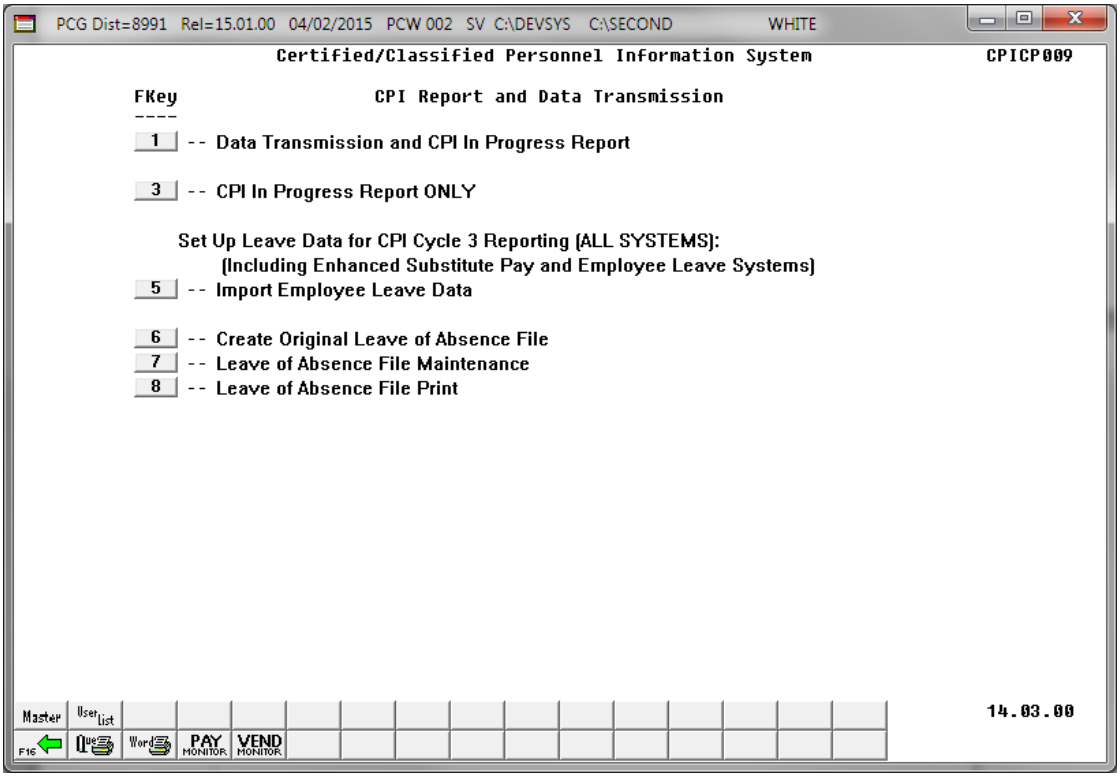
The following screen displays:



Step	Action
7	Select (**F16** - Exit) to return to the *CPI Report and Data Transmission Menu.*

All Rights Reserved.

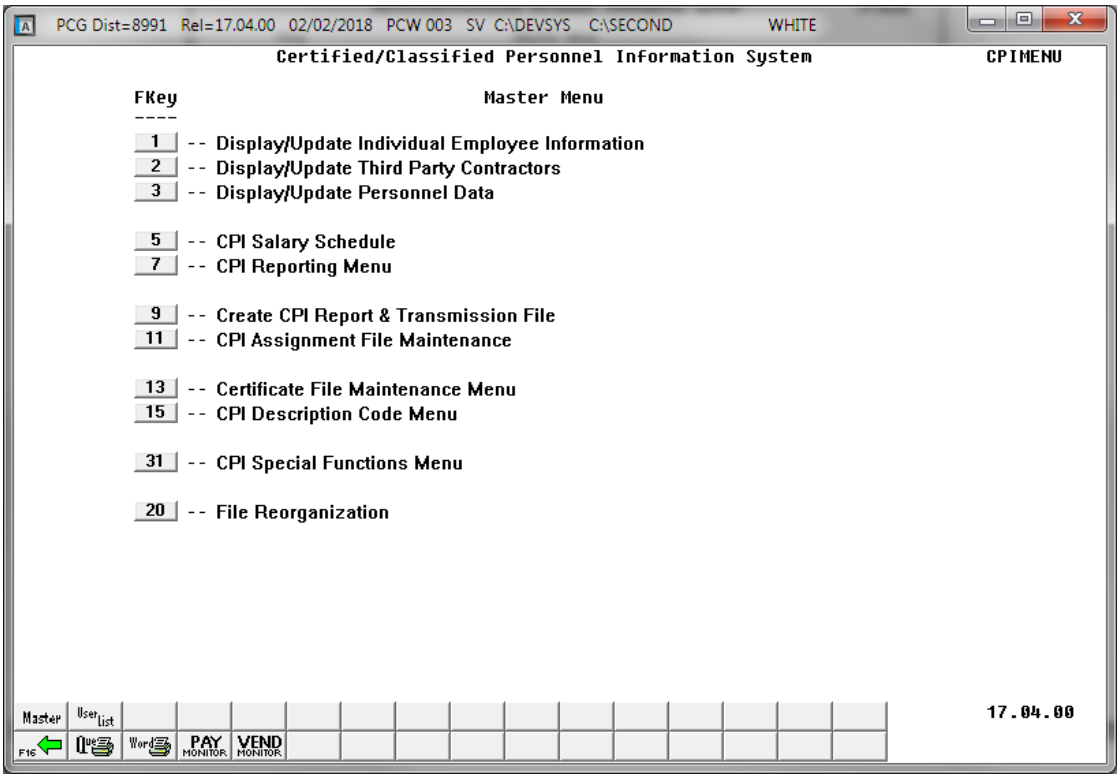
The following screen displays:



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

All Rights Reserved.

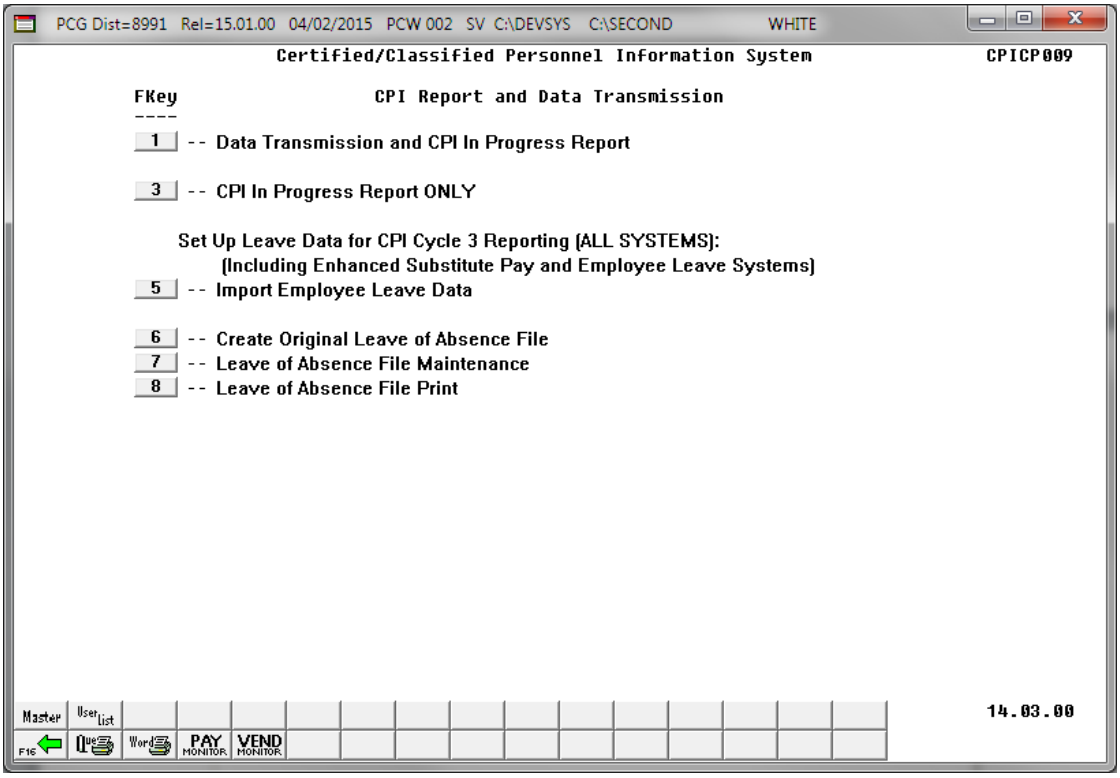
Topic 5: Printing the Leave of Absence Report



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

All Rights Reserved.

The following screen displays:



Step	Action
2	Select 8 (**F8 -** Leave of Absence File Print). *For school districts and systems that are using the PCGenesis Leave system: A listing of employees by Social Security Number (SSN), employee number, employee name, LUA code, absence type, absence days and the from date of the absence after the Original Leave of Absence File has been created (F6), will be generated.* *For school districts and systems that are not using the PCGenesis Leave system: Select F7 (Leave of Absence File Maintenance) to enter the employees' leave information into the Leave of Absence file and refer to Topic 4: for instructions.* *The CPI Report and Data Transmission Menu redisplays.*
3	Select F16 (**F16 -** Exit) to return to the *Certified/Classified Personnel Information System Master Menu*, or select Master (**Master**) to return to the *Business Applications Master Menu.*
4	**To print the report via the Uqueue Print Manager:** Select (**Uqueue**). **To print the report via Microsoft® Word:** Select Word (**MS WORD**). Follow the instructions provided in the *Technical System Operations Guide, User Interface Procedures, Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing* to create the macro necessary to use the feature where appropriate.

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5A. Leave of Absence Report – Example

==========Page Break==========

REPORT DATE 07/28/08 TIME: 14:34 LEAVE OF ABSENCE REPORT PAGE 1

SOC. SEC. NUMBER	EMPLOYEE NUMBER	DISTRICT NUMBER	ABSENCE TYPE	ABSENCE DAYS	FROM DATE (MM/DD/CCYY)	EMPLOYEE NAME
999088857	000088857	8991	SLST	000.75	00/00/0000	WORKSHARD, WILLAMINA
999088857	000088857	8991	VAC1	003.00	00/00/0000	WORKSHARD, WILLAMINA
999088901	000088901	8991	SLST	002.00	00/00/0000	NICEGUY, NORMAN
999088926	000088925	8991	SLST	001.00	00/00/0000	KRABBY, KARL
999088953	000088953	8991	SLST	002.00	00/00/0000	AY2ES, VI2ENTE
999088978	000088978	8991	SLST	001.00	00/00/0000	WISEGIRL, WILMA
999088994	000088994	8991	SLST	040.00	00/00/0000	ACCIDENTALLYFELL, AMMILIA X
999089021	000089021	8991	SLST	001.00	00/00/0000	PF7IFFER, CI7A
999089024	000089024	8991	SLST	001.00	00/00/0000	SPELLINGTEACHER, SPARTAN
999089101	000089101	8991	SLST	001.00	00/00/0000	VU7, MA7IELLE
999089102	000089102	8991	SLST	002.00	00/00/0000	CH6PA, LE6ARD

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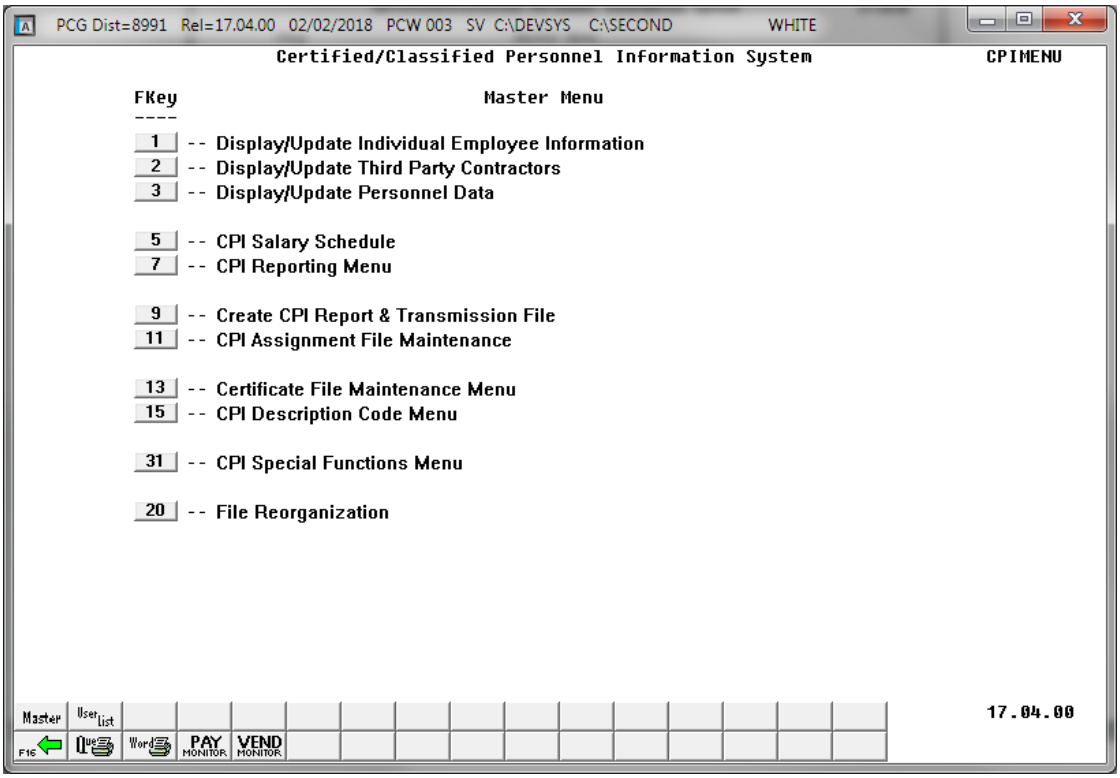
Topic 6: Deleting the Leave of Absence File

*** * * * * ATTENTION * * * * ***

This procedure deletes the Leave of Absence file's records. For leave records deleted in error, restore the information from a recent backup tape.

This procedure should only be performed once yearly, prior to the creation of the Original Leave Of Absence File for Certified/Classified Personnel Information (CPI) for Cycle 3.

Step	Action
1	Make sure a *Backup* media containing all of the *Leave of Absence* file's records exists.



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

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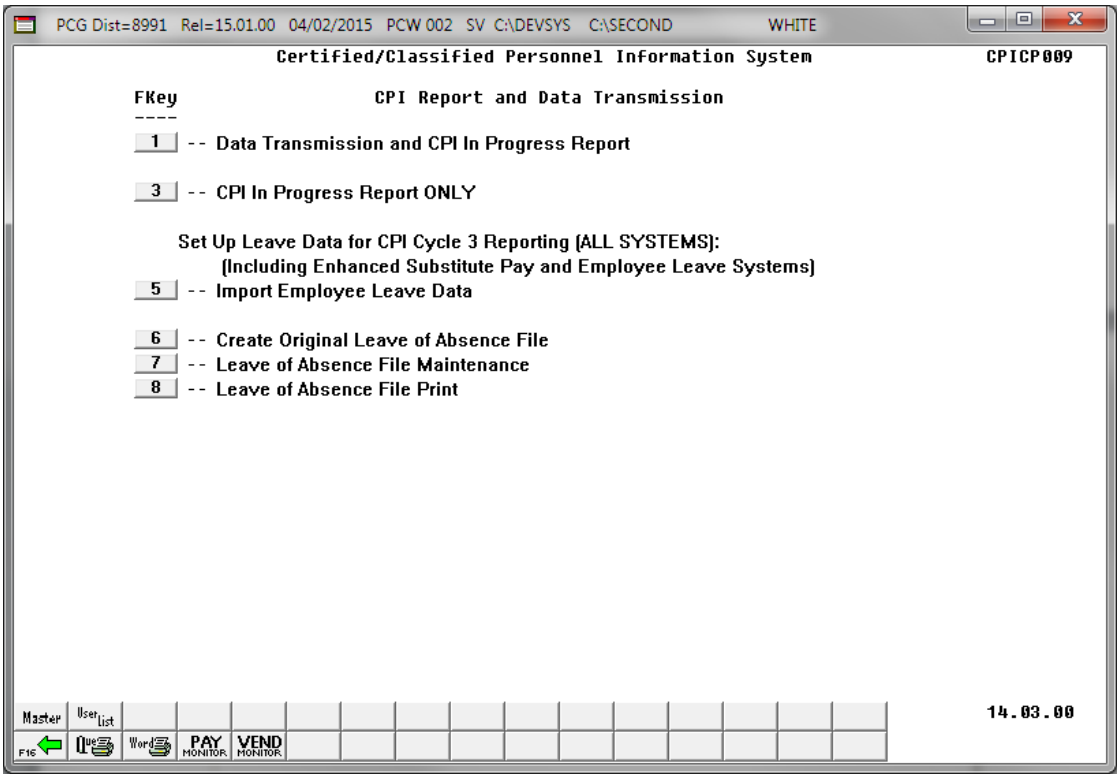
The following screen displays:



Step	Action
3	Select 9 (**F9 -** Delete Leave of Absence File).

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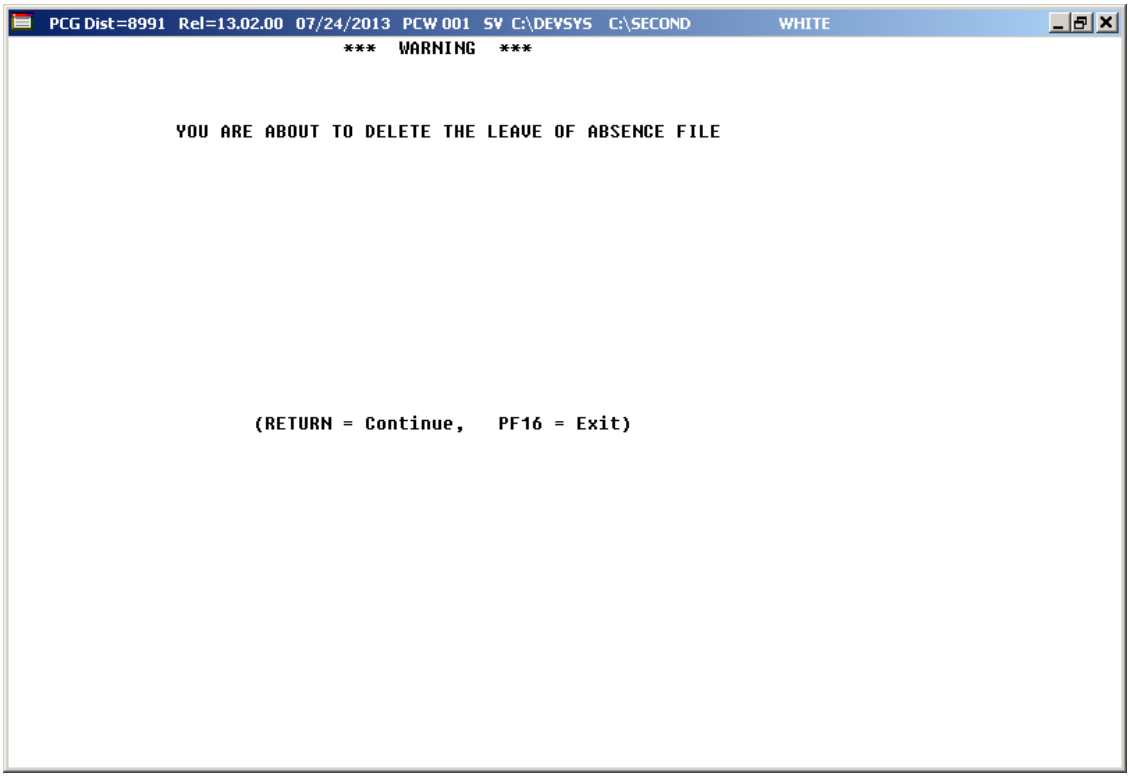
The following screen displays:



Step	Action
4	Review the * * * *WARNING* * * * screen's information, and select **Enter** (Continue).

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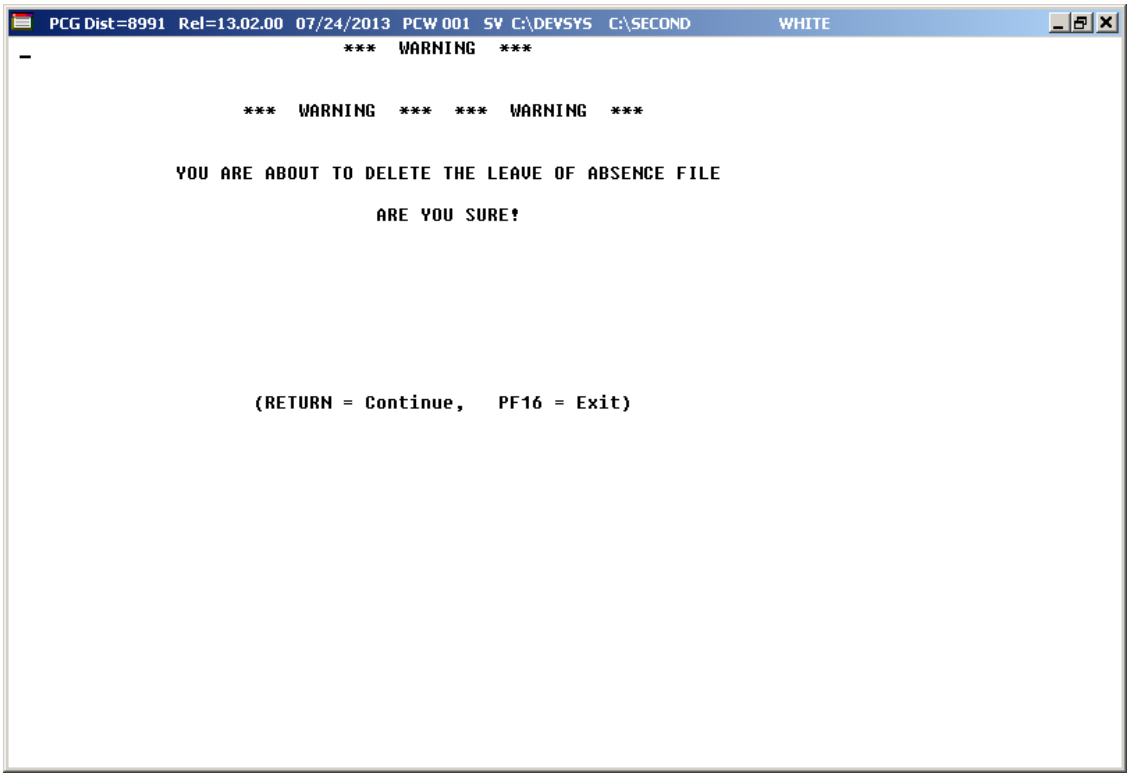
The following screen displays:



Step	Action
5	Select **Enter** (Continue).

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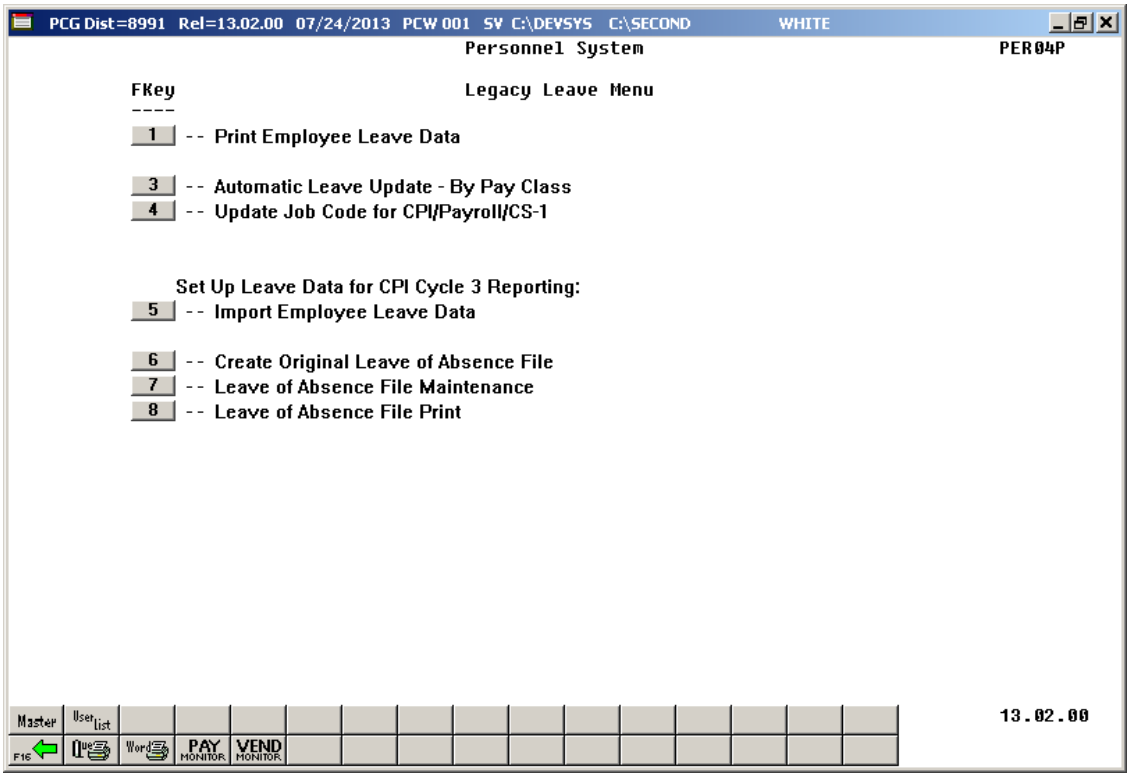
The following screen displays:



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

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Topic 7: Transmitting the CPI Transmission File to the Georgia Department of Education (GaDOE)

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

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