PCGenesis Certified/Classified Personnel Information (CPI) Cycle Three Checklist

√	Step	Action
Contact the Technology Management Customer Support Center for assistance as needed.		
	1	Perform a PCGenesis Data Backup.
	2	Update the CPI, Payroll, and CS-1 job codes. (F4, F31, F7) *Personnel System Operations Guide, Section A: Leave Processing*
	3	Enter, update, and upload the *CPI Salary Schedule* for the current year, where appropriate. (F4, F5) *CPI System Operations Guide, Section D: CPI Salary Schedule Processing*
	4	Make sure the termination dates exist on employees' payroll and personnel records. Do <u>NOT</u> change the *Include on CPI ?* flag to **N** (No) if it is presently **Y** (Yes). *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 3: Update/Display Personnel Information*
	5	Enter or verify the GaDOE termination date on the *CPI Process Control Inquiry* screen. (F4, F31, F9) *CPI System Operations Guide, Section I: Special Functions*
	6	Screen-print the *CPI Process Control Inquiry* screen. (F4, F31, F9) *CPI System Operations Guide, Section I: Special Functions*
	7	Perform the *CPI Rollover.* (F4, F31, F12) *CPI System Operations Guide, Section I: Special Functions*
	8	Screen-print the *CPI Process Control Inquiry* screen. (F4, F31, F9) *CPI System Operations Guide, Section I: Special Functions*

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√	Step	Action
	9	**PCGenesis Leave System Users Only**: Executing <u>all</u> of *Step 9* 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 in payroll. (F2, F2, F17) • 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*
	9.1	Create the *Original Leave of Absence* file. The *Original Leave of Absence File* will be created using leave data from payroll. (F4, F9, F6) *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*
	9.2	Skip *Step 10* and proceed to *Step 11*.

√	Step	Action
	10	**Import Leave Data for CPI Reporting Only**: Executing <u>all</u> of *Step 10* 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 in payroll. (F2, F2, F17) *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 4: Update/Display Payroll Information, Procedure E: Updating/Displaying Leave Data*
	10.1	**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. (F2, F13, F3, F9) *Payroll System Operations Guide, Section I: Special Functions, Topic 3: Tax Tables/Withholding/Control Information Processing*
	10.2	**Optional**: Perform the *Import Employee Leave Data* function on the *CPI Report and Data Transmission Menu* to import leave data into the PCGenesis system. (F4, F9, F5) *Certified/Classified Personnel Information (CPI) System Operations Guide, Section F: CPI In-Progress Report and Transmission File Processing, Topic 2: Import Employee Leave Data*
	10.3	Create the *Original Leave of Absence* file. (F4, F9, F6) • If leave data has been imported (*Step 10.2*) or keyed into the data entry <u>payroll</u> 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 <u>empty file</u>. *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*
	11	Maintain the *Leave of Absence* file as needed. (F4, F9, F7) *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*
	12	Print the *Leave of Absence* file. (F4, F9, F8) *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*

Contact the Technology Management Customer Support Center for assistance as needed.

√	Step	Action
	13	**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 <u>leave</u> reporting cycle and transmits the leave data from the *Original Leave of Absence* file to Data Collections. (F4, F9, F1) *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*
		13.1 **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*

Revision History

Date	Version	Description	Author
3/23/2022	1.2	22.01.00 – Clarify leave procedures.	D. Ochala
07/23/2018	1.1	18.02.00 – Clarify leave procedures.	D. Ochala
07/02/2018	1.0	18.02.00 – Update CPI Cycle 3 Checklist with Fkey sequences.	D. Ochala