PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

| 3/4/2024 | Section I: Special Functions |

[Topic 8E: Payroll New Hire Export and Import File Processing, V1.10]

Revision History

Date	Version	Description	Author
3/4/2024	1.10	24.01.00 – Change valid values for Georgia state tax withholding marital status.	D. Ochala
09/20/2023	1.9	23.03.00 – Add new **Prior Year Contract Months** field to imports.	D. Ochala
11/21/2022	1.8	22.04.00 – Add new **EEO-5 Job Code**, **GHI E-mail Preference**, **Personal E-mail Address**, **Local Salary**, **Other Salary**, and **Background Check Date** fields.	D. Ochala
01/10/2020	1.7	19.04.00 – Add the new 2020 W-4 fields.	D. Ochala
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04/03/2018	1.4	17.01.00 – Add documentation for importing **BOE Transfer** field.	D. Ochala
12/30/2016	1.3	16.04.00 – Add documentation for importing three new fields: the **Hours Per Day** field, the **'No Pension' Code** field, and the **Sick Bank** field.	D. Ochala
03/11/2015	1.2	14.04.00 – Add documentation for importing one file, multiple employees. Add **Substitute Rank** and **Hours Per Week** to the new hire imports.	D. Ochala
05/24/2011	1.1	11.02.00 – Add documentation for *Import New Hire File for Georgia Directory of New Hires*. Update menu screenshots.	D. Ochala
12/08/2011	1.0	10.04.00 – Create a new document for *Payroll New Hire Export and Import File Processing* instructions.	D. Ochala

Table of Contents

Overview

Import New Employees – Batch Mode: This feature provides the ability to mass load new employees into the PCGenesis system. New employees may be added in PCGenesis either manually, or via the file import procedure.

The *Import New Employees – Batch Mode* procedure is available from the *Payroll Export/Import Menu* and offers two methods for importing new employee data. The batch new hire import procedure can read a directory which contains multiple single-employee import files, and import all of the individual files at once. Or, the batch new hire import procedure can load multiple employees from one import file. When the user enters the *Import New Employees – Batch Mode* process, a screen is presented with the following two options:

The new hire import process facilitates gathering employee information from multiple departments and/or schools into Microsoft® Excel Spreadsheets/Workbooks which can then be loaded into the PCGenesis system either individually, or in batch mode. PCGenesis offers three methods for importing new employee data:

1) ***Add New Employee* on-line screen:** Users can use the *PCG_New_One_Employee.xlsx* template in the creation of new employees through the *Add New Employee* on-line screen. Users may select **F17** (Import new employee data) to import the data from a comma-delimited file. If the import is successful, the import data is displayed on the *New Employee* screen, and the payroll administrator is able to finish editing and adding the employee data. Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 2: Add a New Payroll Employee and Hire a New Third Party Contractor Employee* for instructions on using the *PCG_New_One_Employee.xlsx* template in the creation of new employees through the *Add New Employee* on-line screen.

2) **Batch Mode - Multiple Files, One Employee Per File:** A batch process is provided which loads multiple employee import files at the same time by selecting the option '***Multiple Files, One Employee Per File***'. This process reads a directory which contains multiple single-employee import files, and imports all of the individual files at once. Users use the *PCG_New_One_Employee.xlsx* template in the creation of new employees imported with this method. The *Import New Employees – Batch Mode* procedure is available from the *Special Functions Menu,* and the *Payroll Export/Import Menu.*

The user can run this process in trial mode or final mode. The process creates new employees for everything that passes edits, and bypasses any files which contain errors. Three reports are produced from the batch process: one report listing the valid employees, one report listing the employee files with errors, and a summary report which displays the results for each file. In this document, refer to *Procedure A: Import New Employees – Batch Mode (Multiple Files, One Employee Per File)* for the instructions on loading the new employee import files in batch mode.

3) **<u>Batch Mode - One File, Multiple Employees Per File</u>:** A batch process is provided which loads multiple employees from <u>one</u> file by selecting the option '***One File, Multiple Employees***'. Users use the *PCG_New_Multi_Employees.xlsx* template in the creation of new employees imported with this method. The *Import New Employees – Batch Mode* procedure is available from the *Special Functions Menu,* and the *Payroll Export/Import Menu.*

The user can run this process in trial mode or final mode. The process creates new employees when all data passes the edits, and no errors exist. In this document, refer to *Procedure B: Import New Employees – Batch Mode (One File, Multiple Employees)* for the instructions on loading the new employee import file in batch mode.

The *PCG_New_One_Employee.xlsx* and the *PCG_New_Multi_Employees.xlsx* templates are located at http://www.gadoe.org/Technology-Services/PCGenesis/Pages/Payroll-System-Operations-Guide.aspx. The templates are provided for use during the *Import* file procedures.

Export New Hire File for Georgia Directory of New Hires: PCGenesis supports **Electronic Reporting** of Georgia new hires. PCGenesis allows export of new hire information from payroll into a file that meets Georgia New Hire file layout specifications.

Federal and State law requires employers to report newly hired and re-hired employees in Georgia to the Georgia New Hire Reporting Program. In 1996, Congress enacted a law called the "Personal Responsibility and Work Opportunity Reconciliation Act," or PRWORA, as part of Welfare Reform. This legislation created the requirement for employers in all 50 states to report their new hires and re-hires to a state directory.

New hire reporting speeds up the child support income withholding order process, expedites collection of child support from parents who change jobs frequently, and quickly locates non-custodial parents to help in establishing paternity and child support orders. New hire reporting helps children receive the support they deserve. Employers serve as key partners in ensuring financial stability for many children and families and should take pride in their role.

Employers and/or labor organizations doing business in the State of Georgia must report the following employees:

- *New employees*: Employers must report all employees who reside or work in the State of Georgia to whom the employer anticipates paying earnings. Employees should be reported even if they work only one day and are terminated (prior to the employer fulfilling the new hire reporting requirement).

- *Re-hires or Re-called employees*: Employers must report re-hires, or employees who return to work after being laid off, furloughed, separated, granted a leave without pay, or terminated from employment. Employers must also report any employee who remains on the payroll during a break in service or gap in pay, and then returns to work. This includes teachers, substitutes, seasonal workers, etc.

- *Temporary employees*: Temporary agencies are responsible for reporting any employee who they hire to report for an assignment. Employees need to be reported only once; they do not need to be re-reported each time they report to a new client. They do need to be reported as a re-hire if the worker has a break in service or gap in wages from your company.

When to report? Georgia Statute 19-11-9.2 requires all employers to submit their new hire reports within 10 days after the employee is hired or re-hired or returns to work. Employers who submit reports magnetically or electronically shall submit the reports in two monthly transmissions not more than sixteen days apart.

Procedure A: Import New Employees – Batch Mode (Multiple Files, One Employee Per File)

In this procedure, the user specifies a directory that contains the new employee import file or files. The import files must be in comma-delimited (.csv) format. The process scans the import directory and produces three reports.

- *Employee New Hire Import Report*: A summary report of the individual file(s) processed, listing whether the files passed or failed the edits.
- *Employee New Hire Import Error Report*: An error report that lists the file errors.
- *New Employee Import - Valid Employees*: An employee detail listing that lists the validated employee data.

The Import New Employees process can be run in two different modes: **Trial Mode** validates the employee data but does <u>not</u> add any employees to the PCGenesis system. **Final Mode** validates the employees, and if valid, <u>saves</u> the new employee data to the PCGenesis system. Trial Mode should always be run at least one time before running the import process in Final Mode. Final Mode should only be run after correcting all errors that appear on the *Employee New Hire Import Error Report*, and verifying the accuracy of the employee data on the *New Employee Import - Valid Employees* report.

When the import process is run in FINAL mode, **only the files that pass the edits are uploaded** as new employees, and the files that fail the edits are not processed.

The following rules apply to the batch load process:

- Only active (status = **A**) or inactive (status = **I**) employees may be loaded with the batch load process. Terminated employees cannot be loaded with this utility.
- After the batch load process is run in Final Mode, the *New Employee Import - Valid Employees* report should be reviewed for additional warning messages that may have occurred during the final processing. For example, if the employee data contains a **Social Security Number** that is assigned to an employee already in the system, the following warning message is displayed: *WARNING - SSN already exists on PAYROLL file.*

Appendix A: Formatting the PCG_New_One_Employee.csv File (Multiple Files, One Employee Per File) provides a detailed description of the *.csv* file and its contents.

A1. PCGenesis and Microsoft® Excel File Verification

Step	Action
1	Create the comma-delimited (.csv) import file or files.
	Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 2: Add a New Payroll Employee and Hire a New Third Party Contractor Employee, Procedure D: New Employee Import Process* for instructions on using the *PCG_New_One_Employee.xlsx* template and creating the comma-delimited (.csv) import files.
2	Multiple comma-delimited (.csv) import files should be located in **one** directory path. For example, when preparing to upload a group of new employees into PCGenesis, all comma-delimited (.csv) import files should be located in one directory, such as **C:\PCGNewEmployee**.

The following screen illustrates multiple comma-delimited (.csv) import files located in **one** directory path:
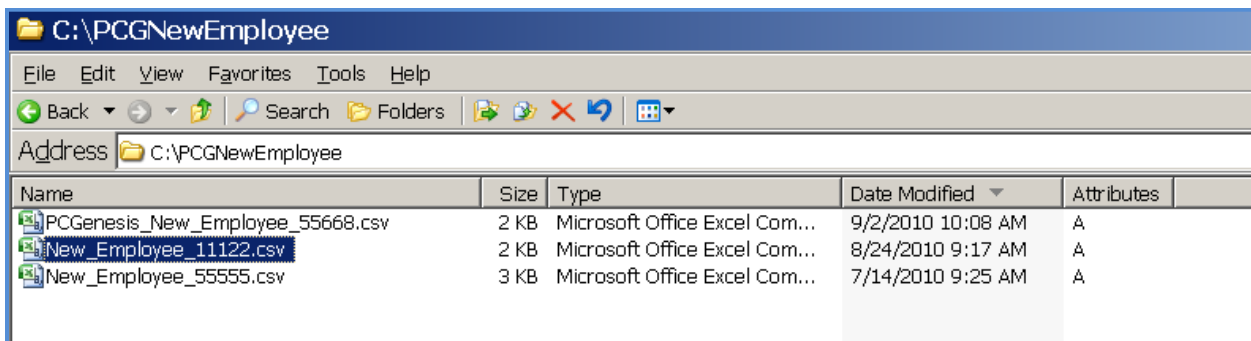
A2. Perform a PCGenesis Disk to Disk Backup

Step	Action
1	**From the PCGenesis server, perform a Disk-to-Disk backup:**
	• Verify all users all logged out of PCGenesis.
	• Perform a PCGenesis full backup to CD or DVD or USB.
2	Label the backup *"MM/DD/CCYY – Backup Before New Employee Import"*.

A3. Importing the Microsoft Excel® .csv File into PCGenesis
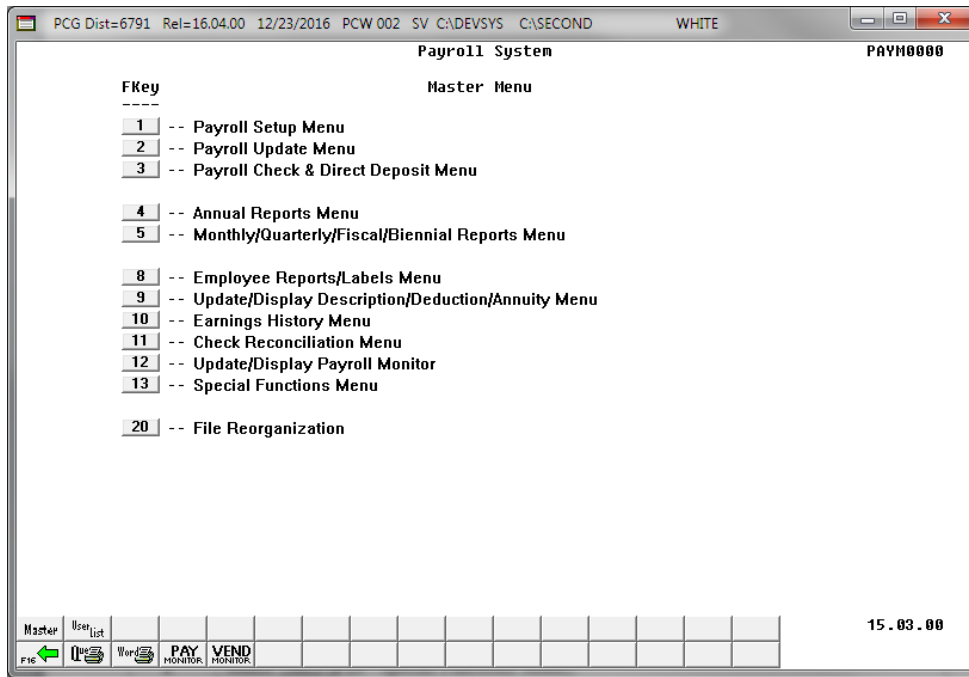
Step	Action
1	Select ⬚13 (**F13 -** Special Functions Menu).
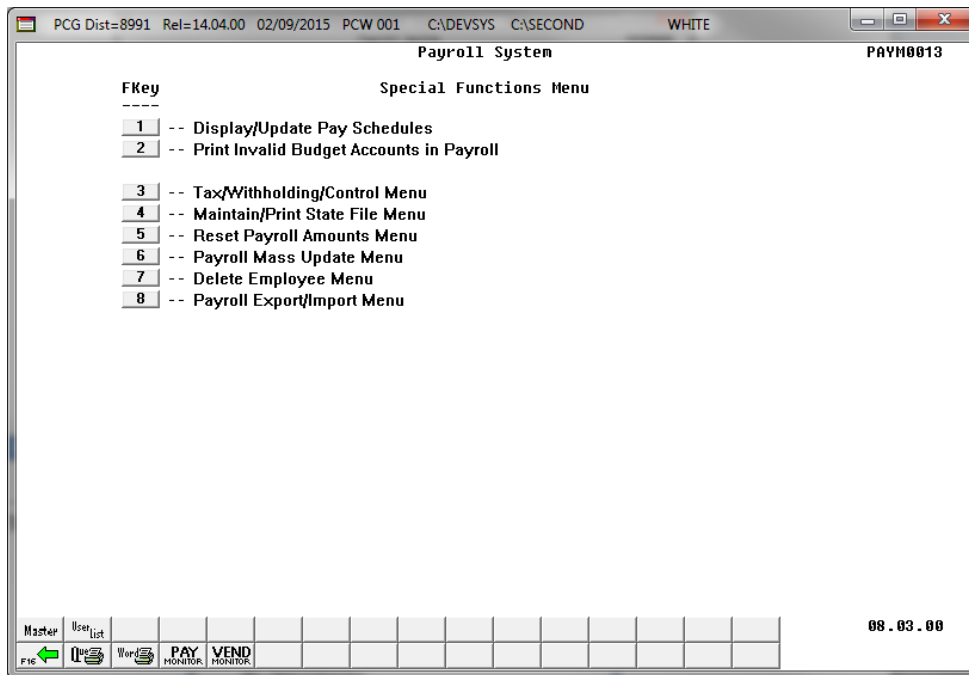
The following screen displays:

Step	Action
2	Select ⬚**8** (**F8** - Payroll Export/Import Menu).

The following screen displays:
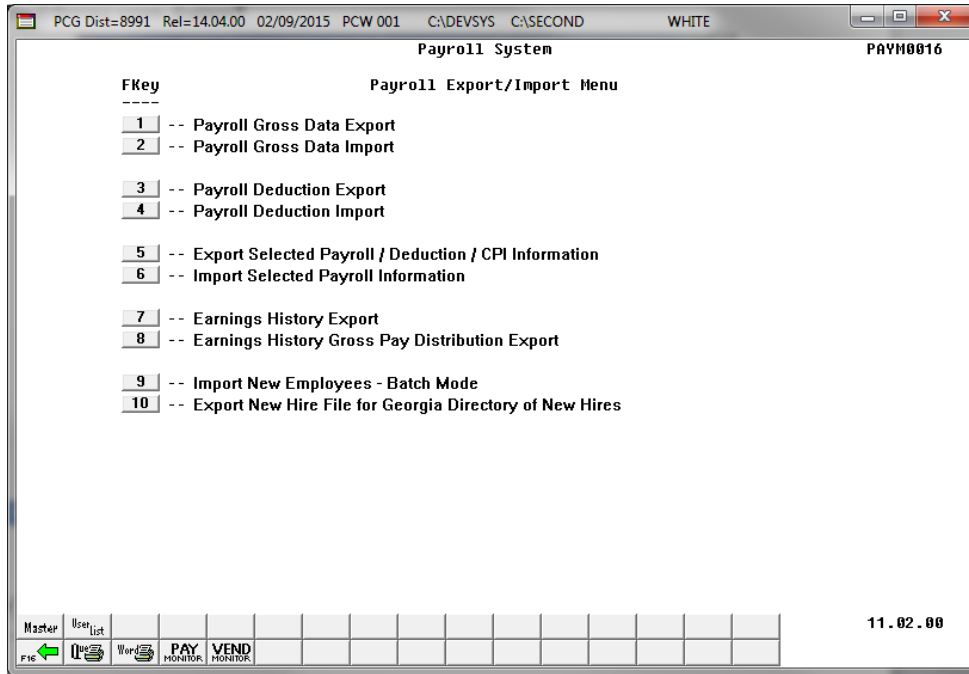
Step	Action
3	Select ⬚**9** (**F9** – Import New Employees – Batch Mode).

The following screen displays:

```
┌──────────────────────────────────────────────────────────────────────────────┐
│ ▣  PCG Dist=8991  Rel=14.04.00  02/09/2015  PCW 001   C:\DEVSYS  C:\SECOND      WHITE    ─ ▢ ✕ │
│                                                                       PAYPP150  │
│                               Import New Employees                              │
│                                                                                 │
│         Import File Type?       ⊙ Muliple Files, One Employee Per File          │
│                                 ○ One File, Multiple Employees                  │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│                                                                                 │
│ _Enter To Continue                               F16 to Exit                    │
│ ENTER                                                                14.03.00    │
│  ✓                                             F10 ▼                             │
│ F16                                                                             │
│  ⬅                                                                              │
└──────────────────────────────────────────────────────────────────────────────┘
```
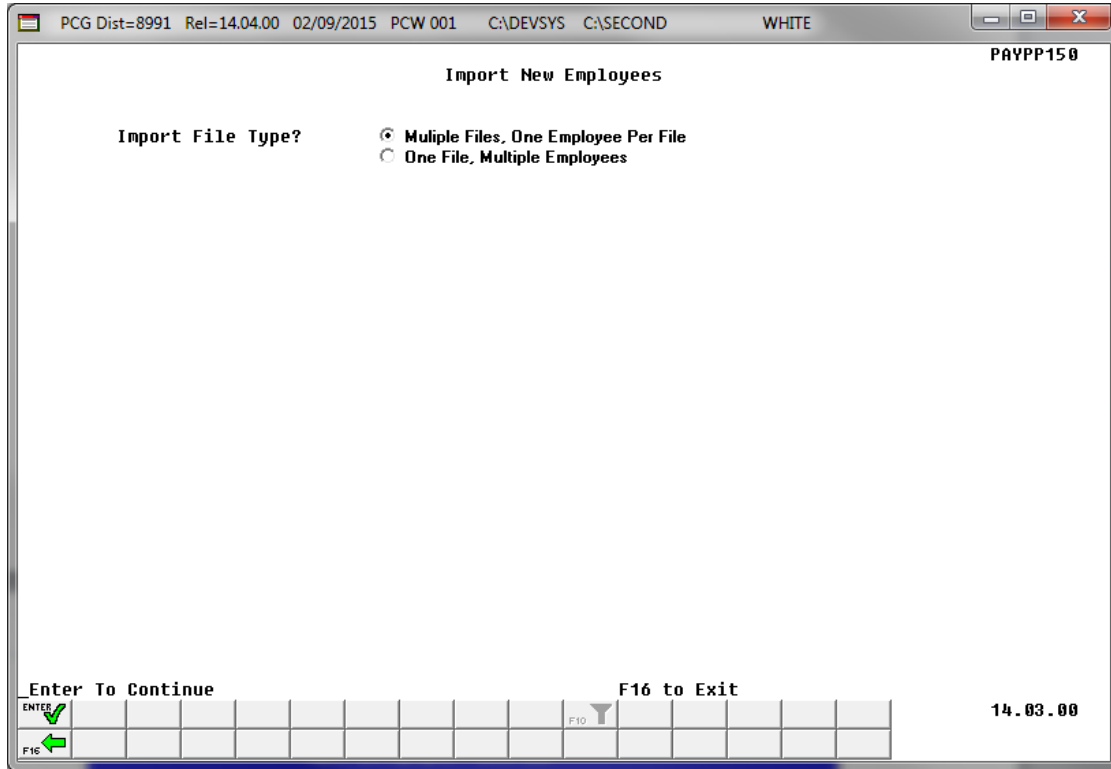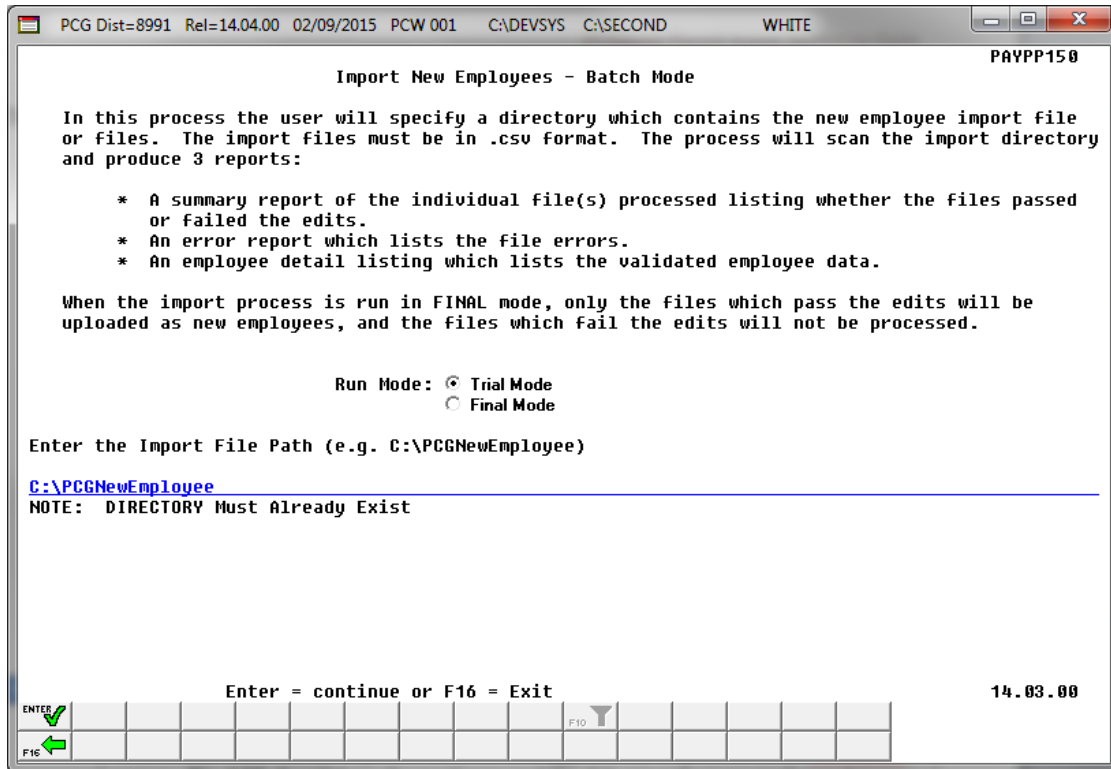
Step	Action
4	Select the ⊙ (**Radio Button**) to left of the appropriate response in the **Import File Type?** field.
	Select **Multiple Files, One Employee Per File** to load multiple employee import files at the same time.
	This process reads a <u>directory</u> which contains multiple single-employee import files, and imports all of the individual files at once. Users use the *PCG_New_One_Employee.xlsx* template in the creation of new employees imported with this method.
5	Select ✓ (**Enter**) to continue processing.

The following screen displays:

Step	Action
6	Select the ⊙ (**Radio Button**) to left of the appropriate response in the **Run Mode** field. **Trial Mode** validates the employee data but does <u>not</u> add any employees to the PCGenesis system. **Final Mode** validates the employee, and if valid, <u>saves</u> the new employee data to the PCGenesis system.
	After Trial Mode is run and the results are verified, select the **Final Mode** radio button in order to save the new employee data.
7	Verify **C:\PCGNewEmployee** has defaulted in the **Enter the Import File Path** field, and select ⊡ (**Enter**) twice.
	PCGenesis allows entries other C:\PCGNewEmployee as long as the directory structure entered exists.

If **Final Mode** is selected, the following dialog message box displays:
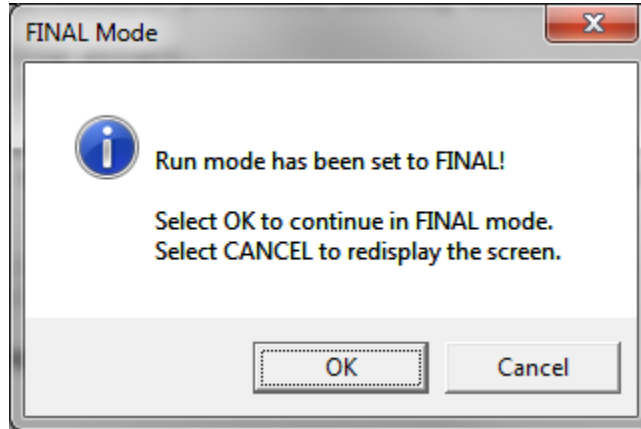
Step	Action
8	To run the process in **Final Mode**, select [OK].
	When the import process is run in FINAL mode, **only the files that pass the edits are uploaded** as new employees, and the files that fail the edits are not processed.

When running in **TRIAL mode,** the following screen displays:
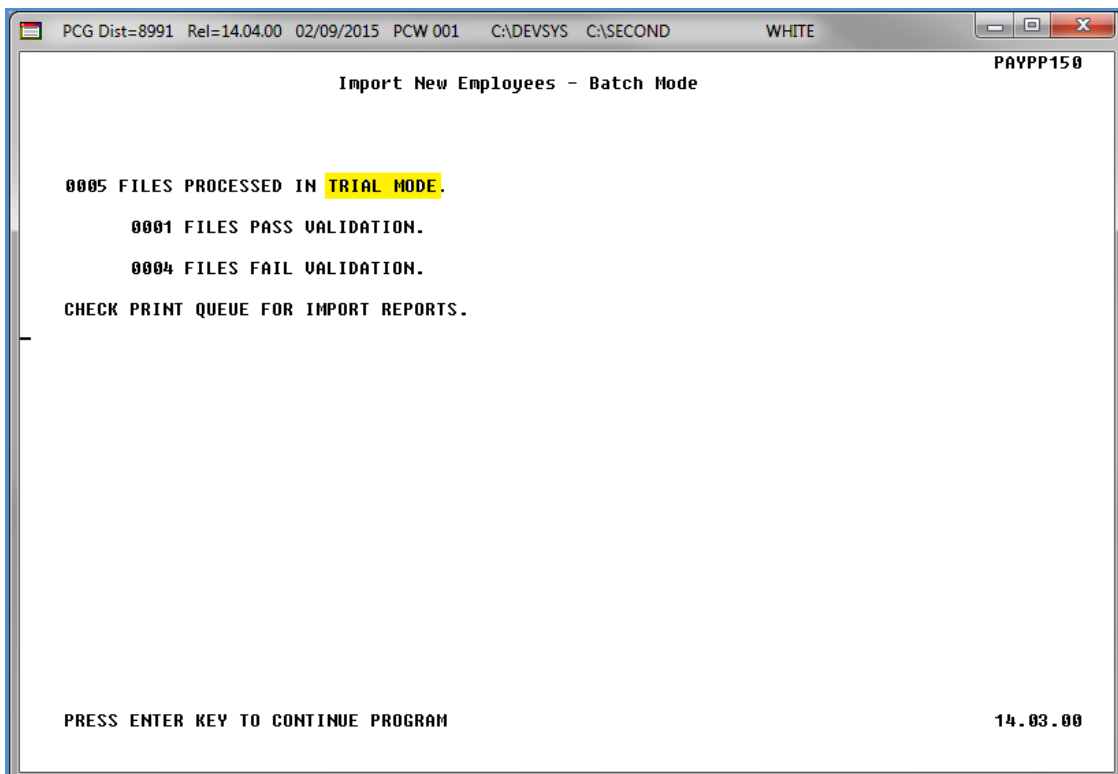
When running in **FINAL mode,** the following screen displays:

```
PCG Dist=8991  Rel=14.04.00  02/11/2015  PCW 001    C:\DEVSYS  C:\SECOND      WHITE                   _ □ ✕
                                                                                            PAYPP150
                         Import New Employees - Batch Mode



     0005 FILES PROCESSED IN  FINAL MODE .

          0001 FILES PASS VALIDATION.

          0004 FILES FAIL VALIDATION.

     CHECK PRINT QUEUE FOR IMPORT REPORTS.











     PRESS ENTER KEY TO CONTINUE PROGRAM                                            14.03.00
```
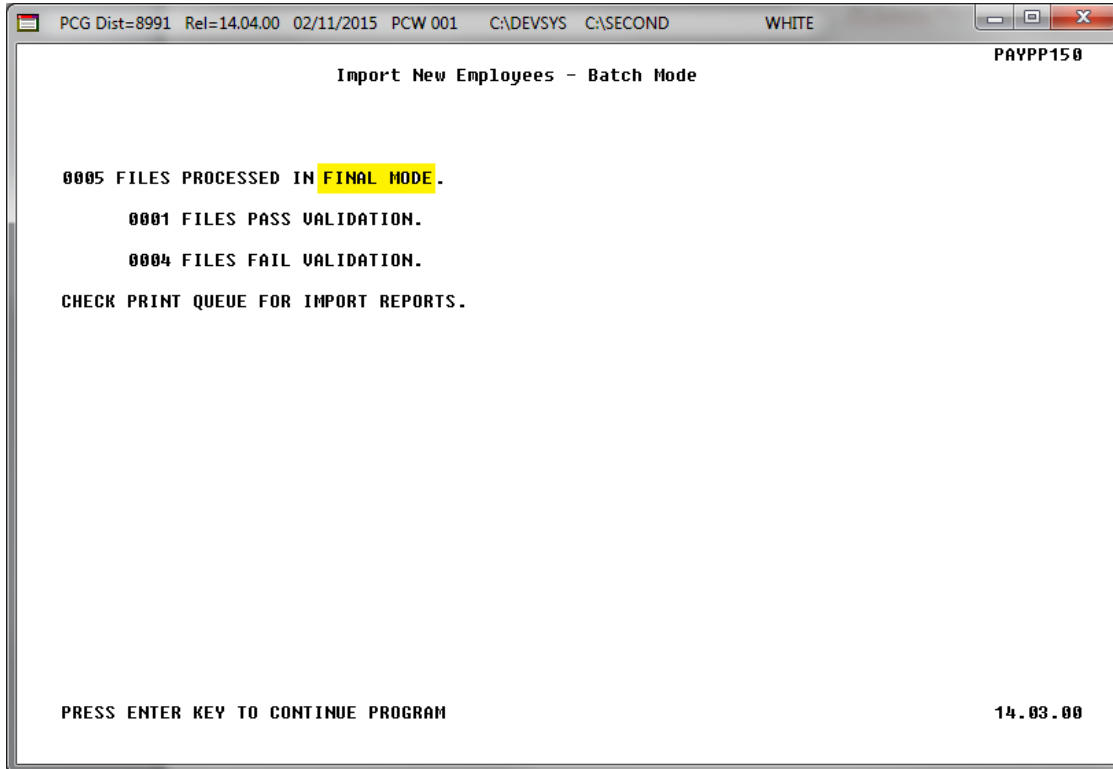
Step	Action
9	Select **ENTER** (**Enter**) to exit the program.

The following screen displays:

```
PCG Dist=8991 Rel=14.04.00 02/09/2015 PCW 001  C:\DEVSYS  C:\SECOND        WHITE            □ ⊡ ✕
                                      Payroll System                                    PAYM0016
      FKey                        Payroll Export/Import Menu
      ----
        1  -- Payroll Gross Data Export
        2  -- Payroll Gross Data Import

        3  -- Payroll Deduction Export
        4  -- Payroll Deduction Import

        5  -- Export Selected Payroll / Deduction / CPI Information
        6  -- Import Selected Payroll Information

        7  -- Earnings History Export
        8  -- Earnings History Gross Pay Distribution Export

        9  -- Import New Employees - Batch Mode
       10  -- Export New Hire File for Georgia Directory of New Hires




                                                                              11.02.00
  Master  User list
  F16  Que  Word  PAY      VEND
            MONITOR  MONITOR
```

Step	Action
10	**To print the report via the Uqueue Print Manager:** Select [Que] (**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.
11	Select [F16] (**F16** - Exit) to return to the *Payroll System – Special Functions Menu,* or select [Master] (**Master**) to return to the *Business Applications Master Menu.*
12	**For Trial Mode:** Correct all errors that appear on the *Employee New Hire Import Error Report*, and verify the accuracy of the employee data on the *New Employee Import - Valid Employees* report before running the procedure again in Final Mode. Repeat this procedure beginning at *Steps 3 – 11* to run the procedure in Final Mode.
	For Final Mode: Verify the employee records that were added to the system by reviewing the employee data on the *Payroll Update Menu*. Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing* for instructions on displaying and updating employee data.

A3.1. PCGenesis Employee New Hire Import Report - Example

```
Run date: 03/13/2017              EMPLOYEE NEW HIRE IMPORT REPORT                    Page:    1
Program: PAYPP150                                                           Run mode: TRIAL MODE
Import Directory: C:\PCGNewEmployee

 Import Filename
      Result          Empno      SSN        Last Name          First Name      Middle Name      Emp Stat

 PCGenesis New Employee 11111.csv
      *** ERRORS ***  078770   777-55-4444  HUDDLE             DEBRA           H.               ACTIVE

 PCGenesis New Employee 2678.csv
      *** ERRORS ***  002678   345-67-8901  HUDDLE             ALEMAN          H.               ACTIVE

 PCGenesis New Employee 33333.csv
      *** ERRORS ***  033333   345-67-8901  HUDDLE             DEBRA           H.               ACTIVE

 PCGenesis New Employee 44444.csv
      *** ERRORS ***  043434   345-67-8902  TESTCASE           DEBRA           H.               ACTIVE

 PCGenesis New Employee 498.csv
      *** ERRORS ***  000498   111-11-1111  HUDDLE             FREEMAN         H.               ACTIVE

 PCGenesis New Employee 8661.csv
      *** ERRORS ***  008661   345-67-8901  HUDDLE             WHITLOCK        H.               ACTIVE

 PCGenesis New Employee 9590.csv
      *** ERRORS ***  009590   345-67-8901  HUDDLE             VILLEDA         H.               ACTIVE

 PCG New Employee 78770.csv
          PASSED      078770   777-55-4444  HUDDLE             DEBRA           H                ACTIVE

 PCG New One Employee.csv
      *** ERRORS ***  032132   260-19-6629  ADKISON            SANDRA          MARIE            ACTIVE
```

Review the status of each import file processed. The *New Employee Import - Valid Employees* report contains information from the files that PASSED the validation process. The *Employee New Hire Import Error Report* contains information from the files that FAILED the validation process.

A3.2. PCGenesis New Employee Import - Valid Employees Report - Example

```
RUN DATE: 11/17/2022                    NEW EMPLOYEE IMPORT - VALID EMPLOYEES                          PAGE:    1
 PROGRAM: PAYPI150                          Multiple Files, One Employee                        Run mode: TRIAL MODE
Import Directory: C:\PCGNewEmployee

EMPLOYEE NO:  77766    SOC SEC: 777-66-5555    PAY CLASS: 07    PAY LOCATION: 0106    WORK LOCATION: 0106    JOB: 107    STATUS: A

       CERTIFICATE LEVEL:        YEARS OF STATE EXPERIENCE: 00    YEARS OF LOCAL EXPERIENCE: 00        CS1 JOB: 000

       EMPLOYEE NAME: SMITH, JANE H.                     BIRTH DATE: 11/01/1961    MARITAL STATUS: S    SEX: F    EEO5 ETHNIC: 02
              STREET: 1 WEST FIRST STREET                 HIRE DATE:  1/01/2012       GHI ELIG: Y                   EEO5 JOB: 000
          CITY/STATE: ATLANTA, GA                       GHI 1ST DAY:  1/01/2012    GHI DED CODE:  8          GHI PARTICIPANT: Y
                 ZIP: 30000                          GHI COVER START:  2/01/2012      GHI OPTION: B6                 GHI TIER: 10
           TELEPHONE: 444-555-6666                    HOURS PER WEEK:    24.00    SUBSTITUTE RANK:  2           BOE TRANSFER: Y
                CELL: 404-333-2222                            COUNTY:  160        BACKGROUND DT:  1/01/2015  GHI EMAIL PREF: P
           WRK EMAIL: JANE.SMITH@DOE.K12.GA.US
          PERS EMAIL: JSMITH@OUTLOOK.COM
     INCLUDE ON CPI? Y     HISPANIC: N    RACE CODES: WHITE

      FED: MAR: S  2020 W-4: Y  EXEMPT: 00        W/H CD: 0  AMT:    0.00  2 JOBS: Y  DEPEND:     33.33  OTHER:     44.44  DEDUCT: 55555.55
    STATE: MAR: A             ALLOW:  M-0 D-00  W/H CD: 0  AMT:    0.00

       PAY SCHEDULE #: 12         PAY CYCLE: 1     FEDERAL SWITCH: Y     STATE SWITCH: Y   FICA SWITCH: Y    RETIRE SWITCH: Y

        PENS ELIG DT:  1/01/2012   SALARY:   1504.00  CONTRACT:  35004.00    STATE:  30004.00  LOCAL:   5002.00     OTHER:    1002.00

        PENSION CODE: 0    PENSION AMT/PCT:     0.0000        CONTRACT MONTH: 09          SERVICE: 1          AEIC AMT:      0.00

     DD BANK CODE:      DD BANK ACCT:                  DD BANK TYPE:     DD METHOD:     DD AMT/%:

     ANNUITY #1: DED 01/CO 00            #2: DED 02/CO 00              #3: DED 13/CO 00
     ANNUITY #4: DED 14/CO 00            #5: DED 00/CO 00              CREDIT UNION: 00000000000000  SECTION 125: Y

    WARNING MESSAGES
    Employee Number: 077766
        The pension code is zero, no pension will be taken.
```

Review the employee data and the warning messages on the *New Employee Import - Valid Employees* report. After running the batch load process in Final Mode, review the *New Employee Import - Valid Employees* report for <u>additional</u> warning messages that may have occurred during the final processing.

A3.3. PCGenesis Employee New Hire Import Error Report - Example

```
Run date: 09/02/2010              EMPLOYEE NEW HIRE IMPORT ERROR REPORT              Page:    2

Program: PAYPI150          Load File Name: C:\PCGNewEmployee\New_Employee_55555.csv


Import Input Lines and Error Messages
------------------------------------------------------------------------------------------------------------

E2,,Pay location,999,,,,,Work location,999,,,Job code,888,,,,,,
     Empno  055555 INVALID PAY LOCATION


I1,,Hire date,13/32/2010,,,Birth date,13/32/2010,,Gender,X,,Marital status,X,,,,,,
     Line 00061 Invalid date:                     HIRE
     Line 00061 Invalid date:                     BIRTH


P1,,Pension switch,X,,Pens eligible date,13/32/2010,,,Pension code,6,,Service indicator,9,,,,,,
     Line 00067 Invalid date:                     Pens Date


H1,,GHI eligible?,X,,,Eligible date,13/32/2010,,,Deduction code,99,,,,,,,
     Line 00080 Invalid date:                     GHI ELIG DATE


H2,,Participate?,X,,,Effective date,13/32/2010,,,Option,77,Tier,77,,,,,
     Line 00081 Invalid date:                     GHI EFF DATE


Employee Number: 055555
     Field Name           Field Value    Error
     Status Code          T              Invalid value for field.
     Work Location        0000           Invalid value for field.
     Ethnic Code          88             Invalid value for field.
     GHI Option           77             Invalid value for field.
     GHI Tier             77             Invalid value for field.
     Gender Code          X              Invalid value for field.
     Race Codes           NNNNN          At least one race code must be selected
     Last Name                           Invalid value for field.
     Street                              Invalid value for field.
     City                                Invalid value for field.
     State                               Invalid value for field.
     Zip                                 Invalid value for field.
     Marital Status       X              Invalid value for field.
     Hire Date            00000000       Invalid value for field.
     Termination Date     000000         Mismatch between Status, Hire, Rehire, & Term dates. See Help
     GHI Eligible Flag    X              Invalid value for field.
     GHI Participation Sw X              Invalid value for field.
     GHI Deduction Code   99             Deduction code not valid or not setup as SHBP deduction
     Federal Marital Stat X              Invalid value for field.
     State Marital Status X              Invalid value for field.
     Federal W/H Code     6              Invalid value for field.
     State W/H Code       6              Invalid value for field.
     Federal Tax Switch   X              Invalid value for field.
     State Tax Switch     X              Invalid value for field.
     FICA Tax Switch      X              Invalid value for field.
     Retirement Switch    X              Invalid value for field.

End of File
```

Procedure B: Import New Employees – Batch Mode (One File, Multiple Employees)

In this procedure, the user specifies a comma-delimited file that contains multiple new employees to import. The import file must be in comma-delimited (.csv) format. The process scans the import data and produces two reports.

- *Employee New Hire Import Report*: A summary report of the individual employee(s) processed, listing whether the employees passed or failed the edits.
- *New Employee Import - Valid Employees*: An employee detail listing that lists the validated employee data. The reports also lists any errors for each employee, if errors exist.

The Import New Employees (One File, Multiple Employees) process can be run in two different modes: **Trial Mode** validates the employee data but does <u>not</u> add any employees to the PCGenesis system. **Final Mode** validates the employees, and if valid, <u>saves</u> the new employee data to the PCGenesis system. Trial Mode should always be run at least one time before running the import process in Final Mode. Final Mode should only be run after correcting all errors and verifying the accuracy of the employee data on the *New Employee Import - Valid Employees* report.

If any errors exist, <u>no</u> employees will be uploaded. Once all errors are corrected, the import process can be run in FINAL mode, **and all employees are uploaded** as new employees.

The following rules apply to the batch load process:

- Only active (status = **A**) or inactive (status = **I**) employees may be loaded with the batch load process. Terminated employees cannot be loaded with this utility.
- After the batch load process is run in Final Mode, the *New Employee Import - Valid Employees* report should be reviewed for additional warning messages that may have occurred during the final processing. For example, if the employee data contains a **Social Security Number** that is assigned to an employee already in the system, the following warning message is displayed: *WARNING - SSN already exists on PAYROLL file.*

Appendix B: Formatting the PCG_New_Multi_Employees.csv File (One File, Multiple Employees) provides a detailed description of the *.csv* file and its contents.

B1. Downloading the PCG_New_Multi_Employees.xlsx Template

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

Step	Action
1	On the **C:** drive, create a folder entitled **PCGNewEmployee**, or verify the folder exists.
2	Access the **"PCG New Multiple Employees Template"** (*PCG_New_Multi_Employees.xlsx*) file at the PCGenesis documentation website.
3	Save the *PCG_New_Multi_Employees.xlsx* template file to the **PCGNewEmployee** folder created in *Step 1*. Copy the *PCG_New_Multi_Employees.xlsx* template file to <u>each</u> <u>workstation</u> in which PCGenesis users will create and upload new employees.

B1.1. PCG_New_Multi_Employees.xlsx Template – Example

Header Columns A – H and Detail Columns I - R

Header Columns A – H and Detail Columns S - AD

Header Columns A – H and Detail Columns AE - AO

		1	2	3	4	5	6	40	41	42	43	44	45	46	47	48	49	50
															Federal			
			A=Active I=Inactive		Max 15 Characters	Max 15 Characters	Max 20 Characters	12, 13, 14, 15, 16	Y/N/M	Y/N	S/M/H	0 1 2 3			Y/N	Y/N		
	Line	Empno	Status	SSN	First Name	Middle Name	Last Name	No Pension Code	FICA	Switch	Mar Stat	W/H	Addl Amt/%	Exemp	2020 W-4	Two Jobs?	Depend Amt	Other Income

PCG New Hire Multiple Import   v 9.00

NOTE: **Commas may not be entered into any input field.**

All Dates must be in MM/DD/CCYY format

Header Columns A – H and Detail Columns AP – AZ

		1	2	3	4	5	6	51	52	53	54	55	56	57	58	59	60	61	62
											State						Salary		
			A=Active I=Inactive		Max 15 Characters	Max 15 Characters	Max 20 Characters		Y/N	A B C D E 8	0 1 2 3								
	Line	Empno	Status	SSN	First Name	Middle Name	Last Name	Deduct Amt	Switch	Mar Stat	W/H	Addl Amt/%	Mar Allow	Dep Allow	State	Local	Other	Contract	Cycle Gr

PCG New Hire Multiple Import   v 10.00

NOTE: **Commas may not be entered into any input field.**

All Dates must be in MM/DD/CCYY format

Header Columns A – H and Detail Columns BA – BL

		1	2	3	4	5	6	63	64	65	66	67	68	69	70	71	72	73	74	75
														State Health						
			A=Active I=Inactive		Max 15 Characters	Max 15 Characters	Max 20 Characters	9 10 11 12	9 10 11 12	1=Cal 2=Sch 3=Fisc	Y/N	Y/N	Y/N/D							P/W
	Line	Empno	Status	SSN	First Name	Middle Name	Last Name	Contr Mo	PY Contr Mo	Cycle Code	Elig	Part	BOE Transfer	1st Day Work	Coverage Start Date	Ded Code	Option	Tier	Hours per wk	Email Pref

PCG New Hire Multiple Import   v 10.00

NOTE: **Commas may not be entered into any input field.**

All Dates must be in MM/DD/CCYY format

Header Columns A – H and Detail Columns BM – BY

		1	2	3	4	5	6	76	77	78	79	80
									Leave Fields		**Misc**	
			A=Active I=Inactive		Max 15 Characters	Max 15 Characters	Max 20 Characters	Y/N	1 2 3 4 5		Max 50 Characters	Max 50 Characters
Line	Empno	Status	SSN	First Name	Middle Name	Last Name	Sick Bank	Sub Rank	Hours per day	Work E-mail	Personal E-mail

PCG New Hire Multiple Import v 10.00

NOTE: Commas may not be entered into any input field.

All Dates must be in MM/DD/CCYY format

Header Columns A – H and Detail Columns BZ – CD

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

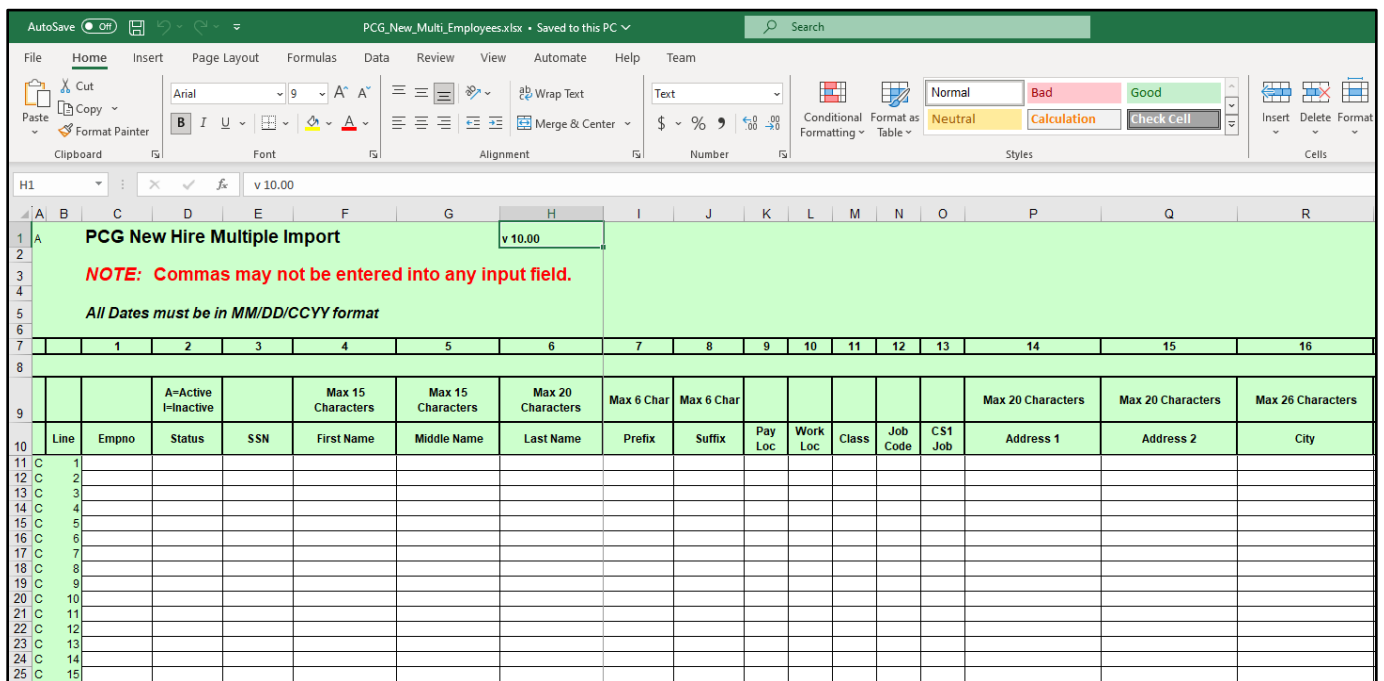*Note:* The PCG New Hire Multiple Import template is version **10.00**.

B2. Saving the PCG_New_Multi_Employees.xlsx Template as a Microsoft® Excel Spreadsheet/Workbook

Step	Action
1	Verify the *PCG_New_Multi_Employees.xlsx* template exists within **C:\PCGNewEmployee**. *If the file or folder does not exist, refer to B1. Downloading the PCG_New_Multi_Employees.xlsx Template for the instructions.*
2	Within Microsoft® Excel, access and open *PCG_New_Multi_Employees.xlsx* template file.

The following window displays:

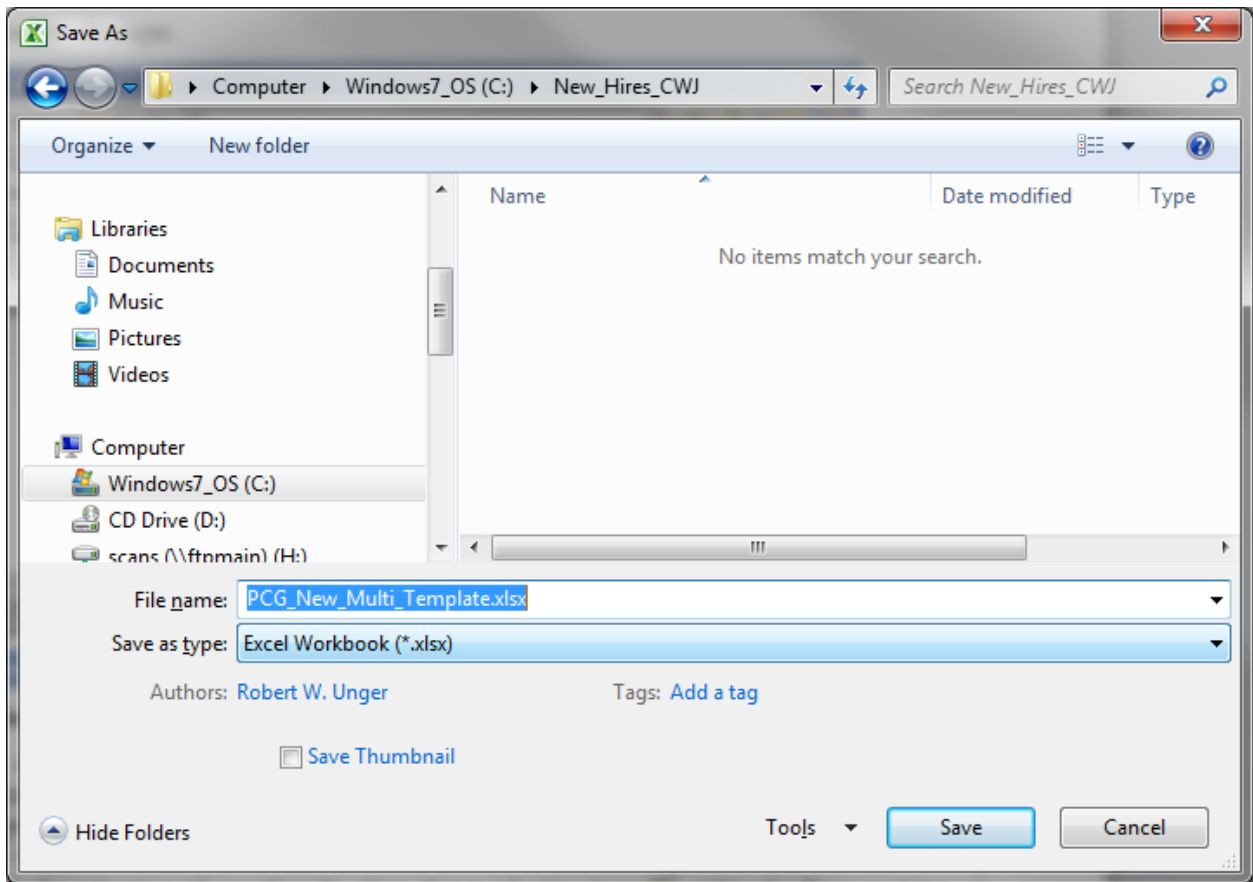| Step	Action
3	Select ![save icon] (**Save**)**,** or from the *Menu Bar,* select **File → Save As**.
4	Within the **Save in**: field, navigate to the **C:\PCGNewEmployee** folder, or to the appropriate file location. *Within the screenshot examples, a folder entitled "New_Hires_CWJ" was created to easily identify the user's new employee files.*

The following window displays:

Step	Action
5	**Optional:** Enter **PCG_New_Multi_Template** in the **File name** field. *This step is optional. Saving the files in this step provides a safeguard against the selection of the wrong template file during the import process while maintaining the integrity of the original template.*

Step	Action
6	Verify the selection of, or select the drop-down selection icon ▾ within the **Save as type** field to choose *Microsoft Excel Workbook (.xlsx)*. *Saving the file initially as a Microsoft® Excel spreadsheet/workbook simplifies making modifications for PCGenesis users.*
7	**Select** ⬚ Save ⬚ (Save).

B3. Using the PCGenesis Template to Create a New Employee

IMPORTANT

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

Step	Action
1	Access the Microsoft® Excel spreadsheet/workbook saved in *B2. Saving the PCG_New_Multi_Employees.xlsx Template as a Microsoft® Excel Spreadsheet/Workbook.*
2	Enter employee data into the spreadsheet/workbook.

The following window displays:

Step	Action
3	Enter the employee number in the **Emp. no.** (Employee Number) field.
	The employee number is school district-specific, and must be unique for each employee.
	*The **Employee Number** is required, and must be correct and accurate before the export file will load.*
4	Verify or enter **A** (Active) or **I** (Inactive) in the **Active/Inactive** field to identify the employee's status.
	Note: **T** *(Terminated) is not a valid status code for a new employee, and will cause an error during processing.*
5	Enter the employee's social security number in the **SSN** (Social Security Number) field in either of the following two formats:
	• Eleven (11) alphanumeric characters representing the employee's social security number in the format ###-##-#### (with dashes).
	• Nine (9) digits representing the social security number in the format ######### (without dashes).
	If the employee's social security number is unknown at the time the employee's record is created, enter all nine's (999-99-9999) in the field <u>temporarily</u>. Enter the employee's <u>actual</u> social security number in the SSN (Social Security Number) field <u>before</u> W2 calendar year-end processing. PCGenesis automatically updates this information for the employee's earnings history information.
6	Enter the employee's first name and middle name or middle initial, up to fifteen (15) characters each in the **(NAME) First** and **(NAME) Middle** fields.
	The First name is a required field. The Middle name or initial is an optional field.
7	Enter the employee's last name, up to twenty (20) characters in the **(NAME) Last** field.
	The last name field is a required field.
8	Enter the employee's professional title in the **(NAME) Prefix** field.
	PCGenesis uses this field for such processes as contract processing. An example of an entry would include Dr. (Doctor).
9	Enter the suffix for the employee's name in the **Suffix** field.
	Examples of this entry include Sr. (Senior) or Jr. (Junior).
10	Enter the location code in the **Pay Location** field to choose the employee's payroll location.
	*The **Pay Location** code is required, and must be correct and accurate before the export file will load.*

Step	Action
11	Enter the location code in the **Work Location** field to choose the employee's primary work location code.
12	Enter the class code in the **Class** field to choose the employee's pay class. *The **Class** code is required, and must be correct and accurate before the export file will load.*
13	Enter the job code in the **Job Code** field to choose the employee's job classification.
14	Enter the employee's CPI job code in the **CS1 Job (from CPI)** field. *The GaDOE provides a complete listing of CPI job codes at http://app.doe.k12.ga.us/ows-bin/owa/cpi_pack_codes01.entry_form.*
15	Enter the employee's street/mailing address, up to thirty (30) characters per field, in the **Address Line 1** and **Address Line 2** fields.
16	Enter the employee's city in the **City** field, up to twenty-six (26) characters, and the two-character state code in the **St** (State) field. *Do NOT enter a comma (,) to separate the two entries.*
17	Enter the employee's postal code, including the *Zip+4* postal codes where appropriate, in the **Zip code** field.
18	**SHBP/GHI (Required):** Enter the county of residence code in the **County** field. *Refer to the "Georgia County Code Listing" for a complete listing of Georgia counties and county codes.*
19	Enter the employee's telephone number(s) including the area code, up to ten (10) digits, in the **Phone** field and the **Cell Phone** field, if applicable. Enter digits only, no dashes.
20	Enter the employee's <u>initial</u> hire date (MM/DD/CCYY) in the **Hire Date** field.
21	Enter the employee's date of birth (MM/DD/CCYY) in the **Birth Date** field.
22	Enter the employee's background-check date (MM/DD/CCYY) in the **Background Check Date** field.
23	Enter **F** (Female) or **M** (Male) in the **Gender** field to identify the employee's gender.
24	Enter **M** (Married) or **S** (Single) in the **Marital Status** field.
25	Enter the code in the **EEO-5 Job** field to choose the employee's EEO-5 job code. *The **EEO-5 Job** code is necessary in order to support EEO-5 reporting and file transmission to the Federal government.*

Step	Action
26	Enter the ethnic code in the **Ethnic Code** field to choose the employee's ethnicity. *If leaving the field blank, an E (Ethnicity) record containing all zeroes (0's) and the description of "Unspecified" must exist in the payroll Description File.*
27	Enter **Y** (Yes) or **N** (No) in the **CPI?** field to identify the employee's inclusion in, or exclusion from CPI reporting.
28	Enter **Y** (Yes) or **N** (No) in the **Hispanic** field to identify whether or not the employee is of Hispanic descent.
29	Enter **Y** (Yes) or **N** (No) in the appropriate race fields: **Am Indian** (American Indian)**, Black, White, Asian, Pacific** to identify an employee's ethnicity. *At least one response must by Y (Yes).*
	Pension Fields
30	Enter the appropriate response or code in the **Pension Switch** field**:** Valid entries include **Y** (Compute Pension), **N** (Do not Compute Pension), and **R** (TRS only: Employer pays both employer and employee shares – SB327).
31	Enter the date (MM/DD/CCYY) on which the employee becomes eligible to participate in the school district's retirement plan in the **Pens Eligible Date** (Pension Eligibility Date) field.
32	Enter the appropriate code in the **Pension Code** field: Valid entries include **0** (No Pension Participation), **1** (Old PSERS Participation), **2** (TRS Pension Participation), **3** (Old ERS Participation), **4** (New ERS Participation), or **5** (New PSERS Participation).
33	Enter **0** (No Service Credit) or **1** (Service Credit Earned for month) in the **Service Indicator** field.
34	Enter the code in the **No pension code** field to choose the reason for no public pension. The **No pension code** field has been added to support the new *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**'.

Step	Action
	Federal Fields
35	Enter the appropriate response or code in the **FICA Tax Switch** (Federal Insurance Contributions Act Tax Switch) field: Valid Values: **Y** = Compute OASDI/Medicare **N** = Do NOT compute OASDI/Medicare **M** = Compute Medicare only
36	Enter the appropriate response in the **Federal Tax Switch** field: Valid Values: **Y** = Compute withholding **N** = Do NOT compute withholding
37	Verify or enter the employee's federal income tax marital status code in the **Federal: Marital Status** field. Valid Values: **M** = Married **S** = Single **H** = Head of Household (valid for 2020 W-4 or later)
38	Verify or enter the employee's federal income tax withholding code in the **Federal: W/H Code** (withholding code) field: Valid Values: **0** = Normal Federal tax from tax table **1** = Normal Federal tax from tax table + flat amount **2** = Flat amount only **3** = Flat percentage only
39	The **Federal Additional Withholding Amount/Percent** field is used in conjunction with the **Federal Withholding Code**. If the **Federal Additional Withholding Amount/Percent** value is a whole number, it will be treated as a flat amount (codes 1 & 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the employee's additional federal income tax amount <u>or</u> the tax percentage in the **Federal Additional Withholding Amount/Percent** field, where appropriate. *Required for Step 38 (1, 2, or 3 entries). Values less than 1.00 are regarded as percentages (%).*
40	**W-4 Prior to 2020:** Verify or enter the number of federal income tax exemptions in the **Federal: Exemptions** field. *When the number of federal income tax exemptions exceeds ten (10), submit the employee's W-4 form to the Internal Revenue Service. Refer to Line 5 of the W-4 form for the Federal: Exempt field's information.*
41	Enter the appropriate response in the **2020 W-4?** field. Valid Values: **Y** = Employee's W-4 form is from 2020 or later **N** = Employee's W-4 form is from prior to 2020

Step	Action
42	**New 2020 W-4: Two jobs flag**. If the **2020 W-4?** field value is 'Y', enter 'Y' if the employee has checked the *Step 2* checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household. Valid Values: **Y** = *Step 2* checkbox is checked on the 2020 W-4 **N** = *Step 2* checkbox is <u>not</u> checked on the 2020 W-4
43	**New 2020 W-4: Depend amount** (dependent amount). If the **2020 W-4?** field value is 'Y', enter the amount from *Step 3* of the 2020 W-4 form as the amount claimed for dependents.
44	**New 2020 W-4: Other income**. If the **2020 W-4?** field value is 'Y', enter the amount from *Step 4a* of the 2020 W-4 form as the amount claimed for other income.
45	**New 2020 W-4: Deduct amount** (deduction amount). If the **2020 W-4?** field value is 'Y', enter the amount from *Step 4b* of the 2020 W-4 form as the amount claimed for deductions.
	State Fields
46	Enter the appropriate response in the **State Tax Switch** field. Valid Values: **Y** = Compute withholding **N** = Do NOT compute withholding
47	Verify or enter the employee's state income tax marital status code in the **State: Marital Status** field. Valid Values: **A** = Single **B** = Married Filing Separate, or Married Filing Joint, both spouses working **C** = Married Filing Joint, one spouse working **D** = Head of Household **8** = Exempt – Servicemembers Civil Relief Act A marital status of '8' will cause all wages to be exempt from reporting for Georgia state wages, and will cause zero Georgia tax to be withheld from the employee's paycheck. The *Department of Labor Quarterly Payroll Report and Wages Data File*, and the W-2 forms will both treat any wages on the Earnings History records with a Georgia marital status of '8' as Georgia exempt wages, and these wages will not be included in these tax reports.
48	Verify or enter the state income tax withholding code in the **State: W/H Code** (withholding code) field. Valid Values: **0** = Normal state tax from tax table **1** = Normal state tax from tax table + flat amount **2** = Flat amount only **3** = Flat percentage only

Step	Action
49	The **State Additional Withholding Amount/Percent** field is used in conjunction with the **State Withholding Code**. If the **State Additional Withholding Amount/Percent** value is a whole number, it will be treated as a flat amount (codes 1 & 2). If the value is less than 1, it will be treated as a percentage (code 3). Verify or enter the additional state income tax amount <u>or</u> the total percentage in the **State Additional Withholding Amount/Percent** field, where appropriate. *Required for Step 48 (1, 2, or 3 entries). Values less than 1.00 are regarded as percentages (%).*
50	Verify or enter the total number of marital allowances from Line 5 of the G-4 form in the **State: Allowance Mar** (State: Marital Allowance) field. Verify or enter the number of dependent allowances (Line 4 of the G-4 form) in **State: Allowance Dep** (State: Dependent Allowance) field. <u>NOTE</u>: As of 2024, the Georgia withholding formula does <u>not</u> use a **Marital Allowance.** Even though this field is still available on the employees' *Update/Display Withholding Data* screen, the **Marital Allowance** value will be ignored. *When the number of State of Georgia income tax exemptions exceeds fourteen (14), submit the employee's G-4 form to the Georgia Department of Revenue. Refer to Line 4 and Line 5 of the G-4 form for State: Marital Allowance information.*
	Salary Fields
51	Enter the employee's State of Georgia-funded annual salary in the **State Salary** field.
52	Enter the employee's local annual salary in the **Local Salary** field.
53	Enter the employee's additional salary in the **Other Salary** field.
54	Enter the employee's contractual total dollar amount in the **Contract Amount** field.
55	Enter the employee's cycle gross salary in the **Cycle Gross** field. *Enter Certified employees' cycle gross information in the Cycle Gross field.*
56	Enter the total number of contract months the employee <u>works</u> in the **Contract Months** field. *For Contract Months field entries, PCGenesis requires an entry in the Contract Amount field at Step 54.*

Step	Action
57	Enter the employee's contract month setting for the prior year in the **PY Contmo** (Prior Year Contract Months) field.
	Valid values: **9 - 12** = Number of prior year contract months
	PCGenesis automatically rolls this information from the current year contract months setting once a year by the "Update Job Code for CPI/Payroll/CS1" procedure. PCGenesis uses this field during accrual processing to preserve the prior year's setting for accrual amount calculation. PCGenesis also uses the field to report changes made to the current year's setting for position changes effective for the new fiscal year.
58	Enter the appropriate code in the **Cycle Code** for year-to-date amount accumulations. **Valid entries include 1 (Calendar Year), 2 (School Year) and 3 (Fiscal Year).**
	State Health Fields
59	**GHI Eligible? field – SHBP/GHI Required:** Enter **Y** (Yes – Employee is eligible to receive benefits) or **N** (No – Employee is not eligible to receive benefits) in the field to choose the employee's plan eligibility.
60	**Participate? field - For Classified and Substitute Employees:** Enter **Y** (Yes – Employee participates in SHBP) or **N** (No – Employee does not participate in the SHBP) to choose the employee's plan participation.
	• Enter **N** (No) if the employee option in *Step 65* will be **NC** (No Coverage) or **NE** (Not Eligible), and the tier in *Step 66* will be **00** (No Coverage).
	• Enter **Y** (Yes) if the employee option and tier in *Step 65* and in *Step 66* will be codes other than **NC** (No Coverage) or **NE** (Not Eligible) and **00** (No Coverage).
	Starting **July 1, 2012**, Direct Billing for certificated employees covered by SHBP takes effect. SHBP moves from a percentage of state-based salaries for every SHBP-*eligible* certificated employee and instead begins paying a "direct" per member per month (PMPM) rate (i.e., a flat rate) for each certificated employee *enrolled* in the SHBP. *Therefore, an employer contribution will NOT be billed for employees with a **GHI Option** field of NC (No Coverage) or NE (Not Eligible).*
61	**BOE Transfer** field **–** Required if the **GHI Eligible?** field is set to '**Y**'.
	The **GHI BOE Transfer** field indicates whether or not the employee transferred from another school district. Valid values for the field are Yes (**Y**), No (**N**) and 'Don't know' (**D**). This field is mostly informational; however, this data should be discovered from the employee so that SHBP benefits are transferred to the new school district correctly. If the **GHI BOE Transfer** field is set to '**Y**', but a **GHI Coverage Start Date** has not been entered, a <u>warning</u> message will be printed on the *New Employee Import Report*.
62	**GHI 1ˢᵗ Day Wrk (GHI 1ˢᵗ Day Worked)** field **–** Required if the **GHI Eligible?** field is set to '**Y**'.
	Enter the first date (MM/DD/CCYY) for which the employee is compensated.

Step	Action
63	**GHI Coverage Start Date –** Optional if the **GHI Eligible?** field is set to '**Y**'. The date (MM/DD/CCYY) the employee's benefit coverage starts at the employing agency. This field should only be used for summer transfers from May 1 through October 31. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system.
64	**GHI Deduction Code field -** Required if the **Participate in GHI?** field is set to '**Y**'. Enter the system deduction code which represents the SHBP/GHI deduction. *An invalid entry in this field will generate the "Deduction Code not valid or not set up as SHBP Deduction" message. Refer to Section F: Description/Deduction/Annuity File Processing for the instructions on the entry of this code.*
65	**GHI Option field** - Required if the **Participate in GHI?** field is set to '**Y**'. Using the SHBP's supporting documentation for the current year, enter the employee's health plan code. *PCGenesis defaults this entry to NC (Waived Coverage).* *While not included in the Add New Employee procedure, PCGenesis automatically enters the deduction amount for the field's entry on the employee's Deduction screen. The Update/Display Deduction Data screen is accessed by selecting F3 (Update/Display Deduction Data) from the Payroll System – Payroll Update Menu.*
66	**GHI Tier field -** Required if the **Participate in GHI?** field is set to '**Y**'. Enter the employees' level of coverage (tier) code (##). *PCGenesis defaults this entry to 00 (SHBP Waived).*
67	**Hours / Week:** Required if the **Participate in GHI?** field is set to '**Y**'. Enter the number of hours per week the employee works in the **Hours/Week** field.
68	**Email Preference:** Required. This field designates whether the employee prefers to send their work e-mail address or their personal e-mail address to the State Health Benefits Program (SHBP). Valid Values: **P** = Send the personal e-mail address to SHBP **W** = Send the work e-mail address to SHBP *PCGenesis defaults this entry to* **W** *(send work e-mail address to SHBP).*
	Leave Fields
69	**Sick Bank:** Enter **Y** (Yes – Employee is enrolled in the system sick bank) or **N** (No – Employee is not enrolled in the system sick bank) in the field.

Step	Action
70	Enter the substitute's rank in the **Substitute Rank** field to choose the employee's substitute rank. *The **Substitute Rank** code is used when the Enhanced Substitute Pay and Employee Leave System is enabled on the Tax/Withholding/Control Menu.*
71	Enter the number of hours per day the employee works in the **Hours Per Day** field.
	Miscellaneous Fields
72	**Work E-mail**: Enter the employee's work e-mail address, up to fifty (50) characters, in the **Work E-mail** field. The e-mail address must contain one '@' sign.
73	**Personal E-mail**: Enter the employee's personal e-mail address, up to fifty (50) characters, in the **Personal E-mail** field. The e-mail address must contain one '@' sign.
	Final Steps
74	Select 💾 (**Save**)**,** or from the *Menu Bar,* select **File → Save**.
75	Proceed to B*4. Modifying and Saving the PCG_New_Multi_Employees.csv File in Microsoft® Excel.*

B4. Modifying and Saving the PCG_New_Multi_Employees.csv File in Microsoft® Excel

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

Step	Action
1	Access the Microsoft® Excel spreadsheet/workbook saved in *B3. Using the PCGenesis Template to Create a New Employee*.
2	From the *Menu Bar,* select **File → Save As**.
3	Within the **Save in**: field, navigate to the **New_Hires_CWJ** or to the appropriate file location.
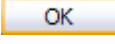
The following window displays:
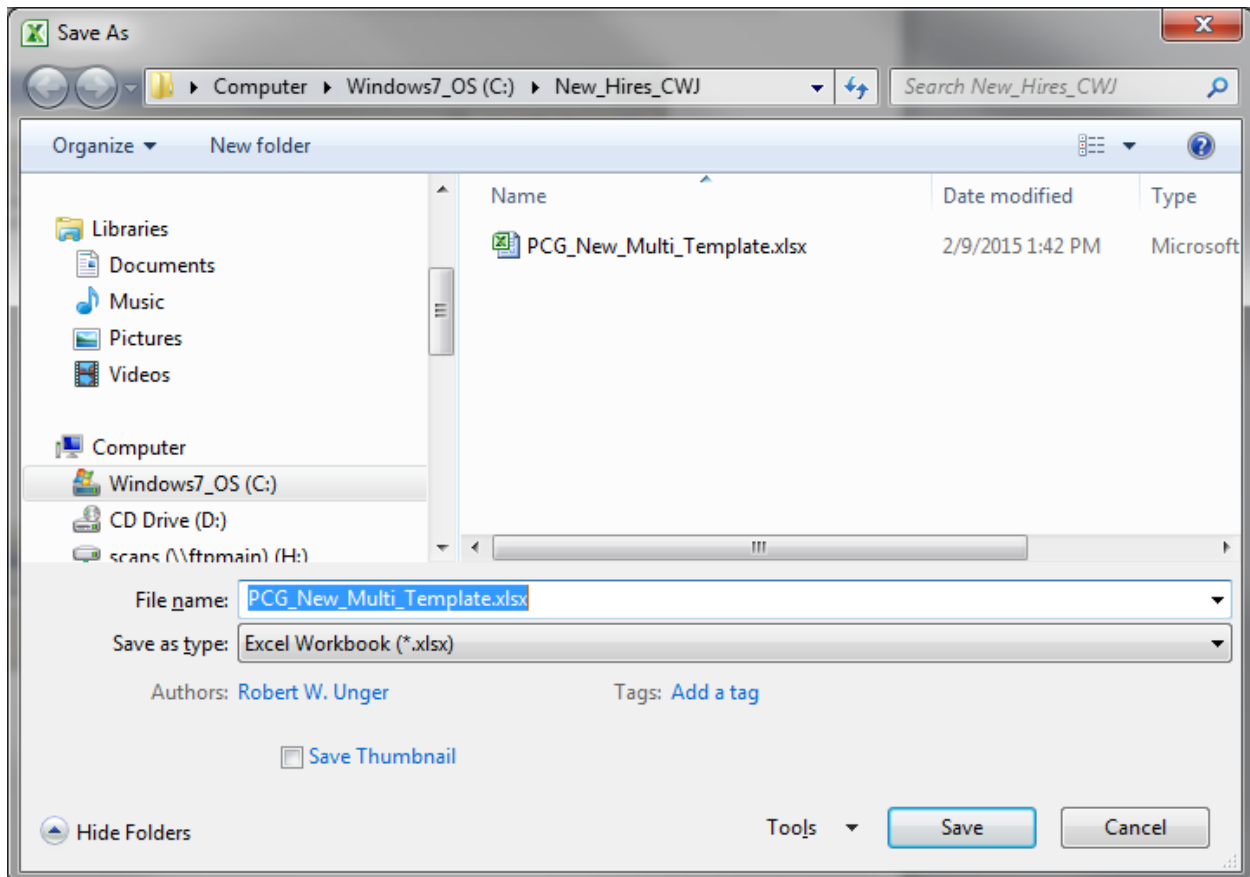
Step	Action
4	Select the drop-down selection icon ▼ within the **Save as type** field and select *CSV (Comma delimited)(*.csv)*.
5	Verify or enter **PCG_New_Multi_Employees.csv** in the **File name** field.

The following window displays:
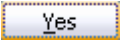
Step	Action
6	Select ▭ Save ▭ (**Save**). *If the "Microsoft Office Excel – The selected file type does not support workbooks that contain multiple sheets." dialog box displays, select* ▭ OK ▭ *(OK).*

The following dialog box displays:
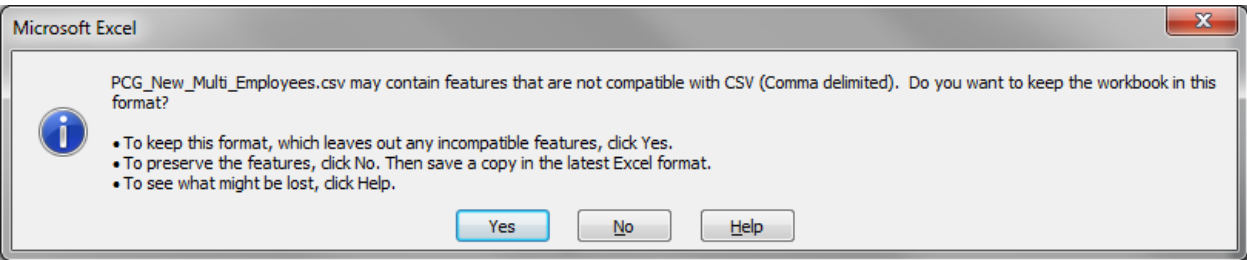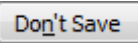
Do not become alarmed, this dialog box always displays.

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

The following dialog box displays:

Step	Action
9	**If no additional modifications were made since Step 6:** Select **Don't Save** (**Don't Save**). **For additional modifications since Step 6:** Select **Save** (**Save**)**,** and repeat *Steps 1 – 8* to save the file.

B5. Importing the PCG_New_Multi_Employees.csv File into PCGenesis

B5.1. Performing a PCGenesis Data Backup

* * * ATTENTION * * *

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

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

B5.2. Importing the Microsoft® Excel PCG_New_Multi_Employees.csv File into PCGenesis

Step	Action
1	From the *Business Applications Master Menu*, select ⬜2 (**F2 -** Payroll System).

The following screen displays:
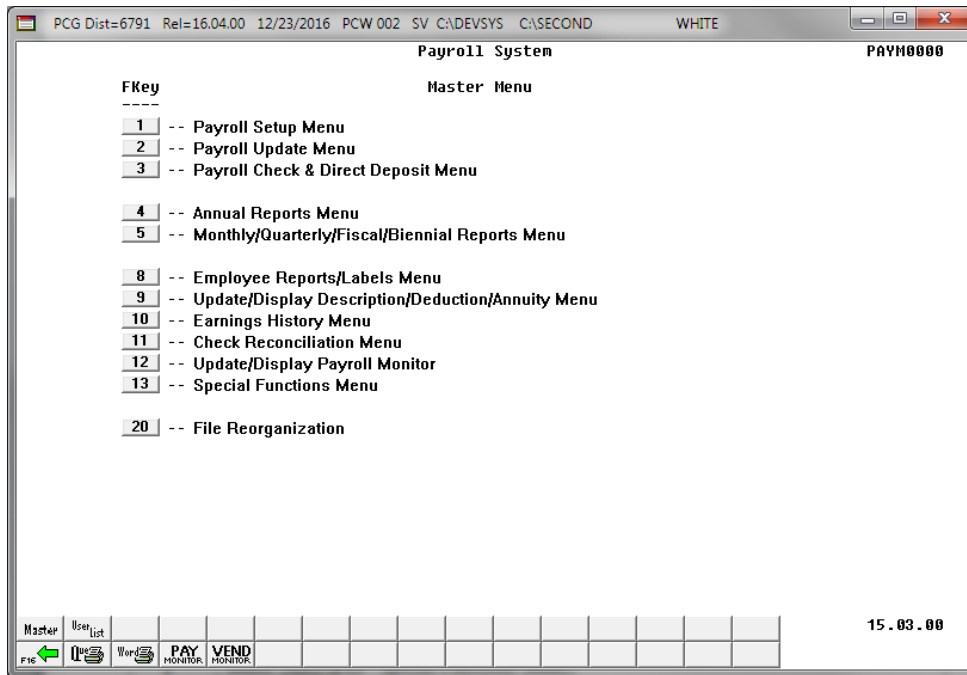
Step	Action
2	Select ⬜13 (**F13 -** Special Functions Menu).

The following screen displays:
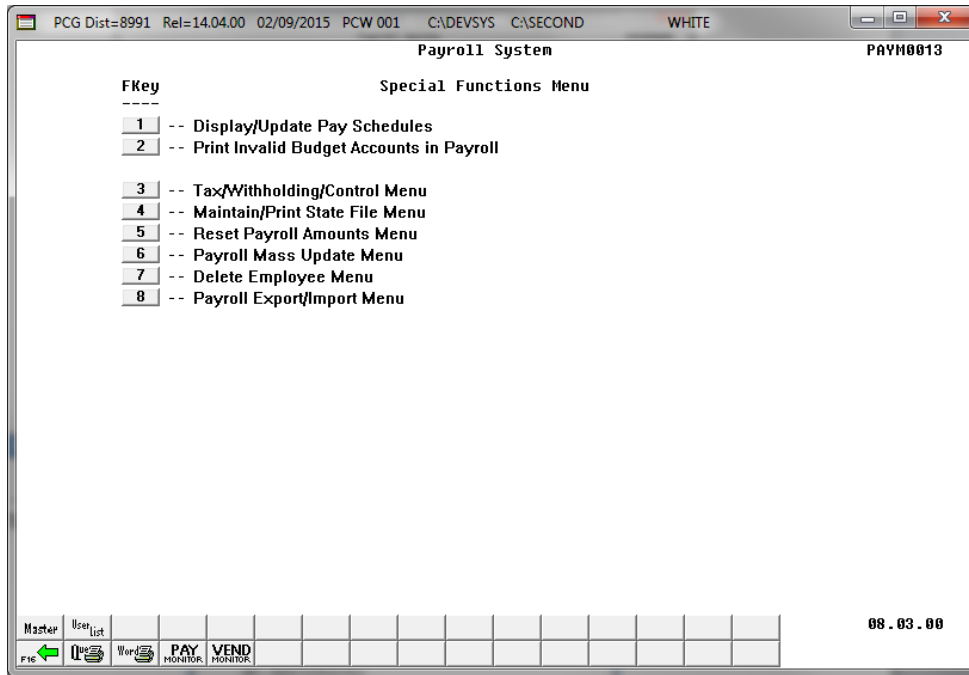
Step	Action
3	Select 8 (**F8** - Payroll Export/Import Menu).

The following screen displays:
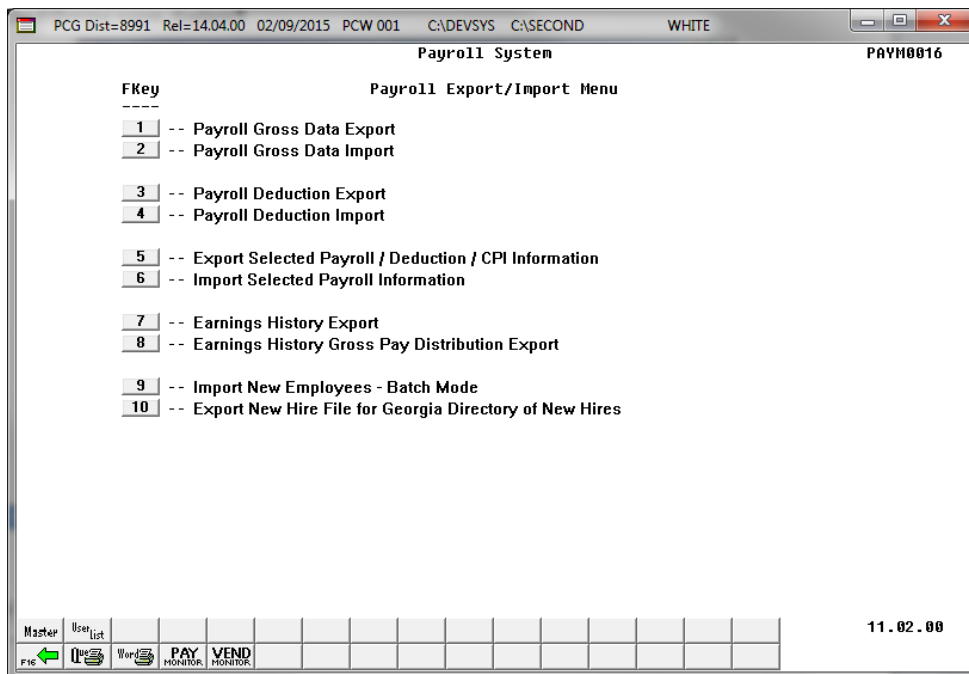
Step	Action
4	Select 9 (**F9** – Import New Employees – Batch Mode).

The following screen displays:

Step	Action
5	Select the ⊙ (**Radio Button)** to left of the appropriate response in the **Import File Type?** field.
	Select **One File, Multiple Employees** to load one import file with multiple employees at the same time.
	This process reads a single .csv file which contains multiple employees, and imports all of the employees at once. Users use the *PCG_New_Multi_Employees.xlsx* template in the creation of new employees imported with this method.
6	Select ✓ (**Enter**) to continue processing.

The following screen displays:

Step	Action
7	Select the ⊙ (**Radio Button**) to left of the appropriate response in the **Run Mode** field. **Trial Mode** validates the employee data but does <u>not</u> add any employees to the PCGenesis system. **Final Mode** validates the employee, and if valid, <u>saves</u> the new employee data to the PCGenesis system. After Trial Mode is run and the results are verified, select the **Final Mode** radio button in order to save the new employee data.
8	Enter the file and pathname in the field using the naming convention from *B4. Modifying and Saving the PCG_New_Multi_Employees.csv File in Microsoft® Excel.* *For **F10** (Browse for file) selections, PCGenesis defaults the Browse window to the .csv file type where appropriate. PCGenesis users may select either the CSV (Comma delimited) (*.csv) or the All Files (*.*) options from the drop down file listing for file type selection. PCGenesis displays a warning message dialog box when an import filename does not contain the .csv file extension.*

Step	Action
9	Select [ENTER ✓] (**Enter**). *PCGenesis allows entries other C:\IMPORT\NEWEMPIMPORT.CSV as long as the file exists.*

If **Final Mode** is selected, the following dialog message box displays:

Step	Action
10	To run the process in **Final Mode**, select [OK]. When the import process is run in FINAL mode, if any errors exist, <u>no</u> employees will be uploaded. Once all errors are corrected, the import process can be run in FINAL mode, **and all employees are uploaded** as new employees.

When running in **TRIAL** mode**,** the following screen displays:

```
PCG Dist=8991  Rel=14.04.00  02/09/2015  PCW 001     C:\DEVSYS   C:\SECOND          WHITE          ___ _ X
                                                                                            PAYPI150
                      Import New Employee - One File, Multiple Employees

                         C:\NEW_HIRES_CWJ\PCG_NEW_MULTI_EMPLOYEES.CSV


           1 Files Processed in  TRIAL MODE

                  0 Employee(s) Pass Validation

                  1 Employee(s) Fail Validation

         Check Print Queue for Import Reports













      Enter to Continue
 ENTER                                                                                        15.01.00
   ✓
 F16
```

When running in **FINAL** mode and errors exist**,** the following screen displays:

```
PCG Dist=8991  Rel=14.04.00  03/11/2015  PCW 001  SV  C:\DEVSYS   C:\SECOND          WHITE          ___ _ X
                                                                                            PAYPI150
                      Import New Employee - One File, Multiple Employees

                         C:\NEW_HIRES_CWJ\PCG_NEW_MULTI_EMPLOYEES.CSV


           2 Employees Processed in  Final Mode

                  0 Employee(s) Pass Validation

                  2 Employee(s) Fail Validation


      **** ERRORS in the new employee import file. ****

      Correct errors in Excel file before importing again.


      Check print queue for import reports.








      Enter to Continue
 ENTER                                                                                        15.01.00
   ✓
 F16
```

Step	Action
11	**When running in TRIAL mode:** Select ![ENTER] (**Enter**) to exit the program. Review the print files and correct any errors. Proceed to *Step 13*.
	When running in FINAL mode and errors exist: Select ![ENTER] (**Enter**) to Exit Program and Correct). Review the print files and correct any errors. Proceed to *Step 13*.
	When running in FINAL mode and NO errors exist: Continue to *Step 12*.

When running in **FINAL** mode and no errors exist, the following screen displays:

```
 PCG Dist=8991  Rel=14.04.00  03/11/2015  PCW 001  SV C:\DEVSYS  C:\SECOND        WHITE              ☐☐✕
                                                                                            PAYPI150
                      Import New Employee – One File, Multiple Employees

                       C:\NEW_HIRES_CWJ\PCG_NEW_MULTI_EMPLOYEES.CSV


              2 Employees Processed in  Final Mode

                    2 Employee(s) Pass Validation

                    0 Employee(s) Fail Validation


          **** No errors in the new employee import file. ****
          Press ENTER to load the new employee data or press F16 to exit without loading data.


          Check print queue for import reports.




          Enter to Continue
  ENTER✓                                                                              15.01.00
  F16⬅
```

Step	Action
12	Select ![ENTER] (**ENTER**) to finish importing the file.
	Select ![F16] (**F16** – Exit) to stop the import process and exit the program.
	In either case, review the print files, correct any errors and review the warnings.
	*"*** Processing – Please Wait ***" briefly displays.*

The following screen displays:

Step	Action
13	**To print the report via the Uqueue Print Manager:** Select ![Uqueue icon] (**Uqueue**).
	To print the report via Microsoft® Word: Select ![Word icon] (**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.
14	Select ![F16 icon] (**F16** - Exit) to return to the *Payroll System – Special Functions Menu,* or select ![Master icon] (**Master**) to return to the *Business Applications Master Menu.*
15	**For Trial Mode:** Correct all errors that appear on the *Employee New Hire Import Error Report*, and verify the accuracy of the employee data on the *New Employee Import - Valid Employees* report before running the procedure again in Final Mode. Repeat this procedure beginning at *Steps 3 – 14* to run the procedure in Final Mode.
	For Final Mode: Verify the employee records that were added to the system by reviewing the employee data on the *Payroll Update Menu*. Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing* for the instructions on displaying and updating employee data.

B5.3. Employee New Hire Import Report (One File, Multiple Employees) - Example

```
Run date: 11/17/2022                    EMPLOYEE NEW HIRE IMPORT REPORT                              Page:    1
   PROGRAM: PAYPI150                       One File, Multiple Employees                      Run mode: FINAL MODE
   Load File Name: C:\NEW_HIRES_CWJ\PCG_NEW_MULTI_EMPLOYEES_IN_PROGRESS.CSV

      Result         Empno    SSN        Last Name          First Name      Middle Name    Emp Stat

       PASSED        077733  777-19-1212  ADKISON            SANDRA          MARIE          ACTIVE

       PASSED        077744  777-19-2323  ADKINSON           SANDY           MARIE          ACTIVE
```

The *Employee New Hire Import Report* provides a summary of the individual employee(s) processed, listing whether each employee passed or failed the edits. Review the status of each employee processed.

B5.4. New Employee Import – Detail and Errors Report - Example

```
RUN DATE: 11/17/2022                      NEW EMPLOYEE IMPORT - ALL EMPLOYEES                              PAGE:    1
PROGRAM: PAYPI150                          One File, Multiple Employees                         Run mode: FINAL MODE
Load File Name: C:\NEW_HIRES_CWJ\PCG_NEW_MULTI_EMPLOYEESERRORS.CSV

EMPLOYEE NO:  11331     SOC SEC: 111-11-8787     PAY CLASS: 04    PAY LOCATION: 1011    WORK LOCATION: 1011    JOB: 015    STATUS: A

    CERTIFICATE LEVEL:       YEARS OF STATE EXPERIENCE: 00    YEARS OF LOCAL EXPERIENCE: 00         CS1 JOB: 000

    EMPLOYEE NAME: SMITH, JOAN L                         BIRTH DATE:              MARITAL STATUS: Y    SEX: 4    EEO5 ETHNIC: 00
           STREET:                                        HIRE DATE: 11/01/1952        GHI ELIG: N              EEO5 JOB: 000
      CITY/STATE: APT 23, AT                             GHI 1ST DAY:             GHI DED CODE:            GHI PARTICIPANT:
             ZIP: ga                               GHI COVER START:              GHI OPTION: 00              GHI TIER: 00
       TELEPHONE: 123-456-7890                      HOURS PER WEEK:     0.00    SUBSTITUTE RANK:  0          BOE TRANSFER:
            CELL: 000-000-0000                               COUNTY:  000       BACKGROUND DT:          GHI EMAIL PREF:
        WRK EMAIL:
       PERS EMAIL:
    INCLUDE ON CPI? N     HISPANIC: Y    RACE CODES: ASIAN

    FED: MAR: 2  2020 W-4:     EXEMPT: 00     W/H CD: 0  AMT:    0.00  2 JOBS: 1  DEPEND:    1.00  OTHER: 50000.00  DEDUCT: 50000.00
    STATE: MAR: 1              ALLOW:  M-0 D-00  W/H CD: 3  AMT:    0.00

        PAY SCHEDULE #:  0         PAY CYCLE: 0    FEDERAL SWITCH:     STATE SWITCH: 2    FICA SWITCH: 0    RETIRE SWITCH: 2

          PENS ELIG DT:            SALARY:    40.00  CONTRACT:   10.00   STATE:    0.00  LOCAL:     9.00    OTHER:      0.00

        PENSION CODE: 0    PENSION AMT/PCT:     0.0000     CONTRACT MONTH: 00       SERVICE: 0       AEIC AMT:      0.00

       DD BANK CODE:      DD BANK ACCT:                   DD BANK TYPE:     DD METHOD:     DD AMT/%:

    ANNUITY #1: DED 01/CO 00               #2: DED 02/CO 00                #3: DED 13/CO 00
    ANNUITY #4: DED 14/CO 00               #5: DED 00/CO 00                CREDIT UNION: 00000000000000  SECTION 125: Y

    WARNING MESSAGES
    Employee Number: 011331
        The pension code is zero, no pension will be taken.


    ERRORS FOUND - Validation Failed - Review Print File
        Empno  011331 INVALID PAY CLASS
        Empno  011331 INVALID PAY LOCATION
        Line 00000 Import data value too large for field:      COUNTY
        Line 00000 Import data value too large for field:      STATE
        Line 00000 Non-numeric character in numeric field:     CELL
        Line 00000 Invalid date:                               BIRTH
        Line 00000 Invalid date:                               Background Date
        Line 00000 Non-numeric character in numeric field:     ETHNIC
        Line 00000 Import data value too large for field:      HAWAII-PAC
        Line 00000 Invalid date:                               Pens Date
        Line 00000 Non-numeric character in numeric field:     PENS CD
        Line 00000 Non-numeric character in numeric field:     TRS SRVC
        Line 00000 Non-numeric character in numeric field:     NO PENS CODE
        Line 00000 Non-numeric character in numeric field:     FED W/H CD
        Line 00000 Non-numeric character in numeric field:     FED W/H AMT
        Line 00000 Import data value too large for field:      STATE SW
        Line 00000 Import data value too large for field:      STATE MAR
        Line 00000 Non-numeric character in numeric field:     STATE W/H AMT
        Line 00000 Non-numeric character in numeric field:     ST MAR ALLOW
        Line 00000 Non-numeric character in numeric field:     STATE DEP
        Line 00000 Non-numeric character in numeric field:     STATE SAL
        Line 00000 Non-numeric character in numeric field:     OTHER SAL


    Employee Number: 011331
        Field Name          Field Value     Error
        Work Location       1011            Invalid value for field.
        Job Code            015             Invalid value for field.
        Ethnic Code         00              Invalid value for field.
```

Review the employee data and the error messages on the *New Employee Import – Detail and Errors* report. After running the batch load process in Final Mode, review the *New Employee Import – Detail and Errors* report for additional warning messages that may have occurred during the final processing.

Procedure C. Export New Hire File for Georgia Directory of New Hires

C1. Create the New Hire Export File

Complete this procedure if new hires have been added that have not been transmitted to the Georgia Directory of New Hires, or if there have been additions which must be retransmitted.

Step	Action
1	Select ⬚**13** (**F13 -** Special Functions Menu).

The following screen displays:

```
  PCG Dist=8991  Rel=14.04.00  02/09/2015  PCW 001    C:\DEVSYS  C:\SECOND        WHITE               □ ▣ ✕
                                         Payroll System                                   PAYM0013
          FKey                     Special Functions Menu
          ----
            1  -- Display/Update Pay Schedules
            2  -- Print Invalid Budget Accounts in Payroll

            3  -- Tax/Withholding/Control Menu
            4  -- Maintain/Print State File Menu
            5  -- Reset Payroll Amounts Menu
            6  -- Payroll Mass Update Menu
            7  -- Delete Employee Menu
            8  -- Payroll Export/Import Menu




                                                                                    08.03.00
  Master User
  F16  ↤  list  Word  PAY    VEND
                            MONITOR MONITOR
```

Step	Action
2	Select __8__ (**F8** - Payroll Export/Import Menu).

The following screen displays:

```
  PCG Dist=8991  Rel=14.04.00  02/09/2015  PCW 001    C:\DEVSYS  C:\SECOND        WHITE               □ ▣ ✕
                                         Payroll System                                   PAYM0016
          FKey                  Payroll Export/Import Menu
          ----
            1  -- Payroll Gross Data Export
            2  -- Payroll Gross Data Import

            3  -- Payroll Deduction Export
            4  -- Payroll Deduction Import

            5  -- Export Selected Payroll / Deduction / CPI Information
            6  -- Import Selected Payroll Information

            7  -- Earnings History Export
            8  -- Earnings History Gross Pay Distribution Export

            9  -- Import New Employees - Batch Mode
           10  -- Export New Hire File for Georgia Directory of New Hires




                                                                                    11.02.00
  Master User
  F16  ↤  list  Word  PAY    VEND
                            MONITOR MONITOR
```

Step	Action
3	Select __10__ (**F10** – Export New Hire File for Georgia Directory of New Hires).

The following screen displays:

```
  PCG Dist=8991  Rel=14.04.00  02/09/2015  PCW 001   C:\DEVSYS  C:\SECOND      WHITE

                                                                              PAYPE600

                    Create New Hire Export File for Georgia Directory of New Hires


              'X' to Select Transmission Type

                   _   - Transmit All Entries Not Previously Transmitted
                   _   - ReTransmit All Entries From this Date _____












                      Enter=Continue    or    F16=Exit
  ENTER                                                                        12.03.01

  F16
```
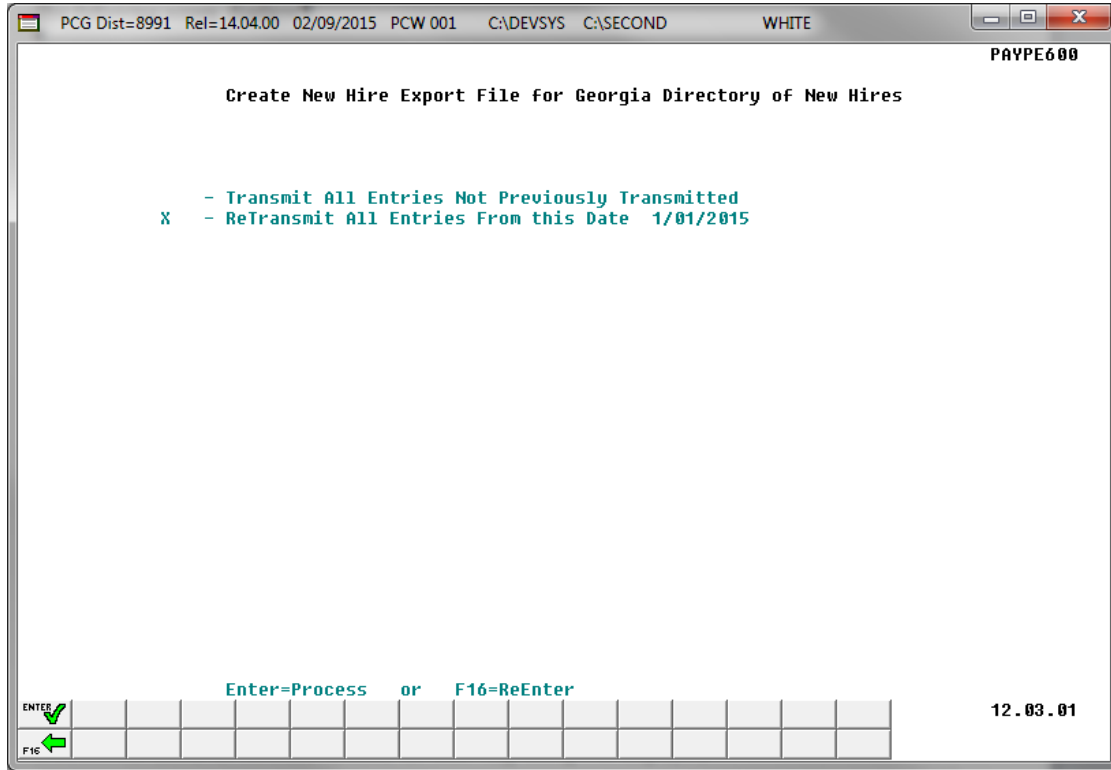
Step	Action
4	**To select all of the non-transmitted records:** Enter **X** in the **Transmit All Entries Not Previously Transmitted** field.
	To retransmit records as of a specific date: Enter **X** in the **Retransmit All Entries from this Date** field and the corresponding date (MM/DD/CCYY) in the field.
	Retransmission is based upon when the new hire record was last transmitted. For example, if an employee was hired on 04/01/2011 and the new hire file was created on 05/01/2011, a retransmission based upon 06/01/2011 will NOT extract this new hire record for inclusion in the transmission file. A retransmission based upon 04/15/2011 <u>will</u> extract this new hire record for inclusion in the transmission file.
	Also note that selecting the <u>retransmission</u> option does NOT pick up any new hire records which have not previously been transmitted. Records which have not been previously transmitted must first be transmitted using the 'Transmit ALL' option.
5	Select ![ENTER] (**Enter**).

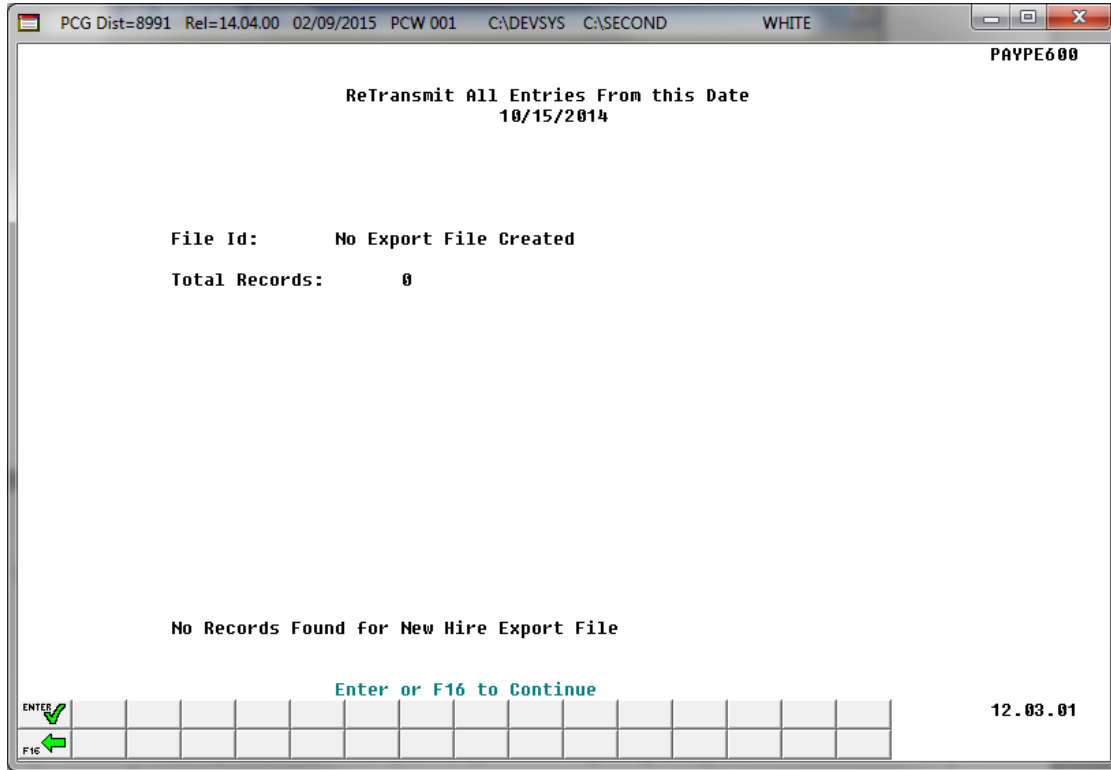The following screen displays:

Step	Action
6	Verify the run options and then select (**Enter**).

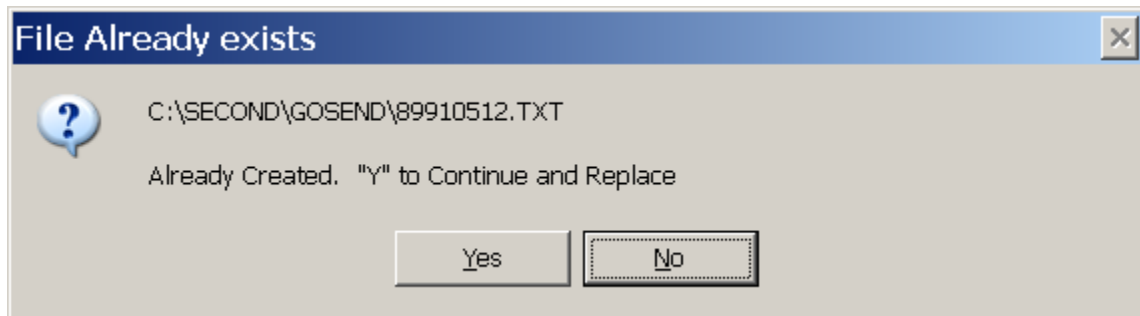If no records match the selection criteria, the following dialog box displays:

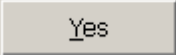If no records match the selection criteria, the following screen displays:

```
  PCG Dist=8991 Rel=14.04.00 02/09/2015 PCW 001    C:\DEVSYS  C:\SECOND         WHITE                        ▢ ▣ ✖
                                                                                              PAYPE600

                                    ReTransmit All Entries From this Date
                                                 10/15/2014




                    File Id:        No Export File Created

                    Total Records:        0

















                          No Records Found for New Hire Export File


                                    Enter or F16 to Continue
  ENTER ✓                                                                                        12.03.01
  F16 ⬅
```

Step	Action
7	If no records match the selection criteria, the "No EMPCHG Records Found for Transmission" dialog box displays. In this instance, select [OK] (**OK**), and repeat this procedure beginning at *Step* 1 using a different retransmission date. For unsuccessful file creations: Select [ENTER ✓] (**Enter**) to continue when the "No Export File Created" screen displays, and proceed to *Step* 11.

If an extract file exists with the same file name, the following dialog box displays:
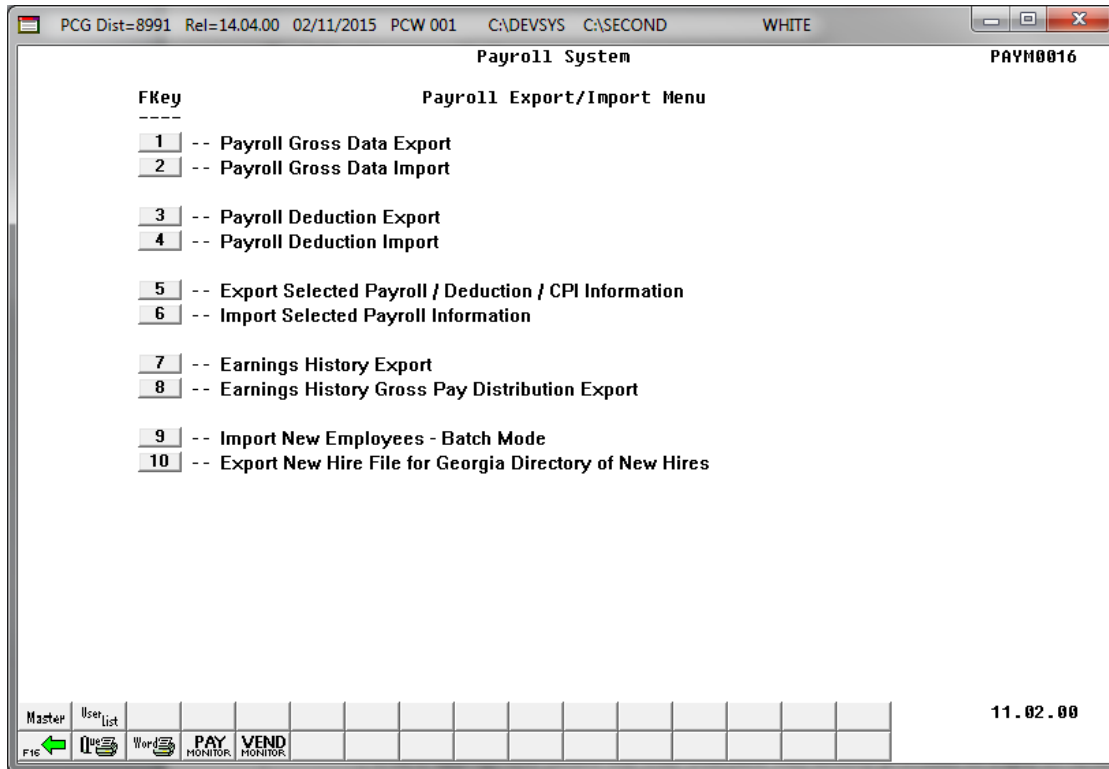
```
 File Already exists                                                           ✖

    ❓     C:\SECOND\GOSEND\89910512.TXT

           Already Created.  "Y" to Continue and Replace


                         [  Yes  ]      [   No   ]
```

Step	Action
8	If an extract file exists with the same file name, the "File Already Exists" dialog box displays. To write over the existing transmission file, select [Yes] (**Yes**). To cancel processing, select [No] (**No**), then rename the existing transmission file with a different name, and repeat this procedure beginning at *Step* 1.

The following screen displays:

```
  PCG Dist=8991  Rel=14.04.00  02/11/2015  PCW 001    C:\DEVSYS   C:\SECOND         WHITE                    □ ▣ ✕
                                                                                                      PAYPE600

                           Transmit All Entries Not Previously Transmitted




                  File Id:        C:\SECOND\GOSEND\91000211.TXT

                  Total Records:       51













                  New Hire Export File Completed Successfully

                  Review Print File for Details
                             Enter or F16 to Continue
  ENTER                                                                                               12.03.01

  F16
```

Step	Action
9	Screen-print the *Successful Completion* screen, and select [ENTER ✓] (**Enter**) to continue. *Screenshot examples are for display purposes only. The location of PCGenesis files is "K:\SECOND\GOSEND". Note also that filenames and record totals are school-district and system-specific.* *Use this filename to transmit the file to the Georgia New Hire Reporting Program. Use the "Total Records" field's entry to compare to the New Hire Export Report's results.* *PCGenesis also displays a records counter along with the Successful Completion screen.*

The following screen displays:

Step	Action
10	**To print the report via the Uqueue Print Manager:** Select ![Uqueue icon] (**Uqueue**).
	To print the report via Microsoft® Word: Select ![Word icon] (**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.
11	Select ![F16 icon] (**F16** - Exit) <u>twice</u> to return to the *Payroll System Master Menu,* or select ![Master icon] (**Master**) to return to the *Business Applications Master Menu.*
12	Compare the report's results to the results of the screenshot example preceding *Step 9.*

C1.1. New Hire Export File for Georgia Directory of New Hires Report - Example

```
Date:      05/12/2011 10:37          New Hire Export File for Georgia Directory of New Hires        Page   1
Program:   PAYPE600

Empno  Name                        SSN        Birth Date  Hire Date

98765  DONAVAN, MARY L.            987654321  01/01/1960  08/01/2011
76543  BAKER, MARY LOUISE          987546122  01/01/1960  07/01/2011
65432  BAKER, MARY LOUISE          987654333  01/01/1960  01/01/2011
54321  MAYNARD, ELIZABETH M.       444556666  01/01/1960  09/30/2011
76576  TEST, MARY L.               888997777  01/01/1959  01/01/2011
65433  TEST, MARY LOUISE           987654322  01/01/1960  01/01/2011

       Total Employees        6
```

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

Refer to the *Payroll System Operations Guide, Section B: Payroll Update Processing, Topic 2: Add a New Payroll Employee and Hire a New Third Party Contractor Employee, Appendix A: Formatting the PCG_New_One_Employee.csv File (Multiple Files, One Employee Per File)* for instructions on using the *PCG_New_One_Employee.xlsx* template and creating the comma-delimited (.csv) import files.

Appendix B: Formatting the PCG_New_Multi_Employees.csv File (One File, Multiple Employees)

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

Note: *The PCG New Hire Multiple Import template is version **10.00**.*

	PCG_New_Multi_Employees.csv File Format Requirements	
1	When creating the .csv file, the ***New Employee** Entry/Import* procedure only processes lines containing the character **C** within *Column A*. Leave *Column A* blank to include *Comments* and/or *Headings* in the *.csv* file.	
2	The *header fields* must meet the following specifications:	
	2.1	Must contain a *C* in *Column A*.
	2.2	*Column B* must contain a line number.
	2.3	*Column C* must contain up to five (5) digits representing the **employee number**.
	2.4	*Column D* must contain up to one (1) alphanumeric character representing the employee **status**.
	2.5	*Column E* must contain the employee's **social security number** in either of the following two formats: • Eleven (11) alphanumeric characters representing the employee's social security number in the format ###-##-#### (with dashes). • Nine (9) digits representing the social security number in the format ######### (without dashes).
	2.6	*Column F* must contain up to fifteen (15) alphanumeric characters representing the employee's **first name**.
	2.7	*Column G* must contain up to fifteen (15) alphanumeric characters representing the employee's **middle name or initial**.
	2.8	*Column H* must contain up to twenty (20) alphanumeric characters representing the employee's **last name.**
3	*Columns I* thru *AJ* meet the following specifications:	
	3.1	*Column I* must contain up to six (6) alphanumeric characters representing the employee's **name prefix**.
	3.2	*Column J* must contain up to six (6) alphanumeric characters representing the employee's **name suffix**.
	3.3	*Column K* must contain up to four (4) digits representing the **pay location code**.
	3.4	*Column L* must contain up to four (4) digits representing the **work location code**.
	3.5	*Column M* must contain up to two (2) digits representing the employee **class code**.
	3.6	*Column N* must contain up to three (3) digits representing the **job code**.
	3.7	*Column O* must contain up to three (3) digits representing the **CS1 job code (from CPI)**.

PCG_New_Multi_Employees.csv File Format Requirements	
3.8	*Column P* must contain up to thirty (30) alphanumeric characters representing the employee's **address line 1**.
3.9	*Column Q* must contain up to thirty (30) alphanumeric characters representing the employee's **address line 2**.
3.10	*Column R* must contain up to twenty-six (26) alphanumeric characters representing the employee's **address city**.
3.11	*Column S* must contain up to two (2) alphanumeric characters representing the employee's **address state abbreviation code**.
3.12	*Column T* must contain up to ten (10) alphanumeric characters representing the employee's **address zip code**.
3.13	*Column U* must contain up to ten (3) digits representing the employee's **Georgia county code**.
3.14	*Column V* must contain up to ten (10) digits representing the employee's **phone number**.
3.15	*Column W* must contain up to ten (10) digits representing the employee's **cell phone number**.
3.16	*Column X* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **hire date**.
3.17	*Column Y* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **birth date**.
3.18	*Column Z* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **background check date**.
3.19	*Column AA* must contain up to one (1) alphanumeric character representing the employee's **gender**.
3.20	*Column AB* must contain up to one (1) alphanumeric character representing the employee's **marital status**.
3.21	*Column AC* must contain three (3) characters representing the **EEO-5 job code**.
3.22	*Column AD* must contain up to two (2) digits representing the **Ethnic code**.
3.23	*Column AE* must contain up to one (1) alphanumeric character representing the employee's **Include in CPI? code.**
3.24	*Column AF* must contain up to one (1) alphanumeric character representing the employee's **Hispanic race code**.
4	At least one race code must be selected. The *race codes* must meet the following specifications:
4.1	*Column AG, AH, AI, AJ, and AK* must contain up to one (1) alphanumeric character representing the employee's **American Indian, Black, White, Asian, and Pacific Islander race codes** respectively. Valid values are **Y** or **N**.

		PCG_New_Multi_Employees.csv File Format Requirements
5		The *pension fields* must meet the following specifications:
	5.1	*Column AL* must contain up to one (1) alphanumeric character representing the **pension switch**.
	5.2	*Column AM* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **pension eligible date**.
	5.3	*Column AN* must contain up to one (1) digit representing the **pension code**.
	5.4	*Column AO* must contain up to one (1) digit representing the **TRS service indicator code**.
	5.5	*Column AP* must contain up to two (2) digits representing the **'No pension' code**.
6		The *Federal fields* must meet the following specifications:
	6.1	*Column AQ* must contain up to one (1) alphanumeric character representing the **FICA switch**.
	6.2	*Column AR* must contain up to one (1) alphanumeric character representing the **Federal switch**.
	6.3	*Column AS* must contain up to one (1) alphanumeric character representing the employee's **Federal marital filing status**.
	6.4	*Column AT* must contain up to one (1) digit representing the **Federal withholding code**.
	6.5	*Column AU* must contain up to six (6) digits with two (2) decimal digits representing the **Federal additional withholding amount/percent**. The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as **-**123456.12
	6.6	*Column AV* must contain up to two (2) digits representing the **number of Federal exemptions**.
	6.7	*Column AW* must contain the appropriate response in the **2020 W-4?** field. Valid Values: **Y** = Employee's W-4 form is from 2020 or later **N** = Employee's W-4 form is from prior to 2020
	6.8	**Federal 2020 W-4: Two jobs flag** in *Column AX*. If the **2020 W-4?** field value is '**Y**', enter '**Y**' if the employee has checked the *Step 2* checkbox on the 2020 W-4 form to indicate that there are a total of two jobs in the household. Valid Values: **Y** = *Step 2* checkbox is checked on the 2020 W-4 **N** = *Step 2* checkbox is <u>not</u> checked on the 2020 W-4 *This field is valid for a W-4 filed in year 2020 or later.*
	6.9	**Federal 2020 W-4: Depend amount** (dependent amount) in *Column AY*. If the **2020 W-4?** field value is '**Y**', enter the amount from *Step 3* of the 2020 W-4 form as the amount claimed for dependents. *This field is valid for a W-4 filed in year 2020 or later.*

PCG_New_Multi_Employees.csv File Format Requirements		
	6.10	**Federal 2020 W-4: Other income** in *Column AZ*. If the **2020 W-4?** field value is '**Y**', enter the amount from *Step 4a* of the 2020 W-4 form as the amount claimed for other income. *This field is valid for a W-4 filed in year 2020 or later.*
	6.11	**Federal 2020 W-4: Deduct amount** (deduction amount) in *Column BA*. If the **2020 W-4?** field value is '**Y**', enter the amount from *Step 4b* of the 2020 W-4 form as the amount claimed for deductions. *This field is valid for a W-4 filed in year 2020 or later.*
7	The *State fields* must meet the following specifications:	
	7.1	*Column BB* must contain up to one (1) alphanumeric character representing the **State switch**.
	7.2	*Column BC* must contain up to one (1) alphanumeric character representing the employee's **State marital filing status**.
	7.3	*Column BD* must contain up to one (1) digit representing the **State withholding code**.
	7.4	*Column BE* must contain up to six (6) digits with two (2) decimal digits representing the **State additional withholding amount/percent**. The amount may contain a sign so that either positive or negative amounts may be entered. For example, the amount may be entered as **-**123456.12
	7.5	*Column BF* must contain up to two (2) digits representing the **number of State marital allowances**.
	7.6	*Column BG* must contain up to two (2) digits representing the **number of State dependent allowances**.
8	The *Salary fields* must meet the following specifications:	
	8.1	*Column BH* must contain up to six (8) digits with two (2) decimal digits representing the **State salary**. For example, the amount may be entered as 12345678.12
	8.2	*Column BI* must contain up to six (8) digits with two (2) decimal digits representing the **Local salary**. For example, the amount may be entered as 12345678.12
	8.3	*Column BJ* must contain up to six (8) digits with two (2) decimal digits representing the **Other salary**. For example, the amount may be entered as 12345678.12
	8.4	*Column BK* must contain up to six (8) digits with two (2) decimal digits representing the **contract amount**. For example, the amount may be entered as 12345678.12
	8.5	*Column BL* must contain up to six (8) digits with two (2) decimal digits representing the **cycle gross**. For example, the amount may be entered as 12345678.12

		PCG_New_Multi_Employees.csv File Format Requirements
	8.6	*Column BM* must contain up to two (2) digits representing the **number of contract months**.
	8.7	*Column BN* must contain up to two (2) digits representing the **number of contract months for the prior year**.
	8.8	*Column BO* must contain up to one (1) digit representing the **cycle code**.
9		The *State Health fields* must meet the following specifications:
	9.1	*Column BP* must contain up to one (1) alphanumeric character representing the employee's **GHI eligible status**. Valid values are Yes (**Y**) and No (**N**).
	9.2	*Column BQ* must contain up to one (1) alphanumeric character representing the employee's **GHI participation switch**. Valid values are Yes (**Y**) and No (**N**).
	9.3	*Column BR* must contain up to one (1) alphanumeric character representing the employee's **BOE transfer switch**. Valid values are Yes (**Y**), No (**N**), and 'Don't know' (**D**).
	9.4	*Column BS* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **GHI 1st Day Worked**.
	9.5	*Column BT* must contain up to ten (10) characters in MM/DD/CCYY format representing the employee's **GHI Coverage Start Date**.
	9.6	*Column BU* must contain up to two (2) digits representing the **GHI deduction code**.
	9.7	*Column BV* must contain up to two (2) digits representing the **GHI option code**.
	9.8	*Column BW* must contain up to two (2) digits representing the **GHI tier code**.
	9.9	*Column BX* must contain up to three (3) digits with two (2) decimal digits representing the **hours worked per week**. The amount must be positive. For example, the amount may be entered as 123.12
	9.10	*Column BY* must contain one (1) alphanumeric character representing the employee's **GHI E-mail Preference**. Valid values are '**P**' to send the personal e-mail address to SHBP and '**W**' to send the work e-mail address to SHBP.
10		The *Leave fields* must meet the following specifications:
	10.1	*Column BZ* must contain one (1) alphanumeric character representing the employee's **Sick Bank** participation.
	10.2	*Column CA* must contain one (1) numeric character representing the employee's **substitute rank**.
	10.3	*Column CB* must contain up to two (2) digits with three (3) decimal digits representing the **hours worked per day**. The amount must be positive. For example, the amount may be entered as 12.123

PCG_New_Multi_Employees.csv File Format Requirements		
11	The *Miscellaneous fields* must meet the following specifications:	
	11.1	*Column CC* must contain up to fifty (50) alphanumeric characters representing the employee's **Work E-mail Address**. The e-mail address must contain one '@' sign.
	11.2	*Column CD* must contain up to fifty (50) alphanumeric characters representing the employee's **Personal E-mail Address**. The e-mail address must contain one '@' sign.