

PCGENESIS PAYROLL SYSTEM OPERATIONS GUIDE

10/2/2008

Section I: Special Functions

*[Topic 7: Delete Employee Processing,
V2.1]*

Revision History

Date	Version	Description	Author
10/2/2008	2.1	08.03.00 – Updated screenshot examples, <i>Special Functions Menu</i> reorganization.	C. W. Jones
7/7/2008	2.0	08.02.00 – Added updated <i>Select Employee</i> screen information and instructions.	C. W. Jones

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Overview

Employee record deletion includes the following procedures:



- Creating a listing of employee records without earnings history information to determine if the records require removal from PCGenesis. Refer to *B1. Employees with No Earnings History Report – Example* for an example of this report.

This procedure will not remove employees' information if the Include on CPI? flag has been set to Y (Yes). The Earnings History Report will identify the records of this type. Refer to Section B: Payroll Update, Topic 3: Update/Display Personnel Information for the instructions to reset the Include on CPI? flag.

- Deleting specific employee's records and generating a listing of the records deleted. Refer to *C1. Employees with No Earnings History/Removed from Payroll File – Example* for an example of this report.

The following guidelines apply to deleting employee information:

- PCGenesis does not allow the deletion of employee records with earnings history information until the user removes the information from the PCGenesis *HISTORY* file.
- *Inactivating* an employee's record allows the clearing of all gross salary information, and prevents payroll processing for the employee. For example, when an employee is on leave without pay, or when an employee will not receive pay during a specific time frame, the record should be *inactivated*. For the employee to be included in payroll processing at a later point in time, reactivate the employee's record, that is, the PCGenesis user must reverse the *inactivation*. (On the other hand, when deleting the employee's record, re-enter all of the employee's payroll information.

Selecting  (F15 – Description Code Lookup) and  (F28 - Help Screens) when offered provides additional assistance with the entry of information.

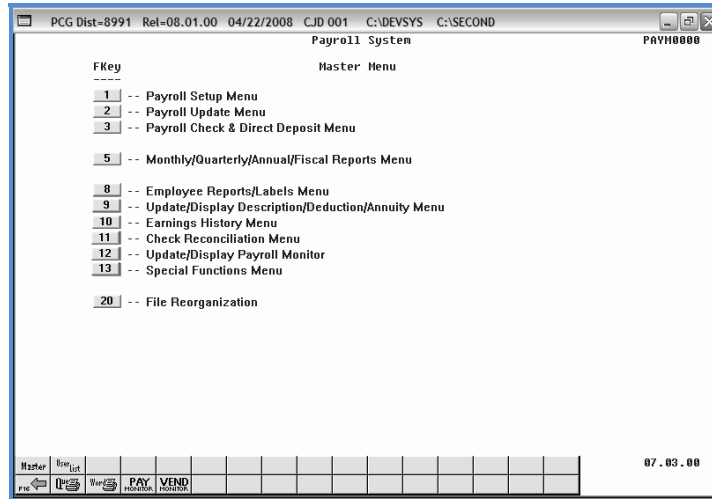
Procedure A: Setting/Clearing Employee Search Criteria

Refer to *Topic 1: Set/Clear Employee Search Criteria* for instructions.

Procedure B: Printing the Employees without Earnings History Report

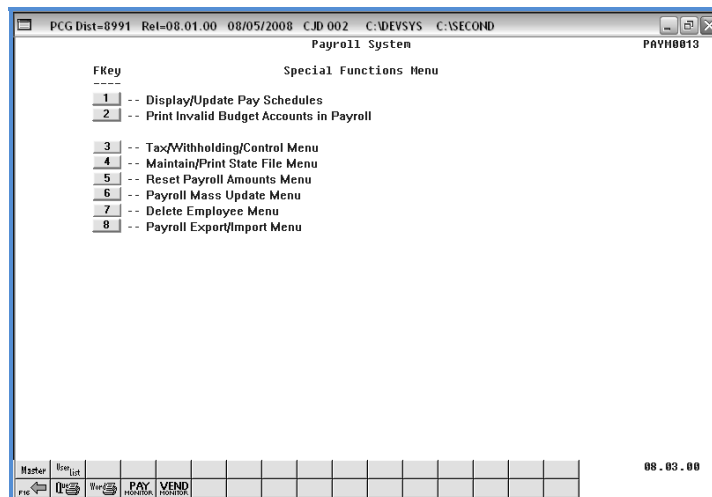
Step	Action
1	From the <i>Business Applications Master Menu</i> , select 2 (F2 - Payroll System).

The following screen displays:



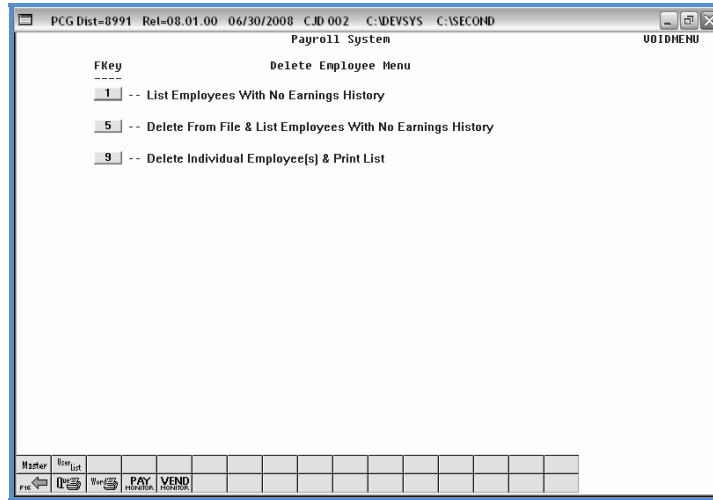
Step	Action
1	Select 13 (F13 - Special Functions Menu).

The following screen displays:



Step	Action
2	Select 7 (F7 – Delete Employee Menu).

The following screen displays:



Step	Action
2	Select (F1 - List Employees with no Earnings History). <i>“Processing Request “briefly displays. The Payroll System – Delete Employee Menu redisplay.</i>
3	To print the report via the Uqueue Print Manager: Select (Uqueue). To print the report via Microsoft® Word: Select (MS WORD). <i>Follow the User Interface instructions provided in Topic 1: Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing to create the macro necessary to use the feature where appropriate.</i>
4	Select (F16 - Exit) to return to the <i>Payroll System - Special Functions Menu</i> , or select (Master) to return to the <i>Business Applications Master Menu</i> .

B1. Employees with No Earnings History Report – Example

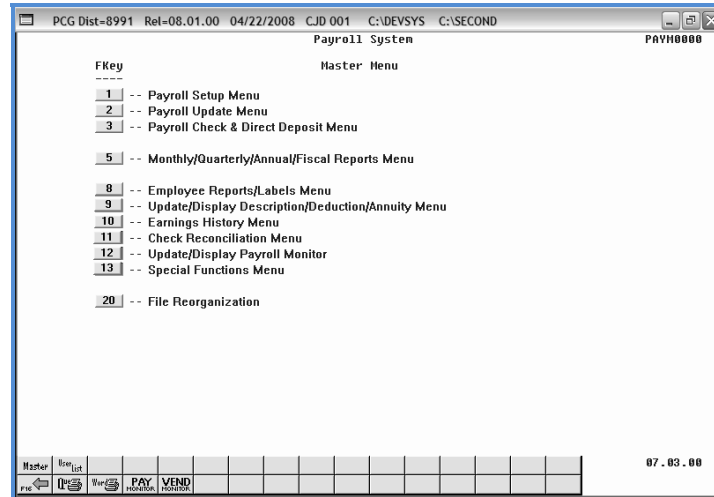
This procedure will not remove employees' information if the Include on CPI? flag has been set to Y (Yes). The Earnings History Report will identify the records of this type. Refer to Section B: Payroll Update, Topic 3: Update/Display Personnel Information for the instructions to reset the Include on CPI? flag.

-----Page Break-----									
REPORT DATE: 07/01/2008		EMPLOYEES WITH NO EARNINGS HISTORY					PAGE 1		
EMPHO	EMPLOYEE NAME	STATUS	SOC SEC NO	LOC	CLASS	TERM DATE	TERM CODE	CPI FLAG	
00501	ADDEMIROING, ALYSSA	A	999-08-9368	0192	04			II	
89063	HASEIIS, JUSKO	I	999-08-9063	0202	04			Y	
36972	KNONITALL, GADOE TEACHER	A	888-99-0000	0192	04			Y	
89795	LOGMIS, TEGESIA	T	999-08-9795	0192	11	06/01/05	9	II	
89253	MA3K, MA3SIE	A	999-08-9253	0192	02			Y	
00009	TEST, TEST	A	000-00-0009	0192	06			Y	
85214	TEST, TEST	A	852-14-0000	0192	04			Y	
12890	TEST, TEST TEST	A	987-65-4321	0192	04			Y	
89822	WH3TLOCK, AL3SSANDRA	I	999-08-9822	0192	04			Y	

The final page of the report list overall employee totals.

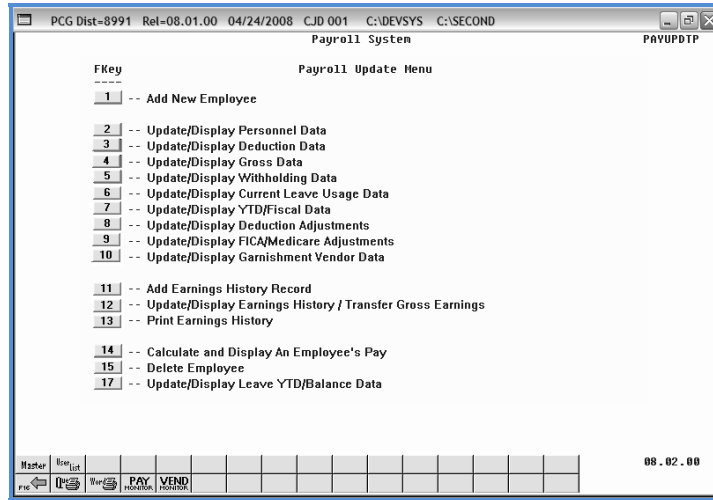
*** TOTAL EMPLOYEES WITH NO EARNINGS	9 ***
INCLUDE ON CPI FLAG MUST BE II IN ORDER TO DELETE THE EMPLOYEE	

Procedure C: Deleting Individual Employee Information

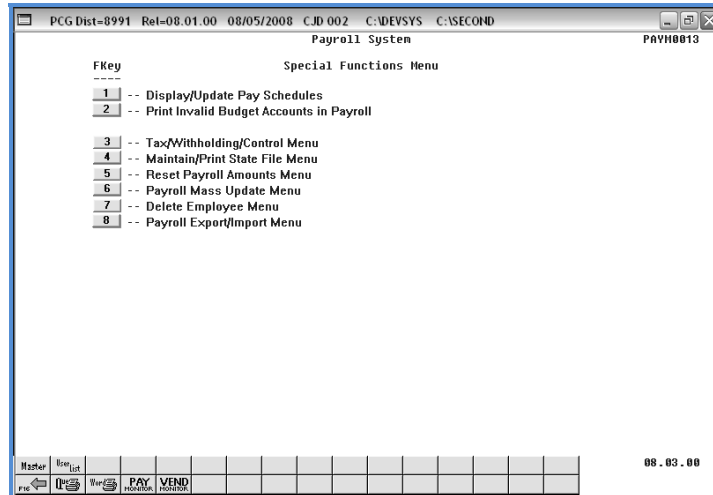


Step	Action
1	<p>Payroll Update Menu: Select 2 (F2 - Payroll Update Menu) and proceed to <i>Step 2</i>.</p> <p>Special Functions Menu: Select 13 (F13 - Special Functions Menu) and proceed to <i>Step 3</i>.</p>

For **Step 1-F2** selections, the following screen displays:

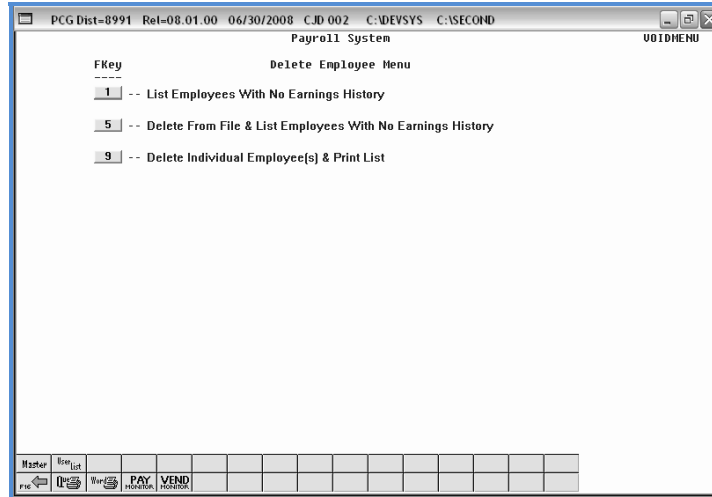


For **Step1-F13** selections, the following screen displays:



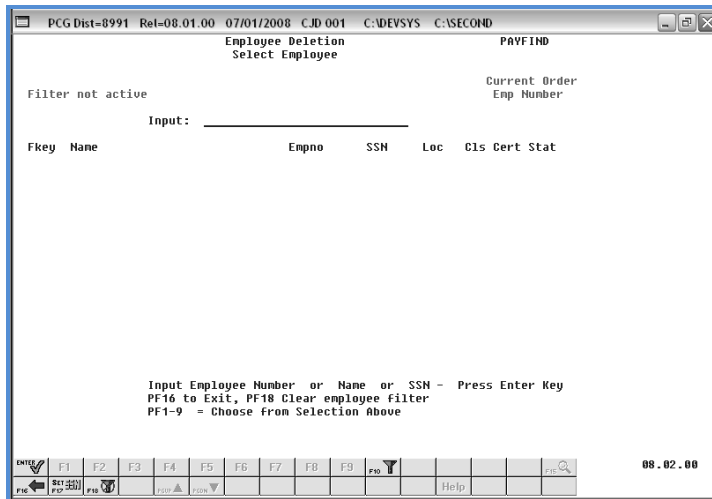
Step	Action
3	<p>For Step 1-F2 selections: Select 15 (F15 - Delete Employee), and proceed to Step 5.</p> <p>For Step 1-F13 selections: Select 7 (F7 – Delete Employee Menu), and proceed to Step 4.</p>

For **Step 1-F13** selections, the following screen displays:



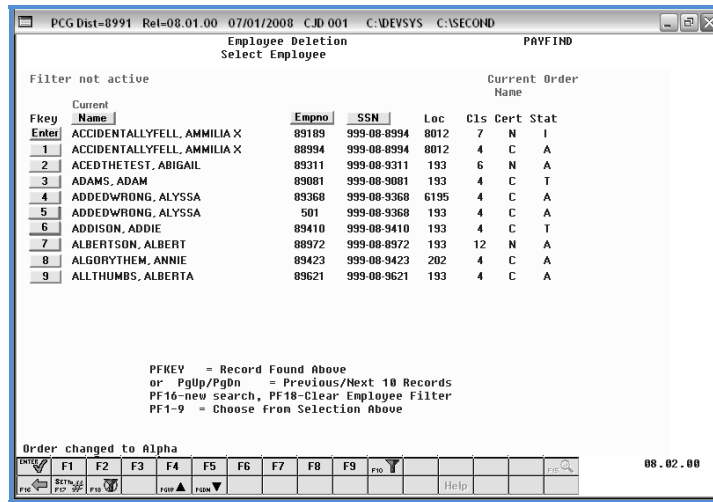
Step	Action
4	Select 9 (F9 - Delete Individual Employee(s) & Print List)).




The following screen displays:



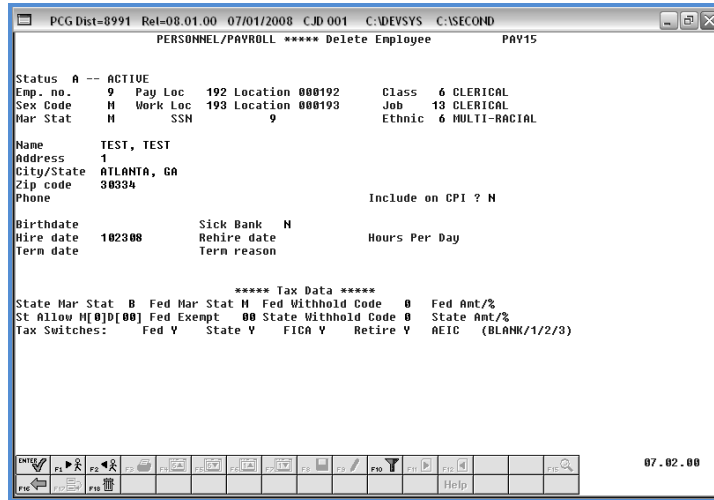
Step	Action
5	Enter the number in the Input field, select Enter , and proceed to <i>Step 6</i> . <i>If the employee number is unknown, enter the employee's complete or partial name in the Name field, or Social Security Number in the field, and select Enter. Entering a complete or partial name in the Name field displays the results most closely matching the search criteria entered. Select Enter or the Function key corresponding to the employee's record.</i>


The following screen displays:



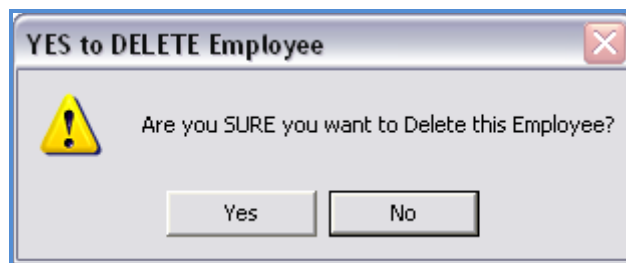
Step	Action
6	<p>Select Enter (Enter) or select the Function key corresponding to the employee's record, and select  (Enter).</p> <p>To sort by Name: Select Name (Name).</p> <p>To sort by Employee Number: Select Empno (Empno).</p> <p>To sort by Social Security Number: Select SSN (SSN).</p> <p>To scroll between pages: Select the PgUp/PgDn keys on the computer's keyboard or select either  (Page Up) or  (Page Down).</p>

The following screen displays



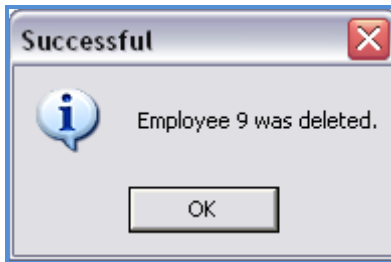
Step	Action
7	<p>Select  (F18 – Delete Employee).</p> <p><i>If the employee’s Include on CPI? flag has been set to Y (Yes), the “Employee Has Include on CPI Set to Y *** Cannot be Deleted” message displays at the bottom of the screen. In this instance, reset the employee’s Include on CPI? flag to N (No). Refer to the Overview for additional information.</i></p> <p><i>If the employee’s record contains earnings history information, the “Employee Has Earnings History Records *** Cannot be Deleted” message displays at the bottom of the screen. In this instance, contact the Technology Management Customer Support Center for assistance.</i></p>


The following dialog box displays:



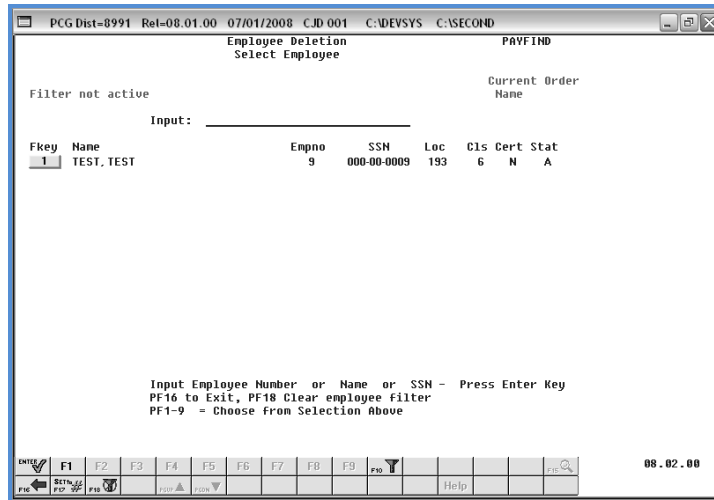
Step	Action
8	<p>Select  (Yes).</p>




The following dialog box displays:



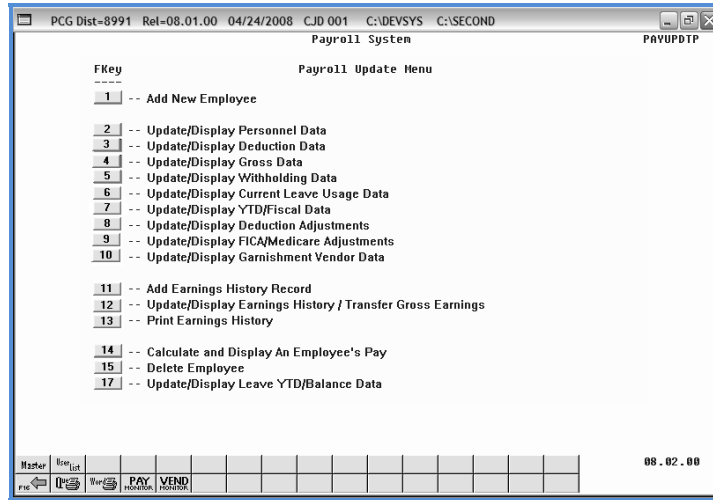
Step	Action
9	Select  (OK).

The following screen displays:

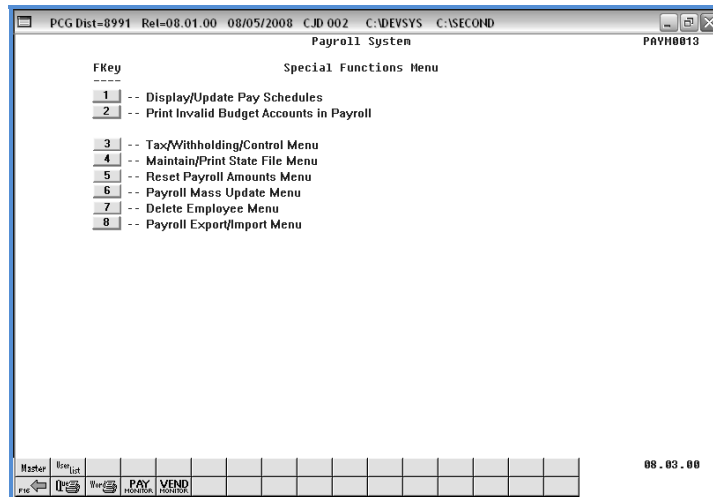






Step	Action
10	<p>Payroll System – Payroll Update Menu: Select  (F16 – Exit) to return to the <i>Payroll System - Payroll Update Menu</i>.</p> <p>Special Functions Menu: Select  (F16 – Exit) to return to the <i>Payroll System – Payroll Delete Employee Menu</i>, and select  (F16 – Exit) to return to the <i>Payroll System Special Functions Menu</i>.</p>

For **Step1-F2** selections, the following screen displays:



For **Step 1-F13** selections, the following screen displays:

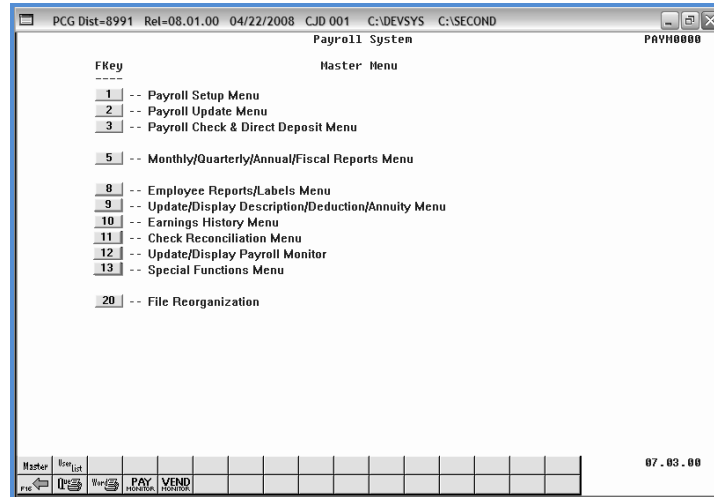


Step	Action
11	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p><i>Follow the User Interface instructions provided in Topic 1: Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing to create the macro necessary to use the feature where appropriate.</i></p>
12	<p>Select  (F16 - Exit) to return to the <i>Payroll System Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>

C1. Individual Employee Records with No Earnings History/Removed from Payroll Master File Report – Example

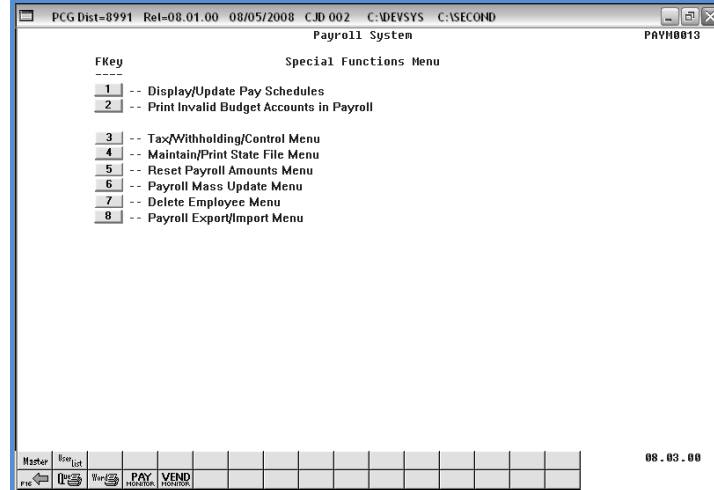
=====Page Break=====					
REPORT DATE: 07/01/2008	EMPLOYEES WITH NO EARNINGS HISTORY				PAGE 1
** REMOVED FROM PAYROLL MASTER FILE **					
EMPHO	EMPLOYEE NAME	STATUS	SOC SEC NO	LOC	CLASS
00009	TEST, TEST	A	000-00-0009	92	06
	1				
	ATLANTA, GA	30334			
*** TOTAL EMPLOYEES DELETED FROM FILE		1	***		
End of File					

Procedure D: Delete from file and List Employees Records without Earnings History Information



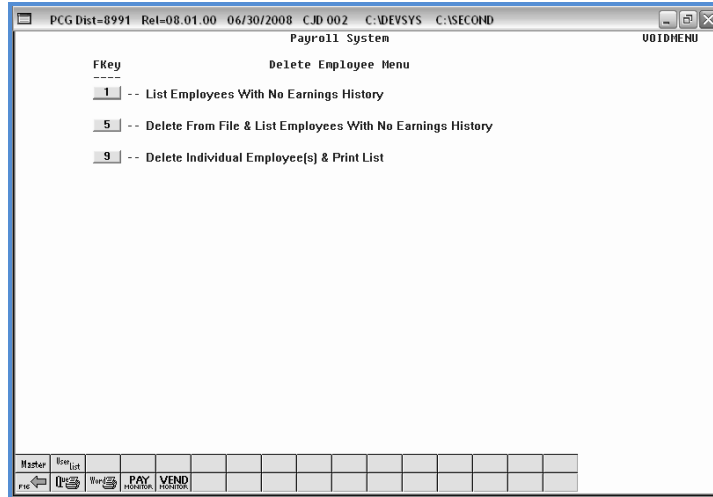
Step	Action
1	Select 13 (F13 - Special Functions Menu).

The following screen displays:



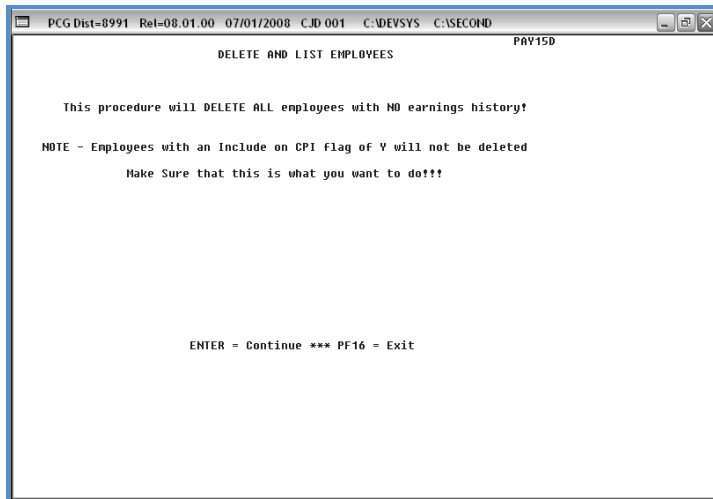
Step	Action
2	Select 7 (F7 – Delete Employee Menu).

The following screen displays:



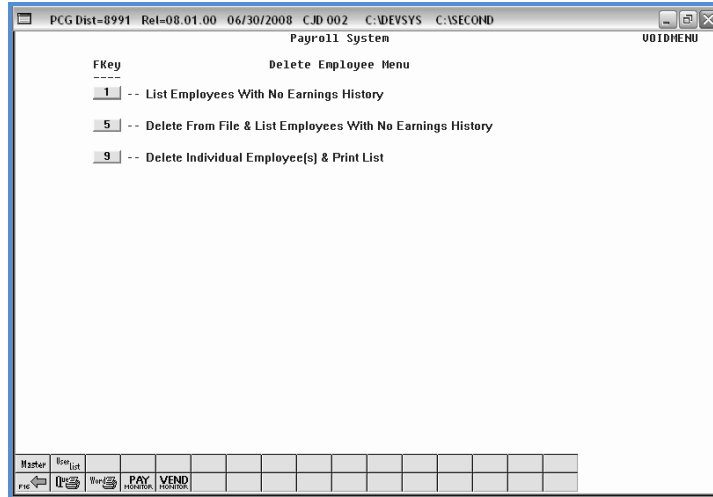
Step	Action
3	Select 5 (F5 - Delete from File & List Employees with No Earnings History).





The following screen displays:



Step	Action
4	Review the information on the <i>Delete Employee Records without Earnings History from the Payroll Master File Warning</i> screen, and select Enter (Continue). “Processing Request” briefly displays.

The following screen displays:



Step	Action
5	<p>To print the report via the Uqueue Print Manager: Select  (Uqueue).</p> <p>To print the report via Microsoft® Word: Select  (MS WORD).</p> <p><i>Follow the User Interface instructions provided in Topic 1: Creating the Microsoft®-PCGenesis QWORD Macro for Report Printing to create the macro necessary to use the feature where appropriate.</i></p>
6	<p>Select  (F16 - Exit) to return to the <i>Payroll System Master Menu</i>, or select  (Master) to return to the <i>Business Applications Master Menu</i>.</p>

D1. Multiple Employee Records with No Earnings History/Removed from Payroll Master File Report – Example

=====Page Break=====						
REPORT DATE:	EMPLOYEES WITH NO EARNINGS HISTORY				PAGE 1	
** REMOVED FROM PAYROLL MASTER FILE **						
EMPHO	EMPLOYEE NAME	STATUS	SOC SEC NO	LOC	CLASS	
00501	ADDEDWONG, ALYSSA JKL KFSLFJ, GA	A	999-08-9368	0192	04 35416	
89795	LOGHIS, TEGESIA 1205 MAIN STREET SMITH, GA	T	999-08-9795	0192	11 33333	
*** TOTAL EMPLOYEES DELETED FROM FILE 2 ***						