Munis Human Resources and Payroll

Major Enhancements
Version 9.3 to 10.5
June 4, 2014

For more information, visit www.tylertech.com.

TABLE OF CONTENTS

Human Resources and Payroll V10.3

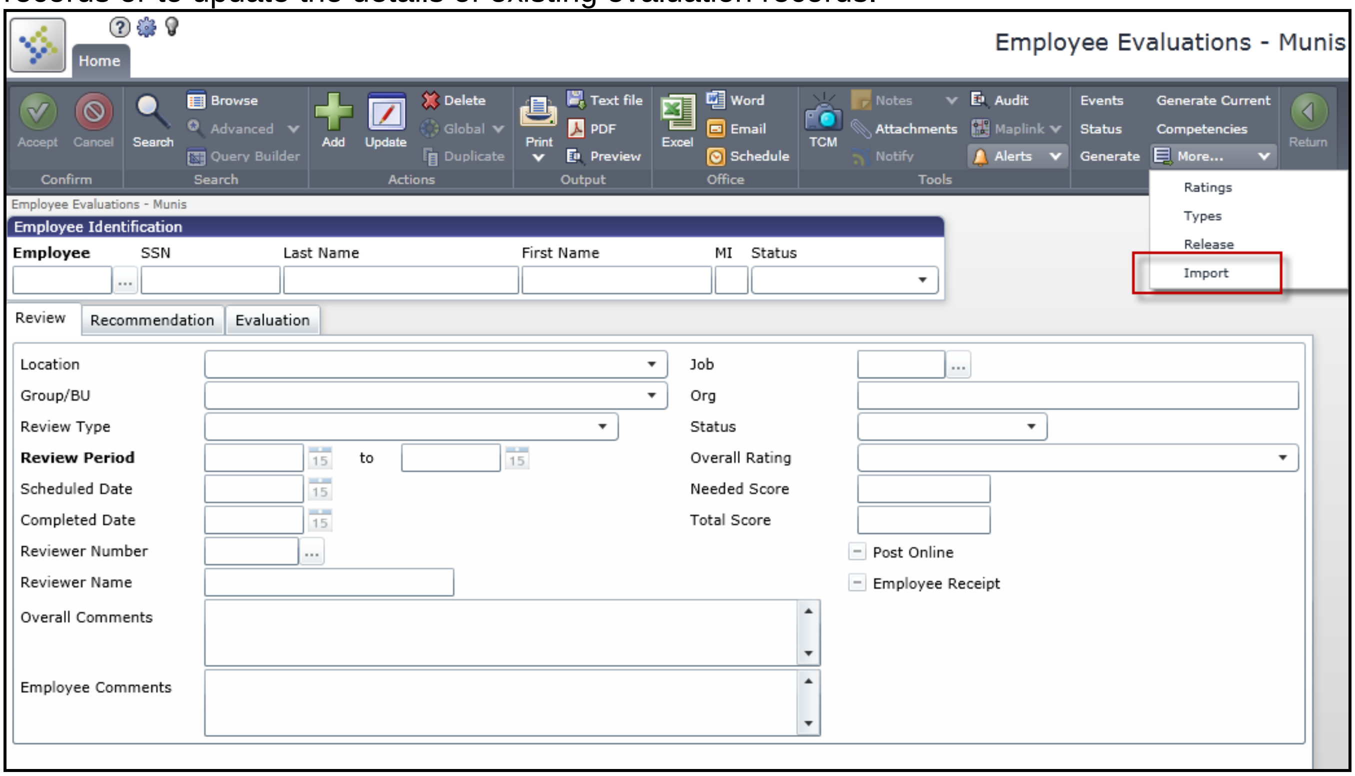
This document provides an overview of the major HR/Payroll enhancements for Munis Version 10.3. The Munis Human Resources and Payroll product includes Employee Self Service (ESS).

Human Resources

The following changes apply to Munis Human Resources programs.

Employee Evaluations

The Import option in the Employee Evaluations program enables you to import new evaluation records or to update the details of existing evaluation records.



The fields imported by this function are determined by a customizable import form definition.

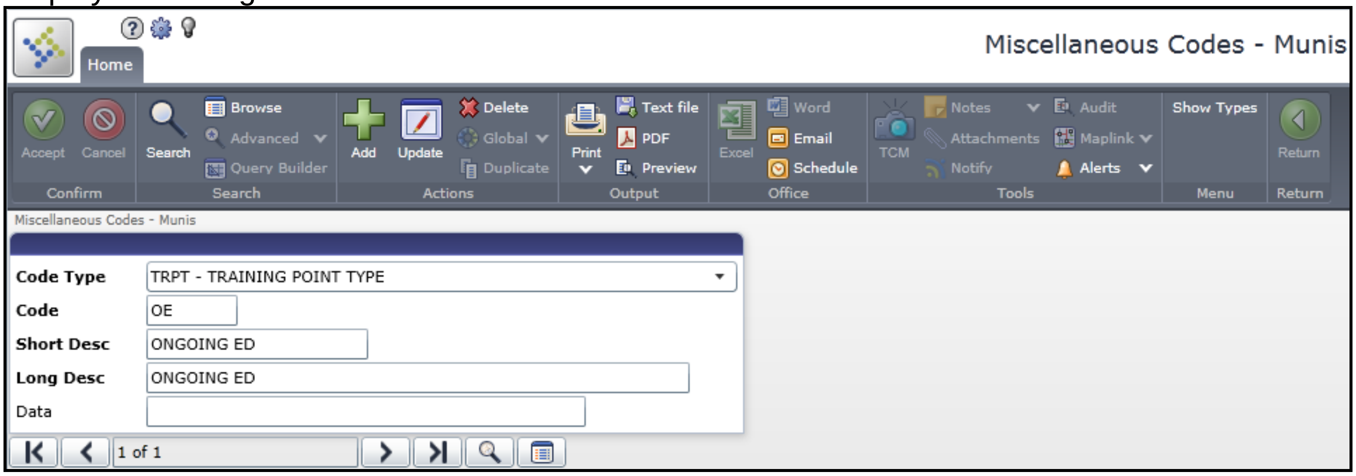
Employee Training

The Employee Training programs have been expanded to include a points system for tracking employee training and functionality to accommodate guest training.

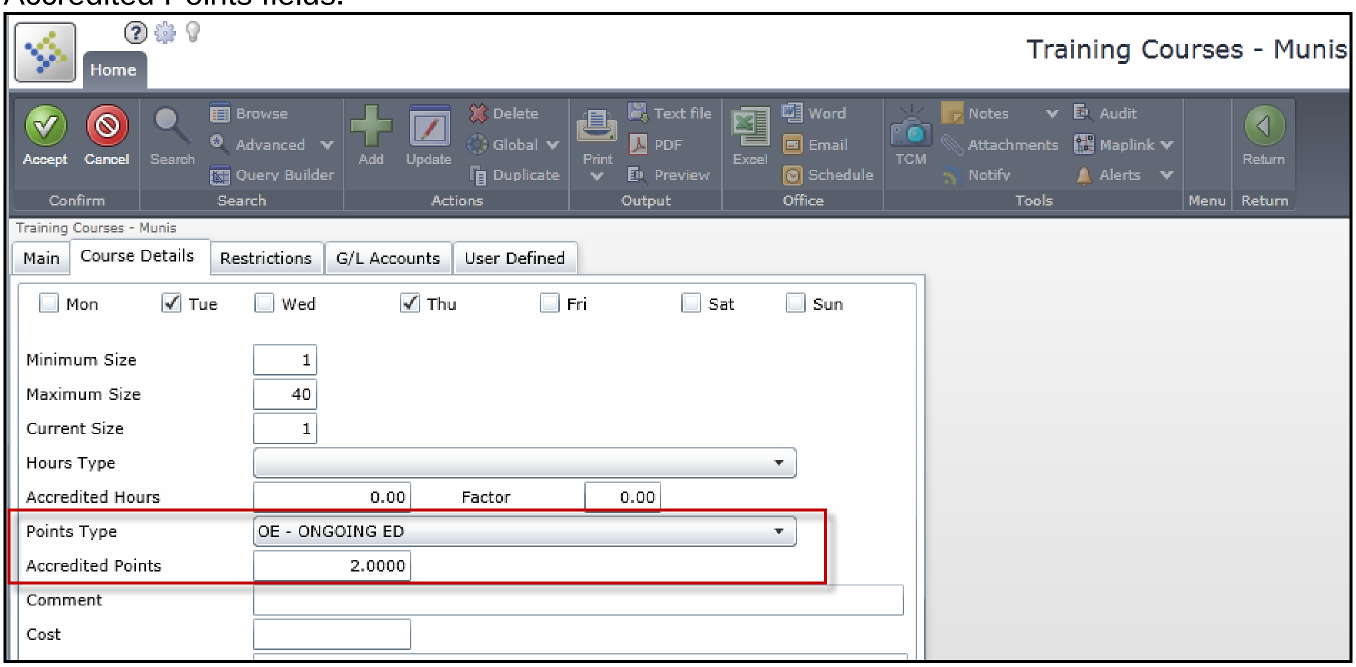
Training Points

The training-points functionality tracks employee training by a points system. This functionality can be used, for example, to track employee progress toward qualifying for re-certification as well as to grant that re-certification.

The training-points functionality includes the Training Point Type code in the Payroll Miscellaneous Codes program, which you can use to define types of points to use for tracking employee training.

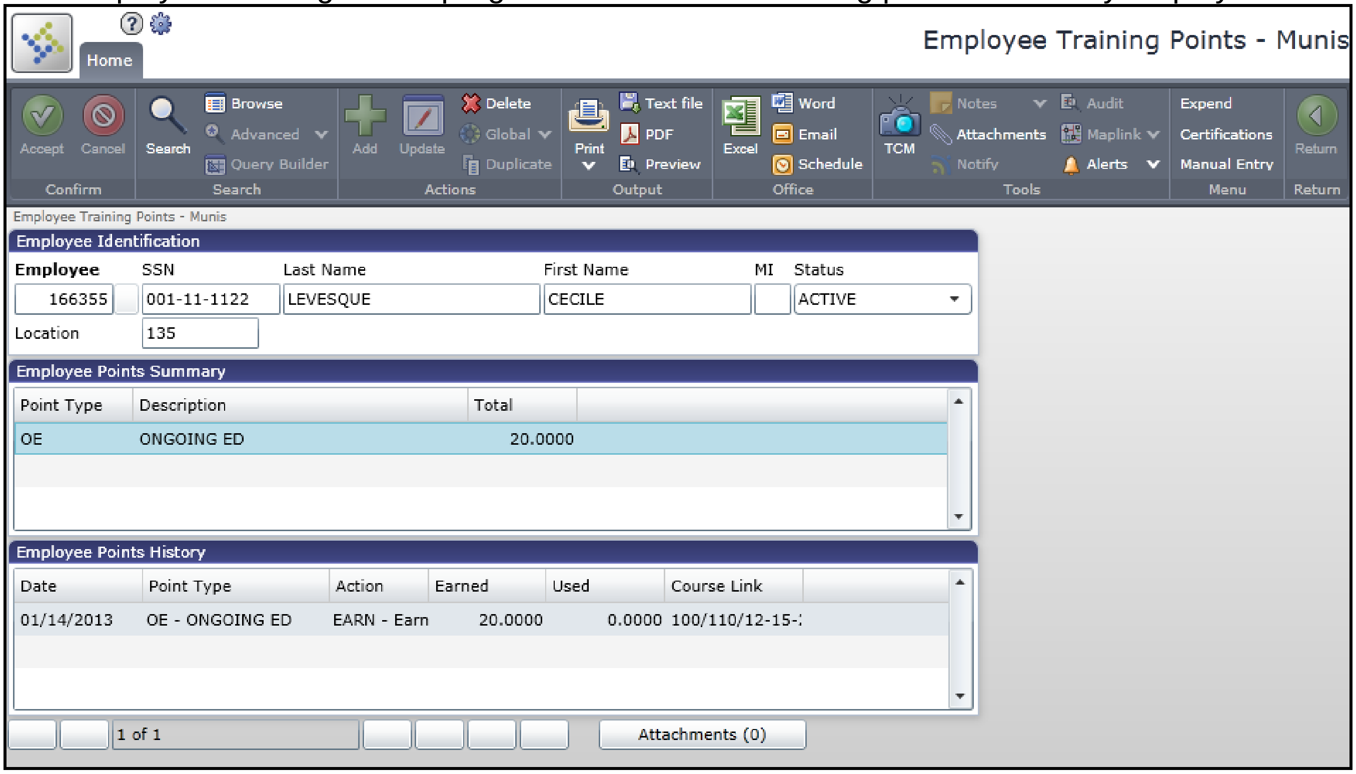


In the Training Courses program, the Course Details tab includes the Points Type and Accredited Points fields.



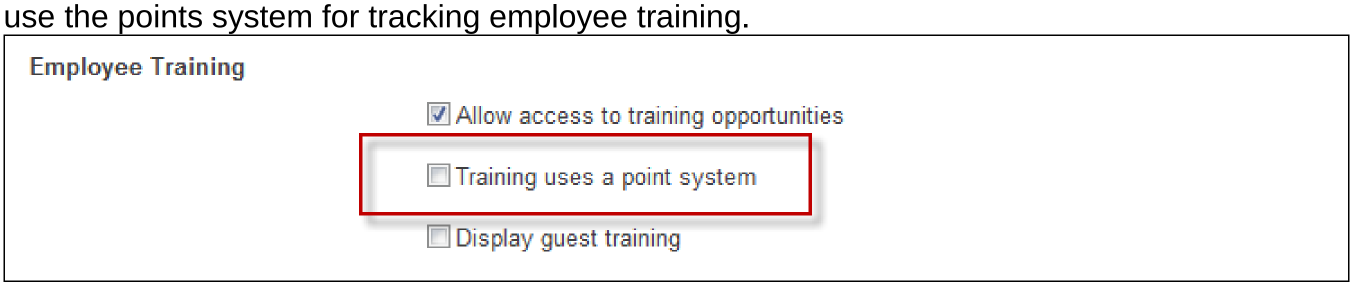
The Points Type list defines the type of points that employees earn by completing the active course, for example, a college course or specialized skill training course. The Accredited Points box defines the number of accredited points the employee earns for completing the course, if the course is accredited.

The Employee Training Points program maintains the training points earned by employees.

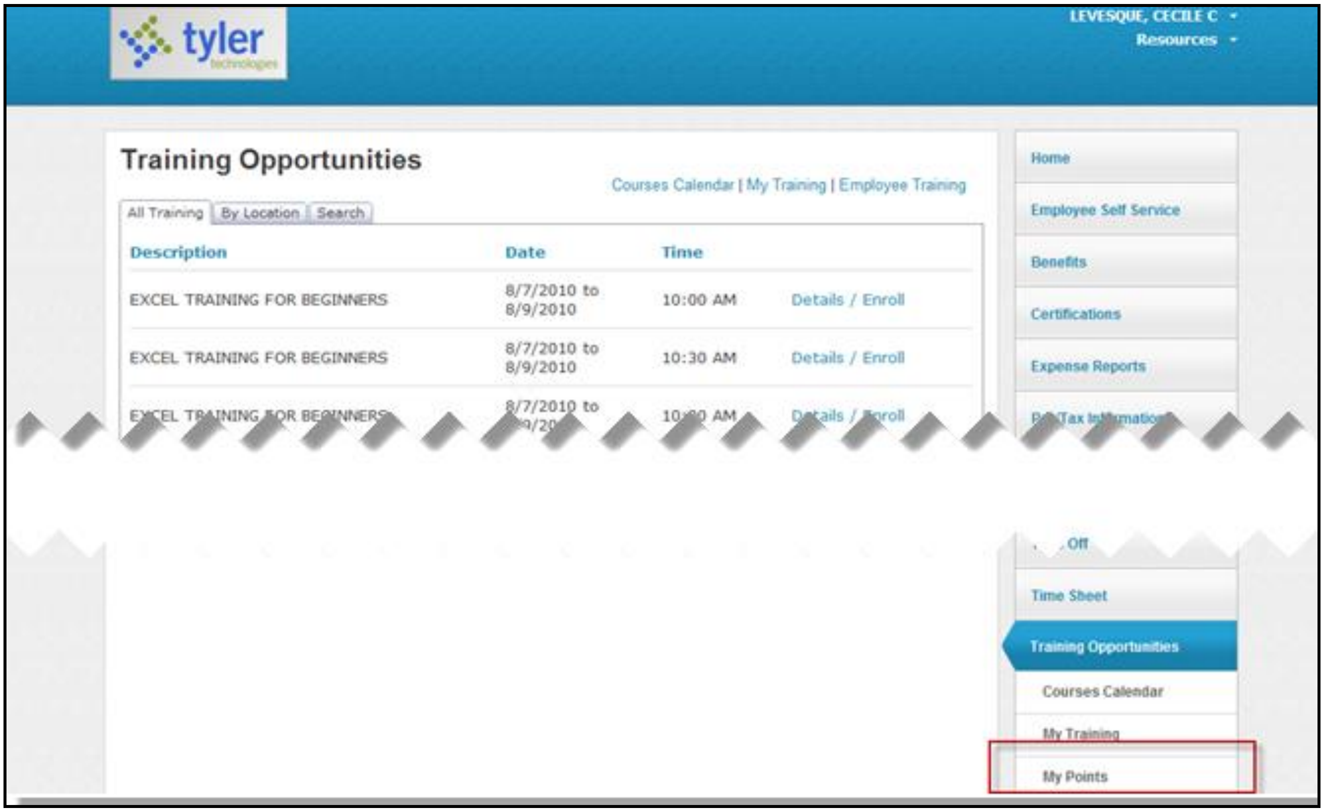


The Employee Training Points Inquiry program provides all employee-training point records in a display-only format.

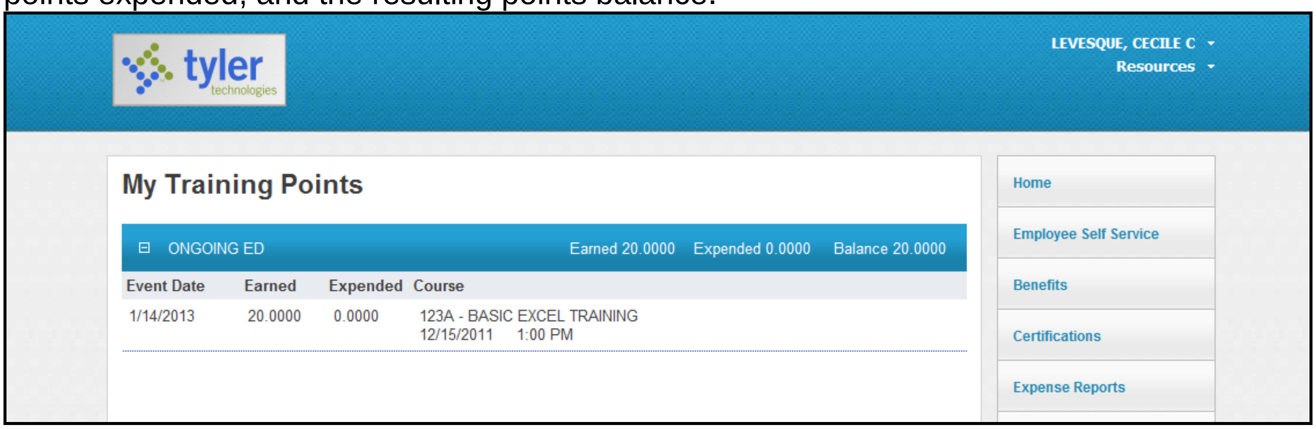
The training-points functionality is fully integrated into ESS. On the Application Settings page in ESS Administration, the Training Uses a Points System check box indicates that ESS should use the points system for tracking employee training.



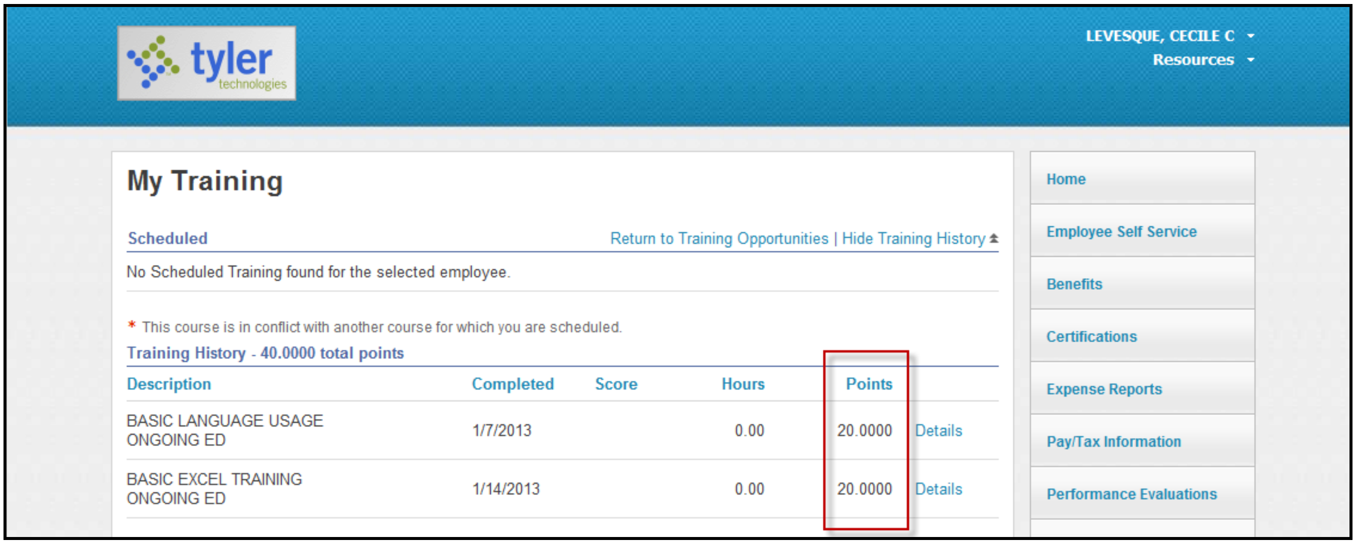
When you configure ESS to use points, the My Points option is available under Training Opportunities on the ESS menu.



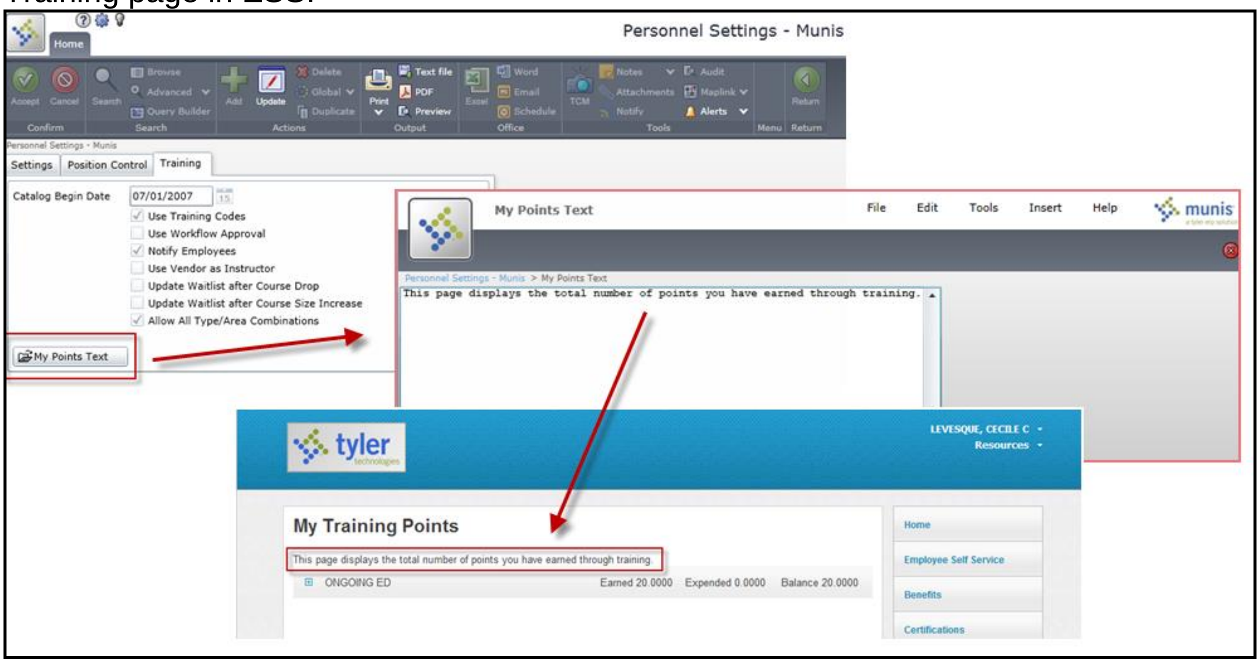
When employees click My Points, the program displays the My Training Points page, which displays previous courses organized by points type. In addition, it displays points earned, points expended, and the resulting points balance.



The My Training page displays the employees' points information and hours information. When you do not configure ESS to use a points system, the page displays only hours information.

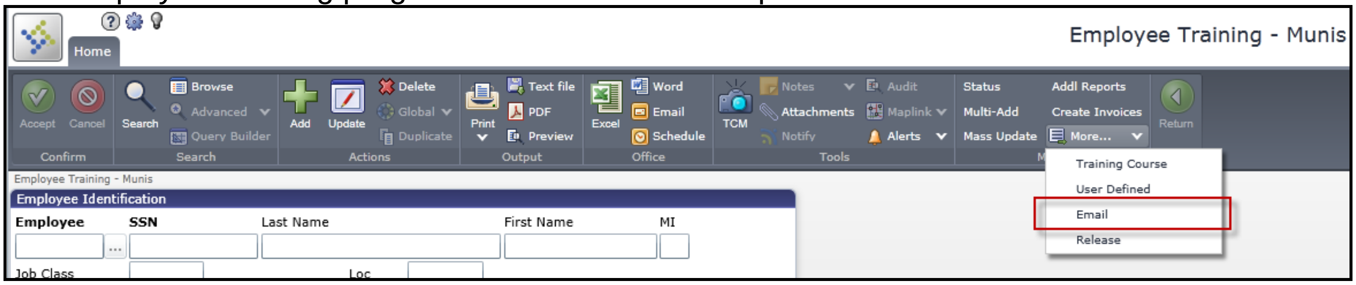


In the Personnel Settings program, the My Points Text option displays the My Points Text screen, where you can where you can view or update the instructional text included on the My Training page in ESS.

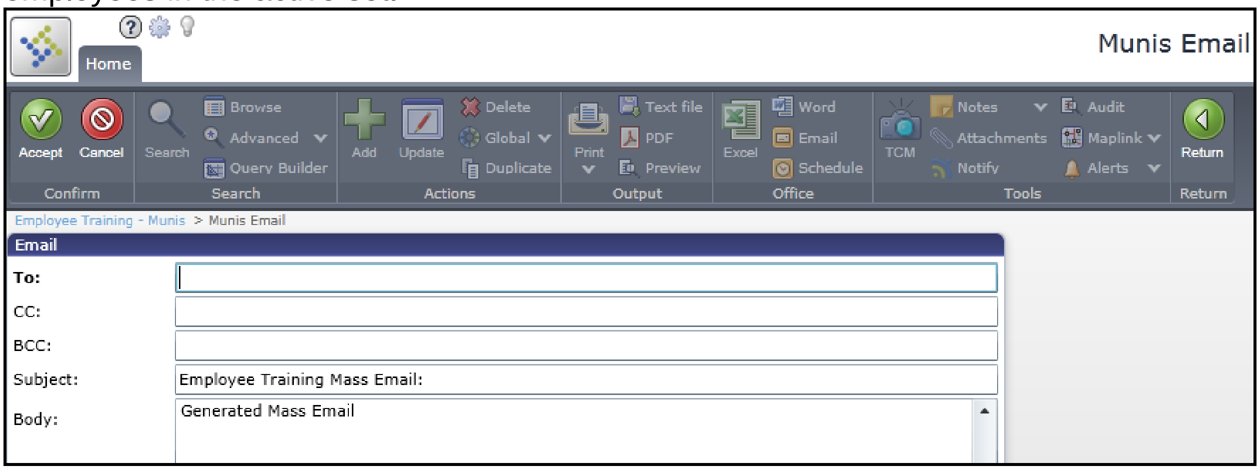


Employee Training

The Employee Training program includes the Email option.



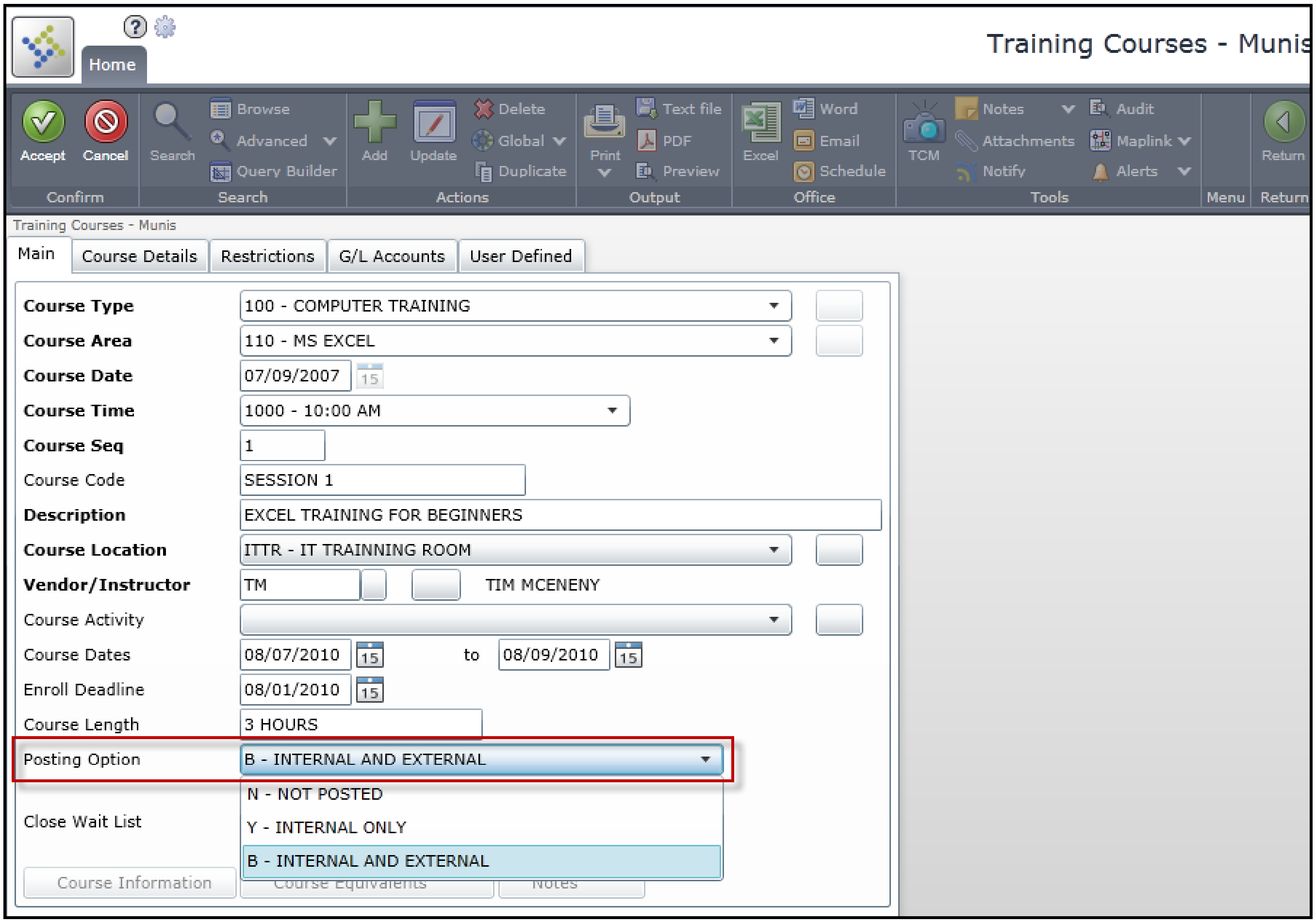
Click Email to display the Munis Email screen, where you can write and send an email to all employees in the active set.



Guest Training

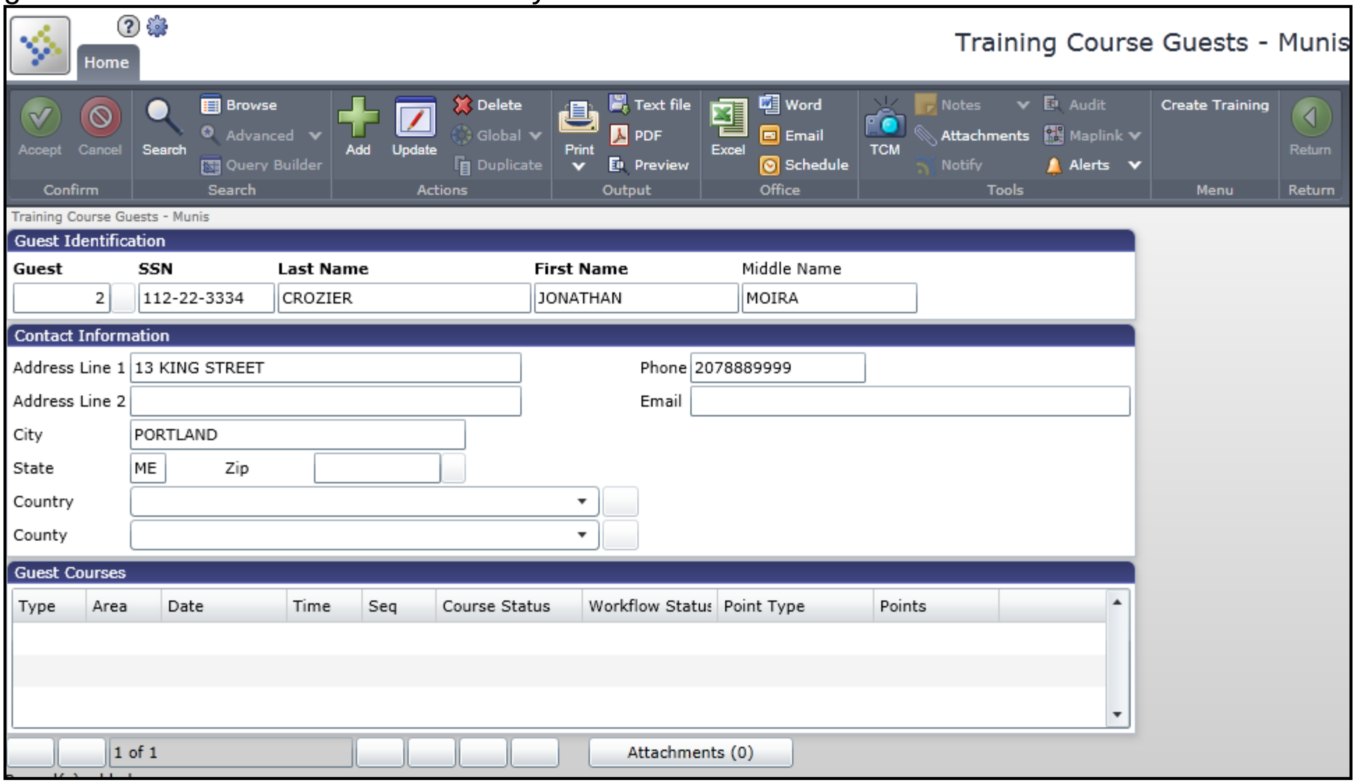
The guest-training functionality in the Employee Training programs enables you to make courses available to individuals who are not employees of your organization.

To configure guest training, select the Posting Option list on the Main tab of the Training Courses program.



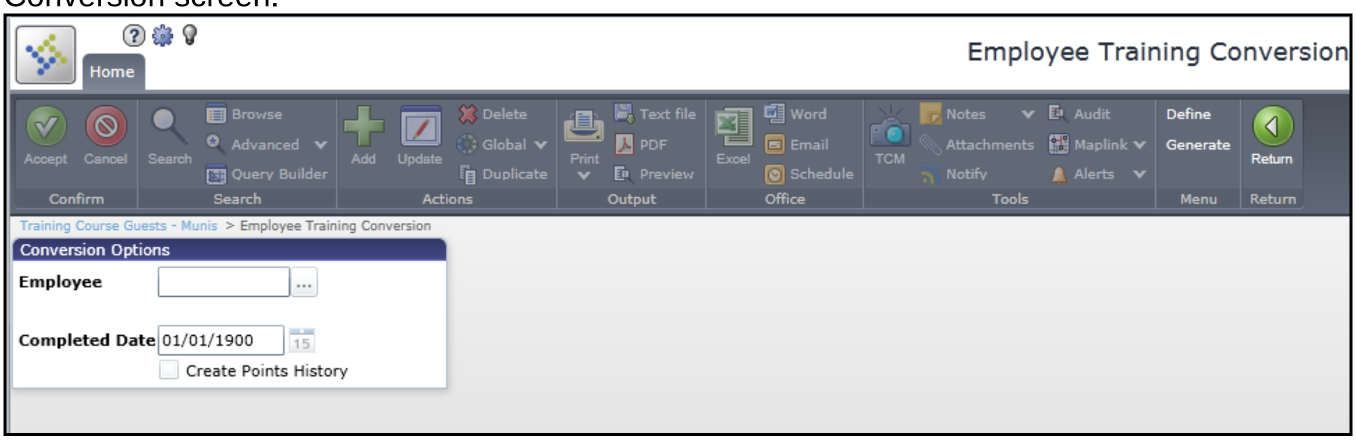
The Posting Option list indicates who can view the course in ESS. Use the B – Internal and External option to specify that the course is available to both employees and individuals who are not employees, or guests.

The Training Course Guests program maintains records for training guests, including their general information and course history



Guest records created and added to a course are accommodated within the existing waitlist functionality, and are included in report generation or when calculating the occupancy of a course.

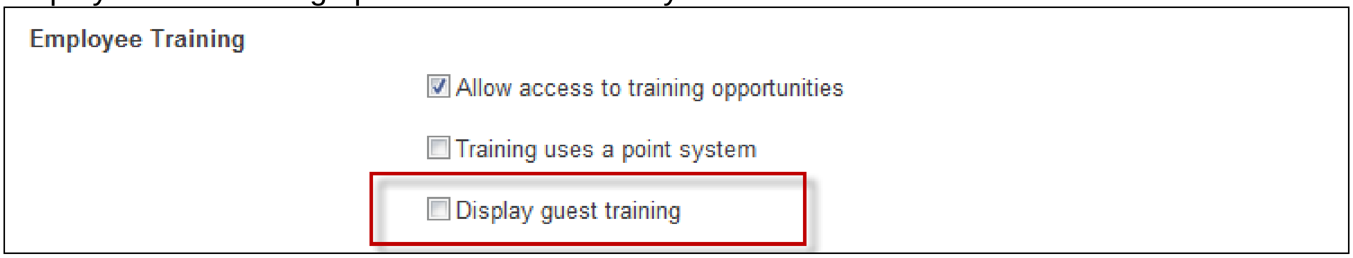
When a guest record is active, click Create Training to display the Employee Training Conversion screen.



This screen allows you to create employee training records for the guest. An employee record must already exist for the guest before training records can be created.

The Training Course Guests Inquiry program provides all guest training records in a display-only format.

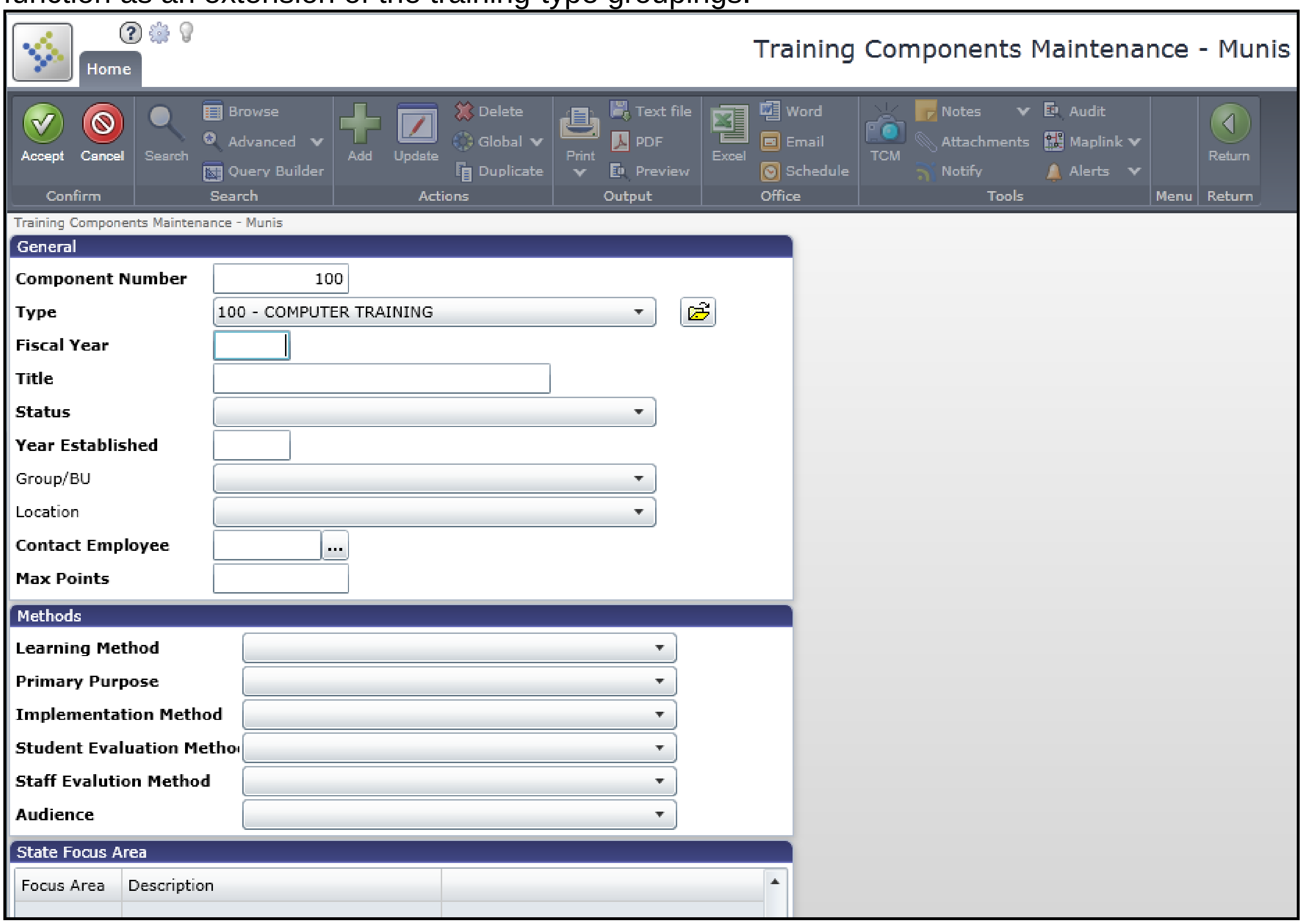
The guest training functionality is fully integrated into ESS. When the Display Guest Training check box is selected in the Employee Training group on the Application Settings page in Employee Administration, guests can view courses that have been marked as external. The Display Guest Training option is not selected by default.



Guests can view the details for a training course, but they cannot enroll. To enroll, guests must email the course contact.

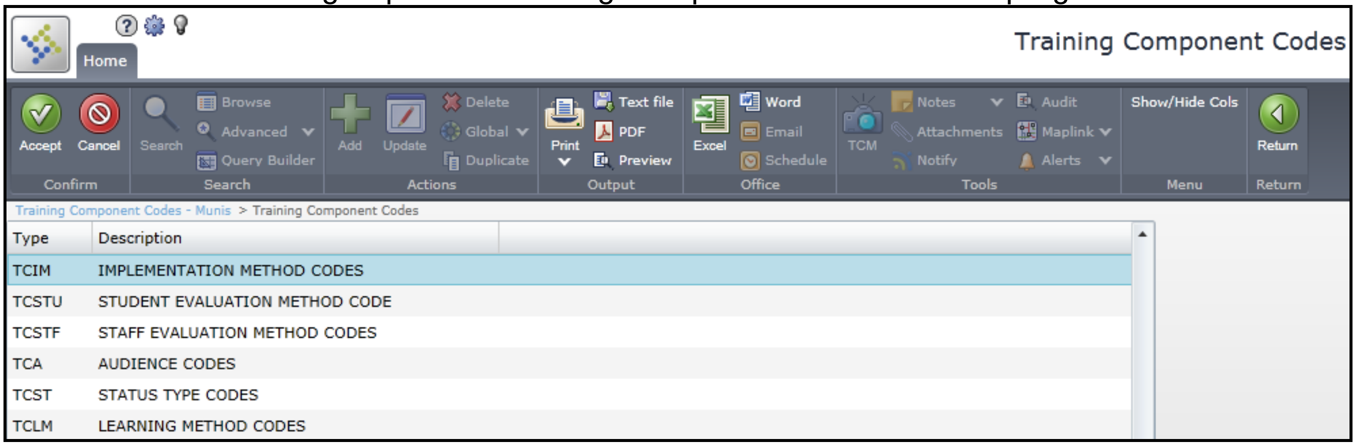
Training Components

The Training Components Maintenance program creates and maintains course groupings that function as an extension of the training-type groupings.



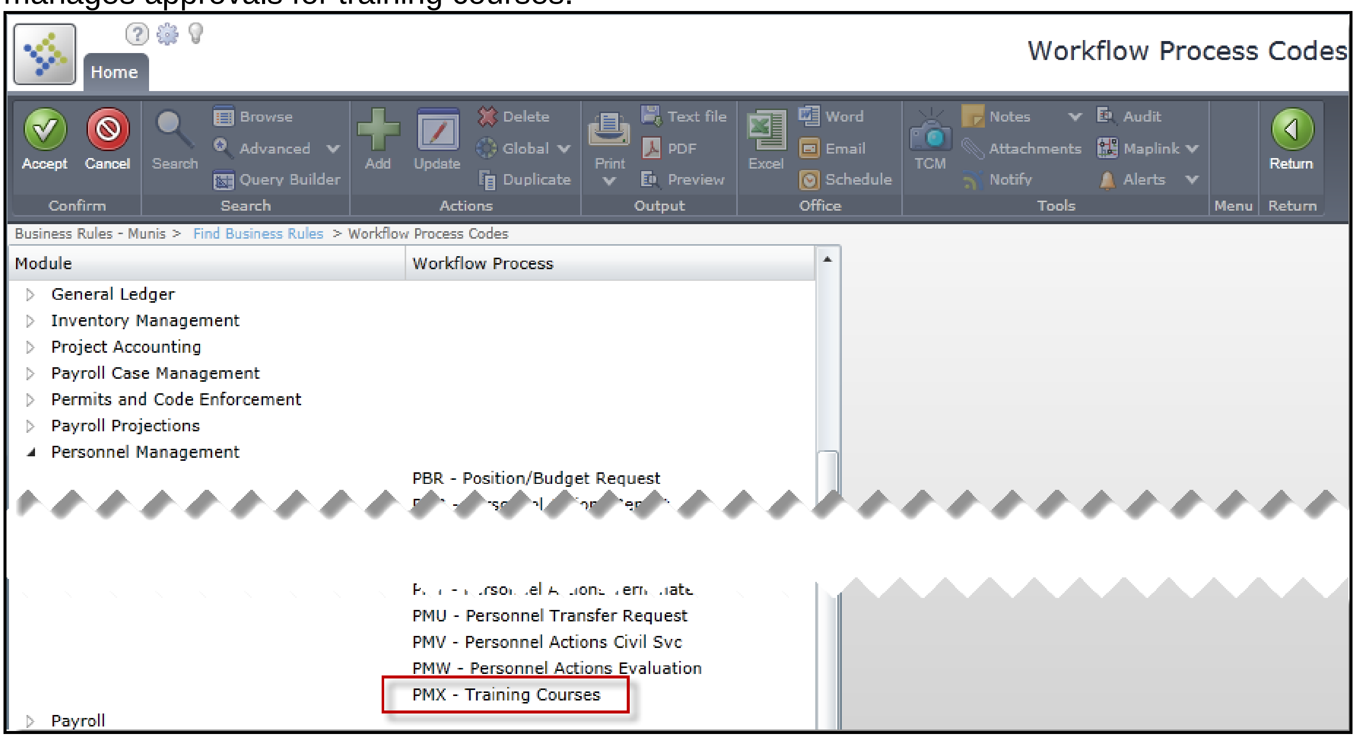
Training components are defined by fiscal year and include lists, such as Learning Method, Audience, and Audience, that allow you to select from user-defined values. Use the Training

Component Codes program to define the options that are available on the lists in the Methods and State Focus Area group in the Training Components Maintenance program.

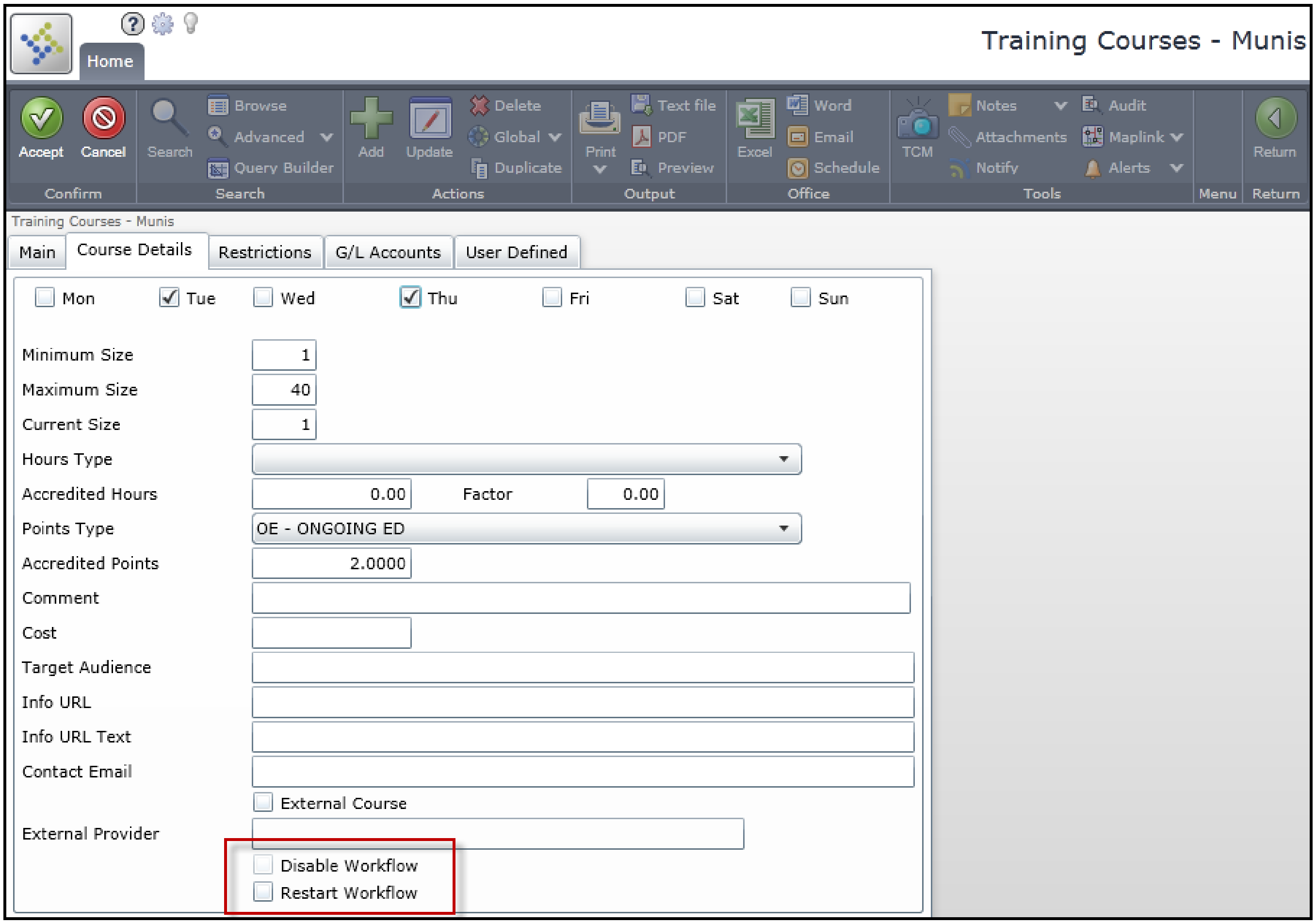


Training Workflow

In the Workflow Business Rules program, the PMX – Training Courses workflow process manages approvals for training courses.



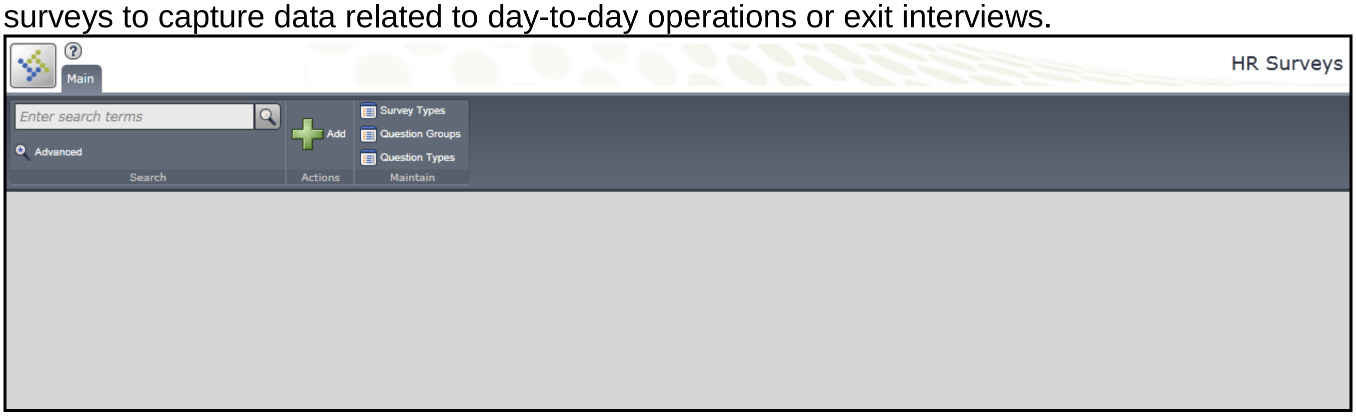
The Training Courses program includes the Disable Workflow and Restart Workflow check boxes.



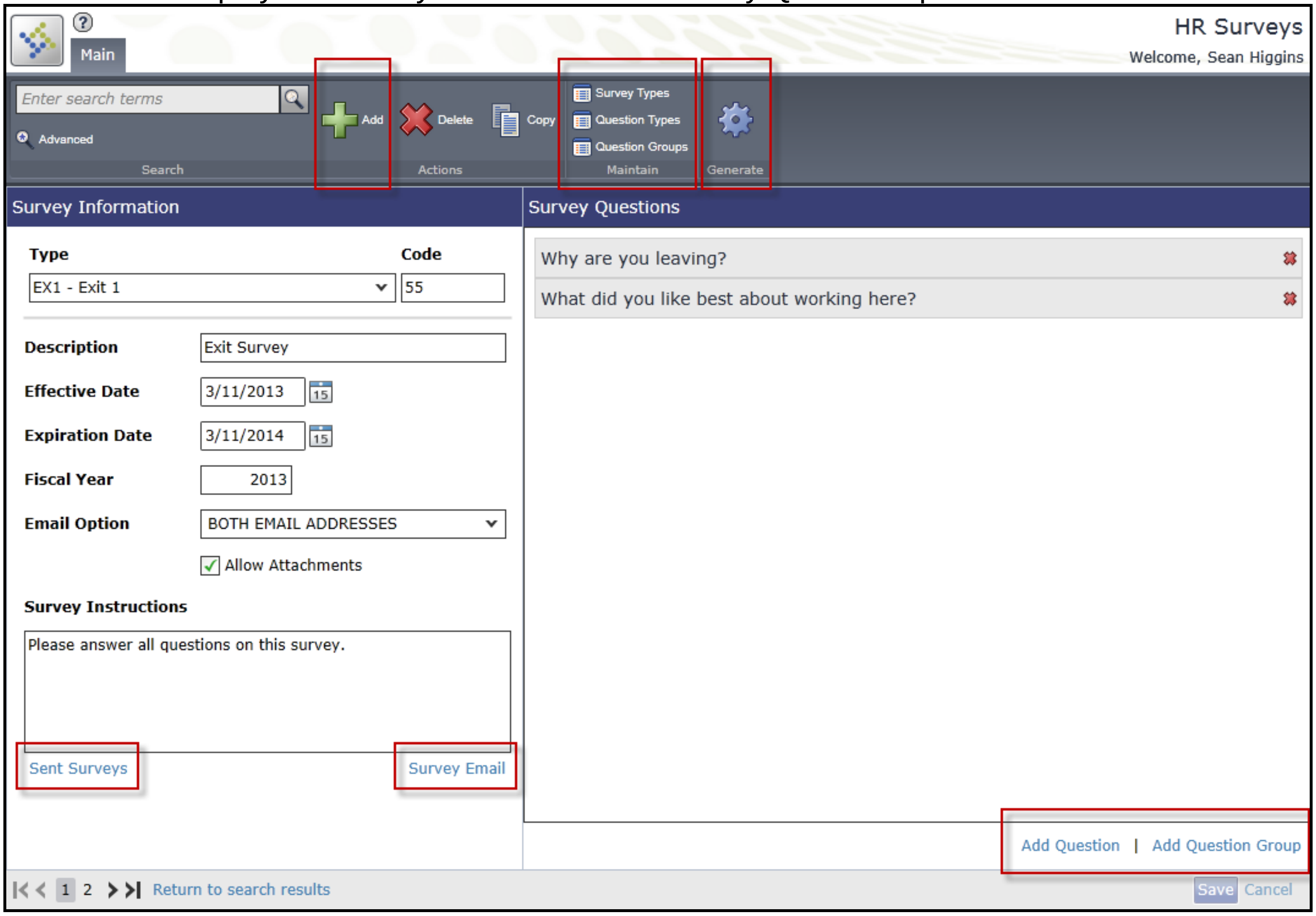
If you have the proper permissions, select the Disable Workflow check box to temporarily stop the workflow process for the course, for instance to add an employee to the course from the waitlist. Select the Restart Workflow check box to enable the workflow process.

HR Surveys

The HR Surveys program allows you to create, deliver, and track survey-related questions and answers for employee interviews. Using this program, you can create generic or job-specific surveys to capture data related to day-to-day operations or exit interviews.



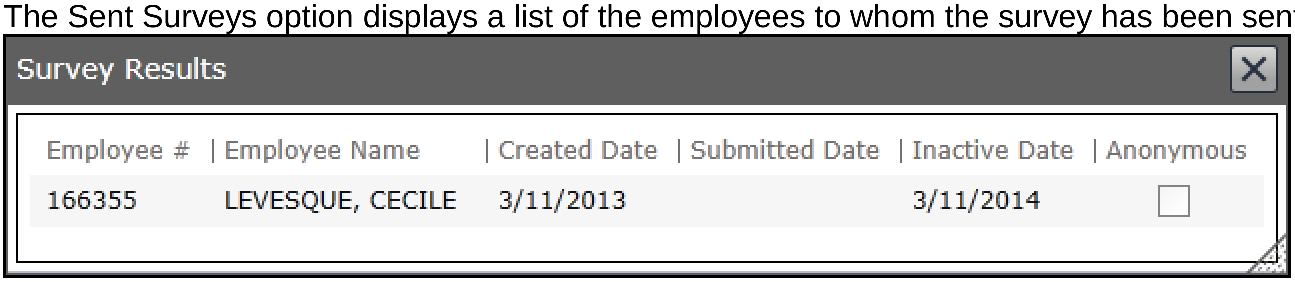
Click Add to display the Survey Information and Survey Questions panes.



The Survey Types, Question Groups, and Question Types options maintain standard survey information that can be used in any survey. The Add Question and Add Question Group options define the questions for a specific survey. When you add a question, available answer data types include date selection, text, decimal, and multiple choice.

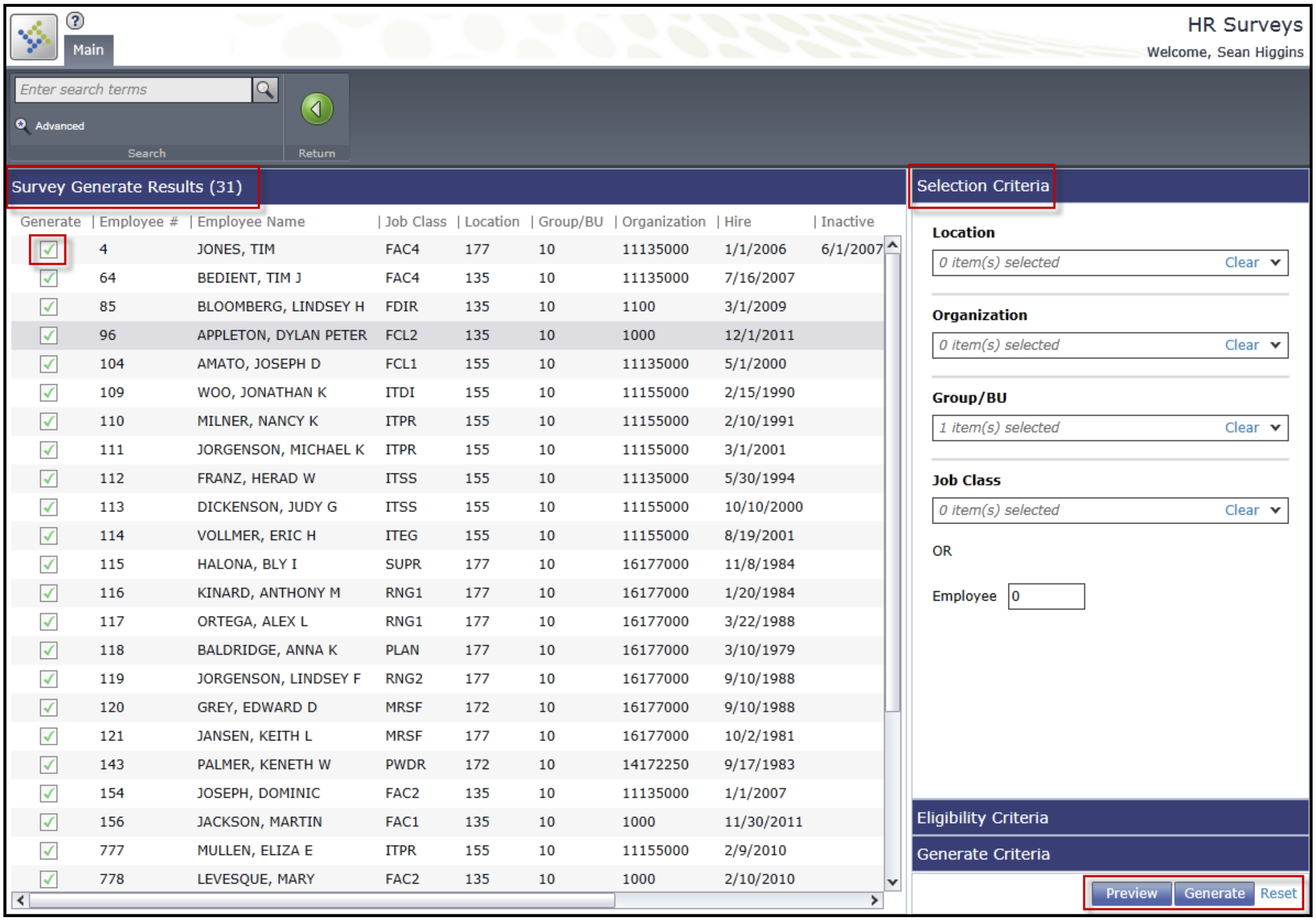
The Survey Email option maintains the text of email messages distributed to employees to whom the survey applies. Each employee's survey email message includes a link to the survey in ESS.

The Sent Surveys option displays a list of the employees to whom the survey has been sent.


Survey Results

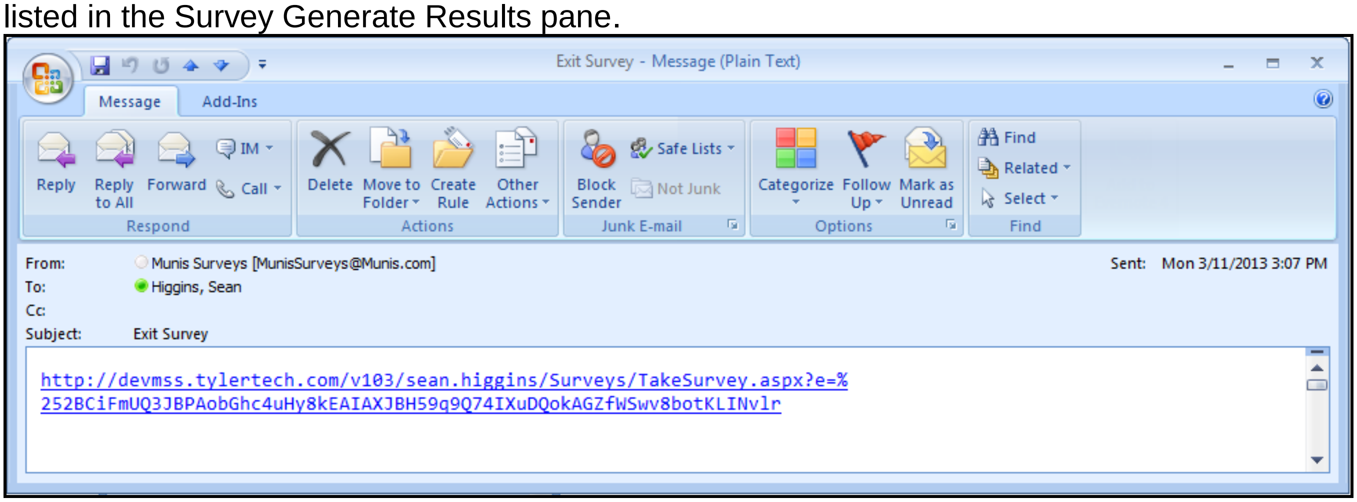
Employee #	Employee Name	Created Date	Submitted Date	Inactive Date	Anonymous
166355	LEVESQUE, CECILE	3/11/2013		3/11/2014	

The Generate option displays the Selection Criteria and Survey Generate Results panes, which allow you to select and preview the employees to whom a survey will be sent.

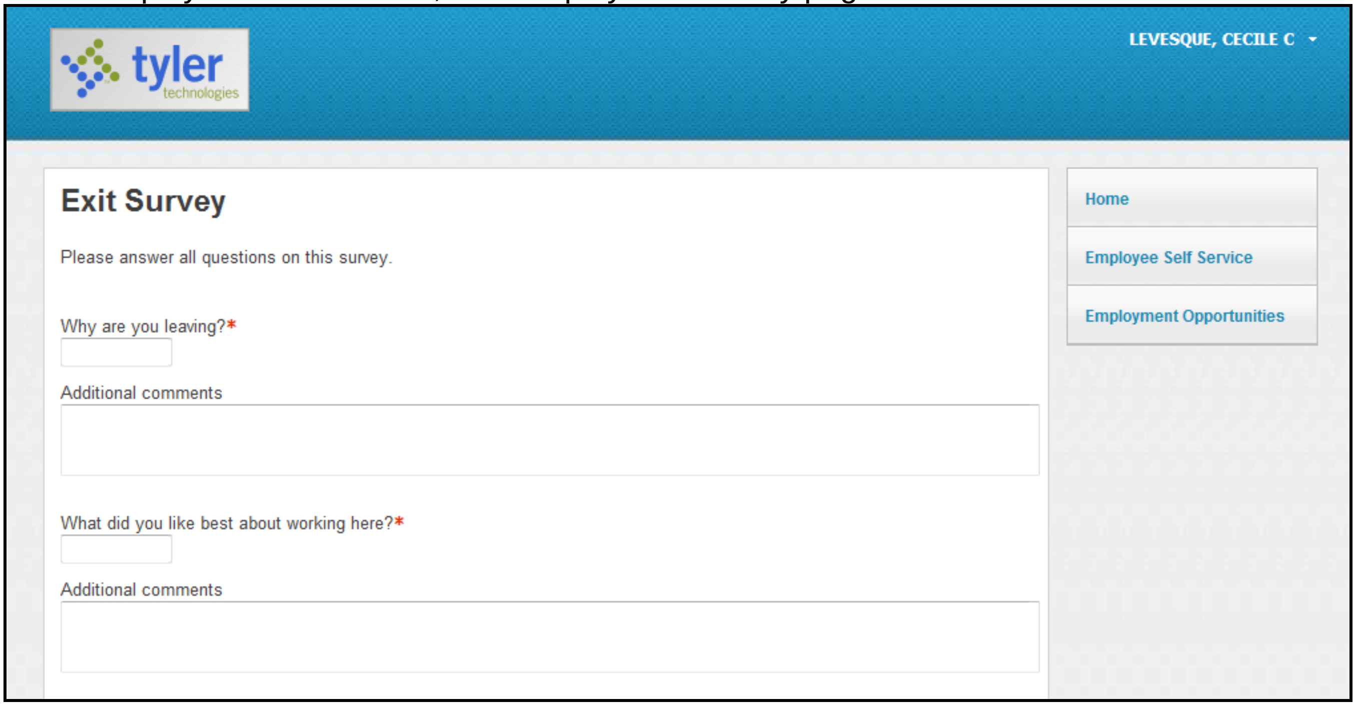


Define the options in the Selection Criteria pane and click Preview to view a list of the employees who fit those criteria. To exclude a specific employee from the survey distribution, clear the Generate box for that employee in the Survey Generate Results pane. The Reset option clears all entered selection criteria.

The Generate option generates both the survey and the email you defined for the employees listed in the Survey Generate Results pane.



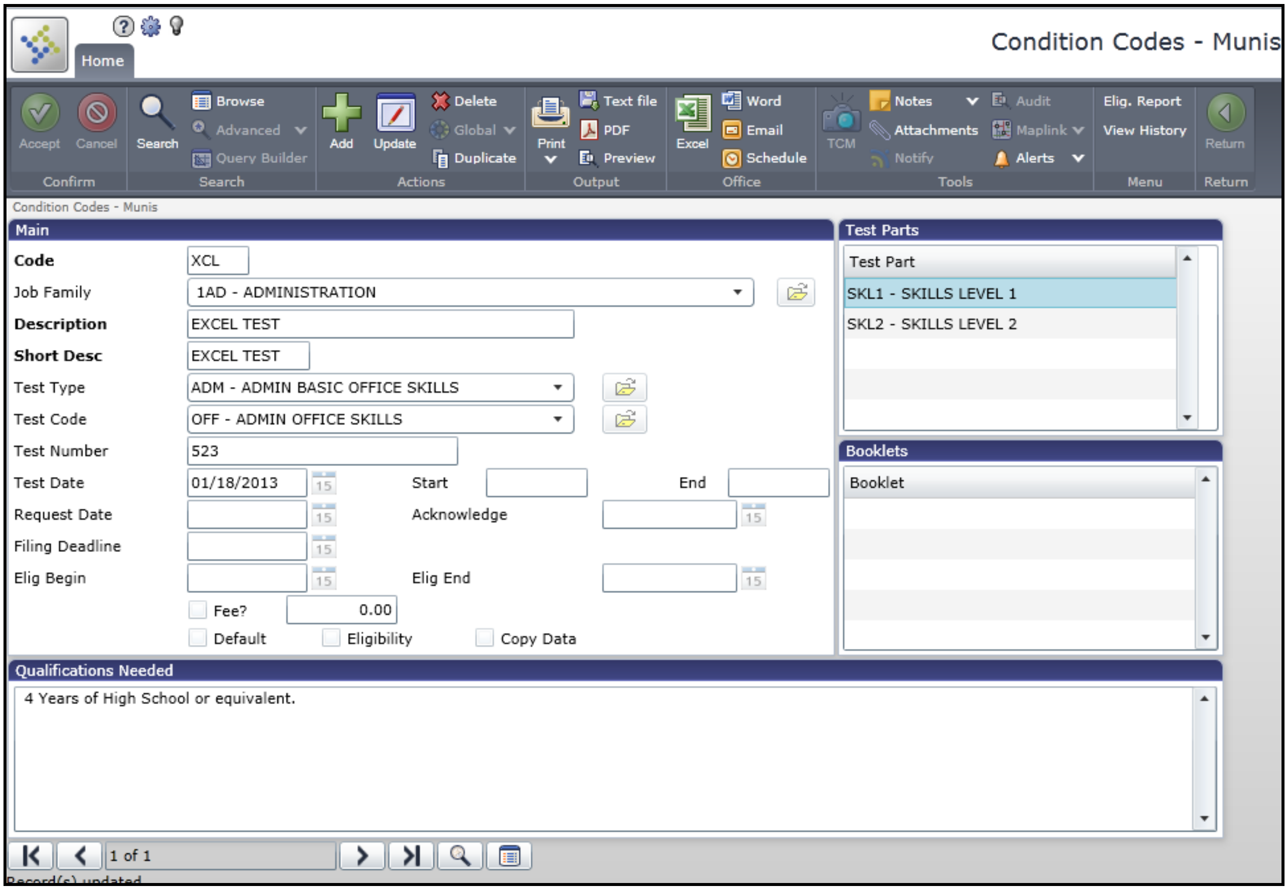
When employees click the link, ESS displays the survey page.



Test Tracking

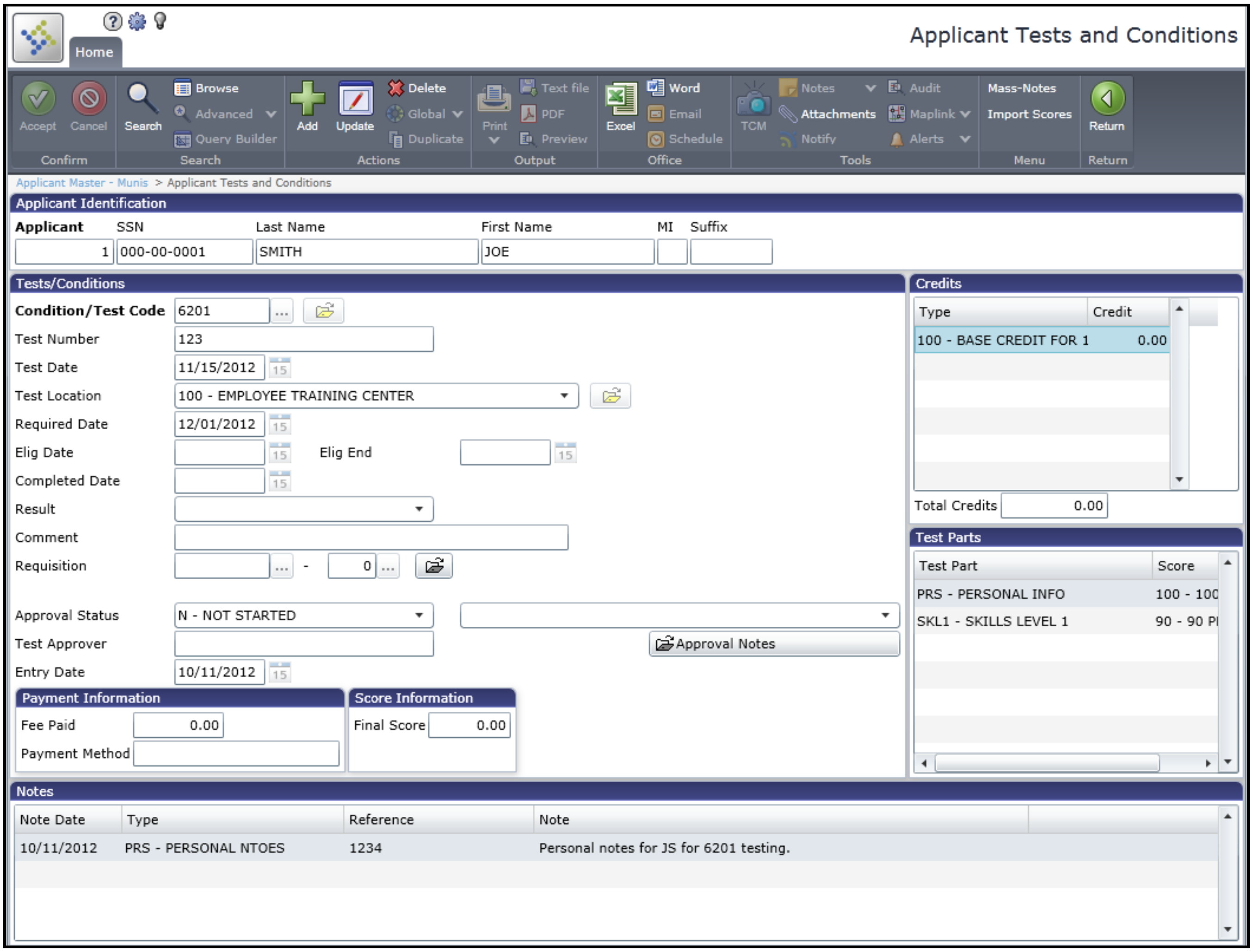
Applicant Processing includes the test-tracking functionality, which records data related to tests taken by applicants.

The Condition Codes program, which maintains condition codes for tracking applicant processing activities, is expanded to accommodate the tracking of individual instances of tests. For example, you can define a specific condition code for an instance of a test, which allows you to define and track unique parameters for that instance, including test number, test date, and included test parts. In addition, you can associate this instance with job openings and track the results of applicants who complete it.



The Test Type list indicates the type of test required for the job opening. The Test Code and Test Number fields further identify the test. The Test Date fields identify when the testing occurs, and the remaining fields identify test specifics.

Once the applicant has taken the test, you can view and update the test data on the applicant record, which is available on the Application Tests and Conditions screen in the Applicant Master program.

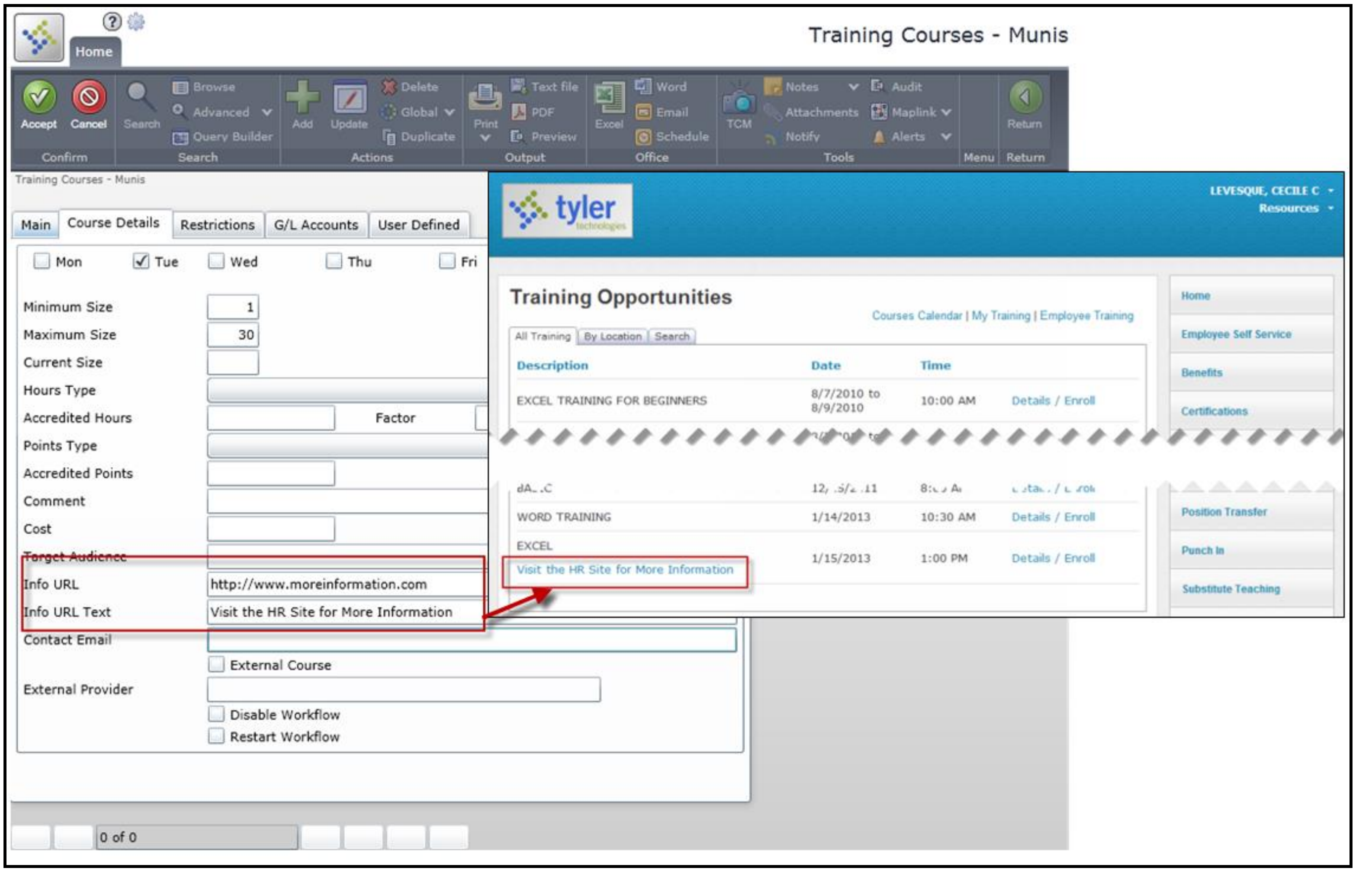


All related Applicant Processing programs, reports, and processes are updated to accommodate the test-tracking functionality.

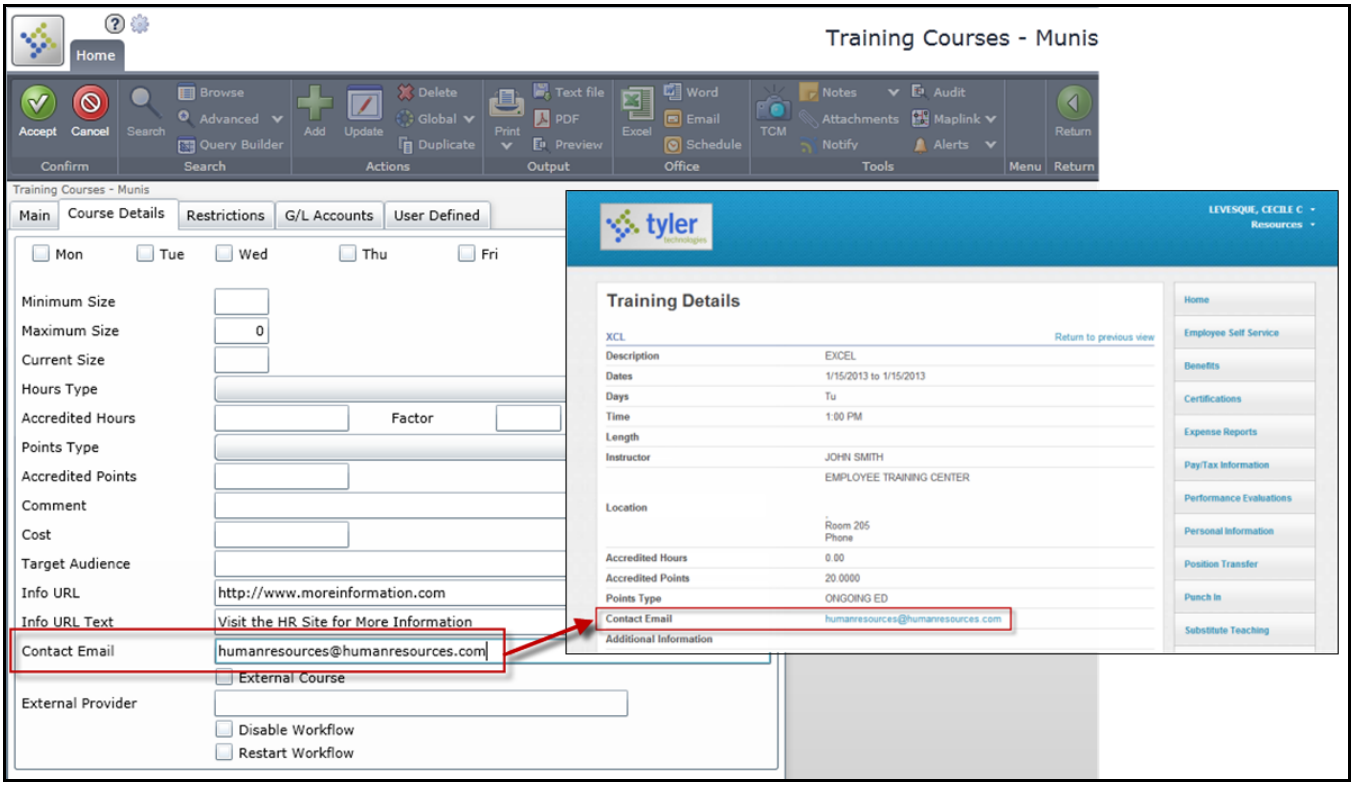
Employee Self Service

The Course Details tab of the Training Courses program includes the Info URL, Info URL Text, and Contact Email fields.

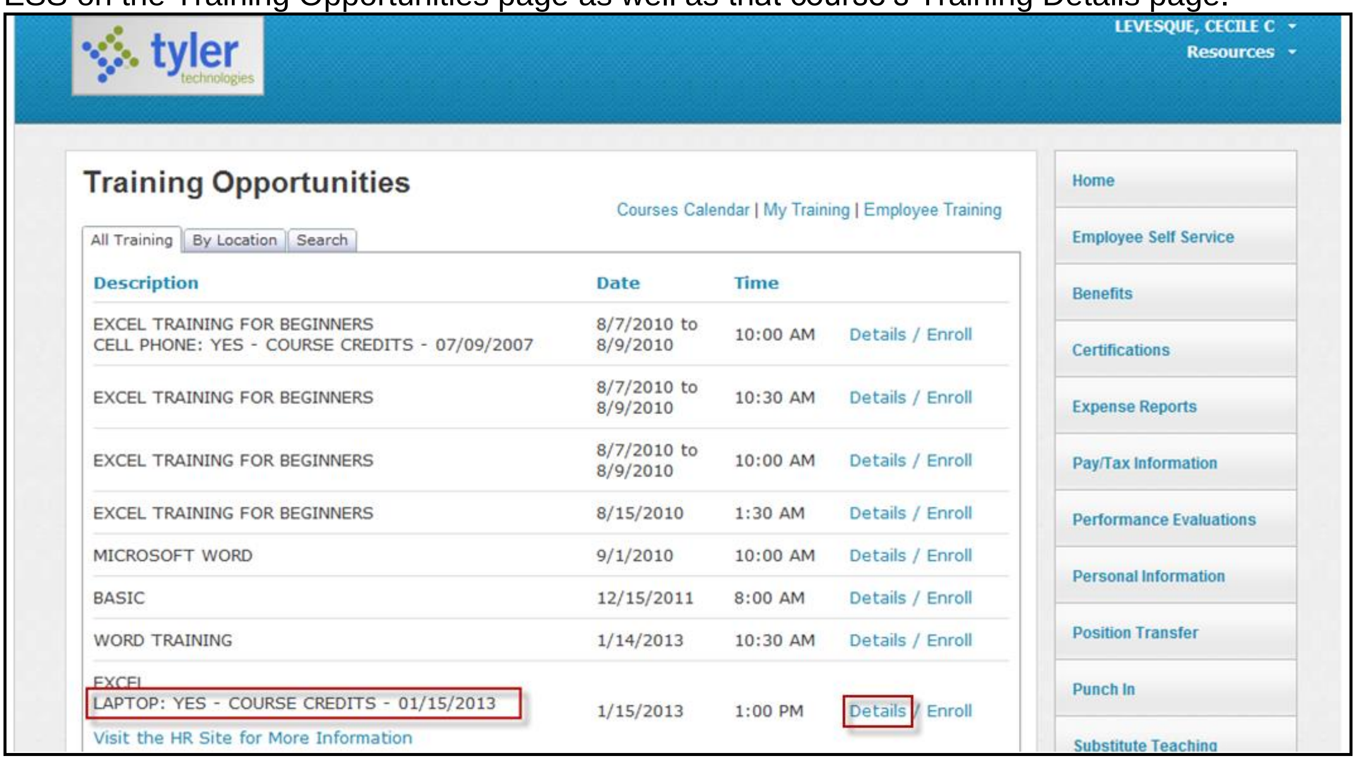
The Info URL box indicates the web address of a link that displays on an employee's self service Training Opportunities page and in the course's Training Details page. The Info URL Text box defines the text of the link.



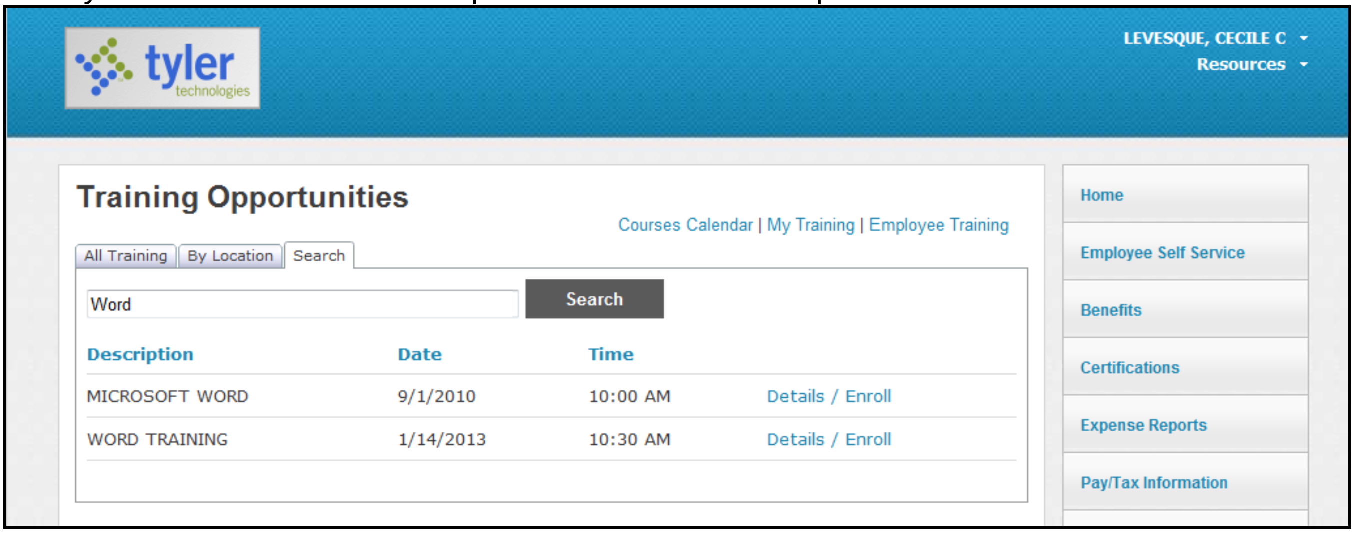
The Contact Email box defines the email address of a contact who can provide more information regarding the course. This email address displays on the course's training details page.



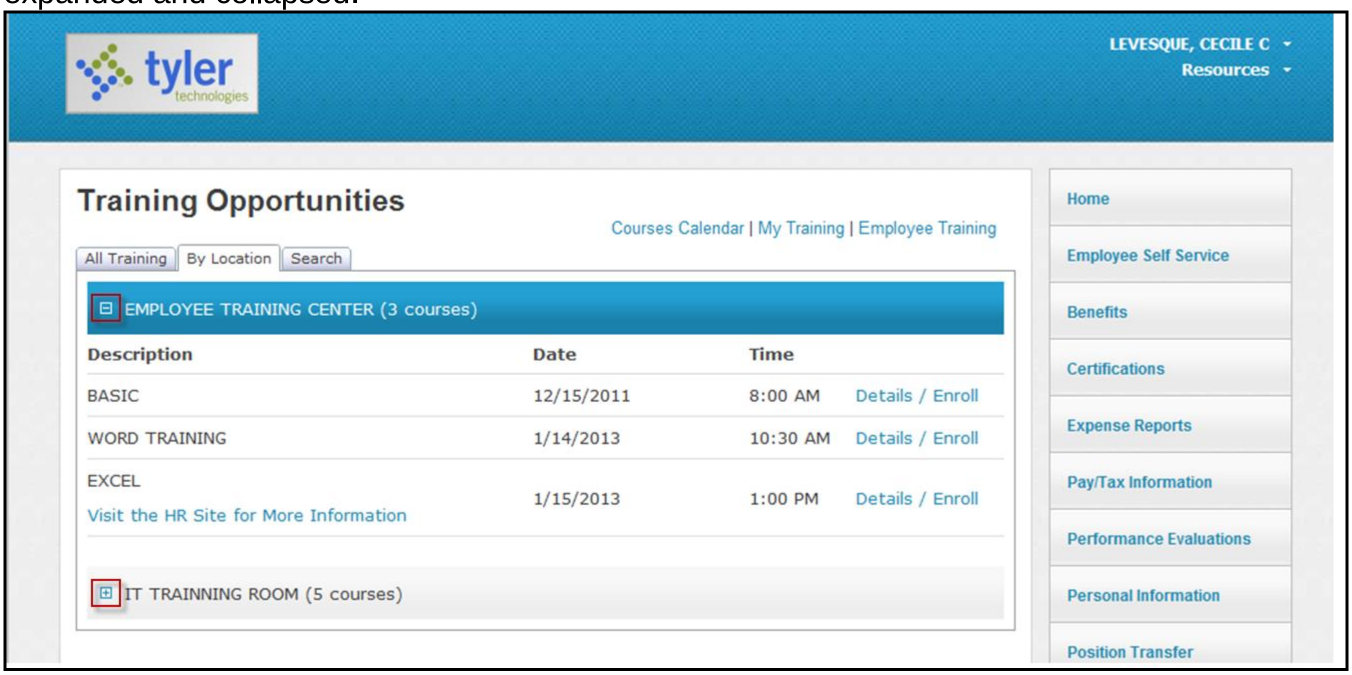
User-defined fields specified for any course in the Munis Training Courses program display in ESS on the Training Opportunities page as well as that course's Training Details page.



The Search tab on the Training Opportunities page enables you to find courses by searching for keywords in the course description and location description.



The By Location tab groups the available training course by location headings, which can be expanded and collapsed.



Payroll

The following changes apply to Munis Payroll programs.

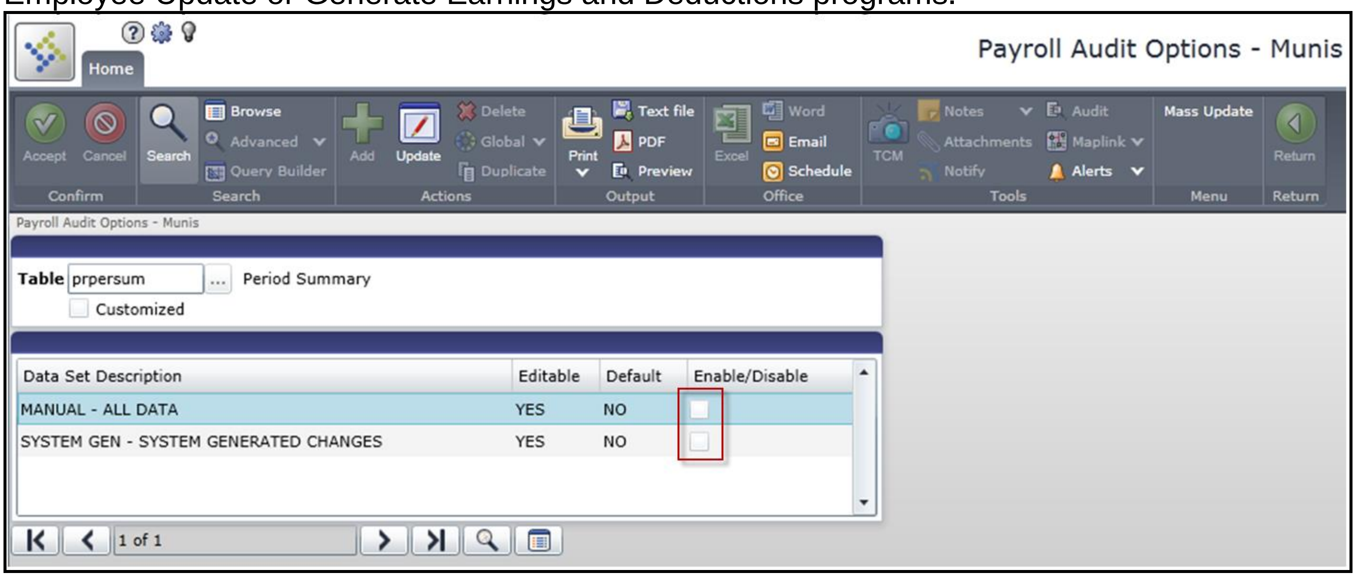
Audits

The system audits the old and new values of a field that is added, updated, or deleted. As a result, fields are properly audited when new records are added to a database, each record is reportable from outside of the Audit Inquiry program, and changes can be selectively excluded from auditing without breaking the audit trail. Both old and new values are stored on a single record.

Since auditing occurs on the database, this decreases the number of communications between two servers in split-server environments and improves the efficiency of the audit process.

During the audit process, more information is written to each audit record, including the name of the program from which the change was made. This allows you to determine how the change was made, when the change was made, and by whom it was made.

Though the audit tables are smaller in size, writing more data creates a greater number of audit records. To enable a more refined selection of changes to audit, in the Payroll Audit Options program, the All audit option has been replaced by the Manual and System Gen audit options for tables affected by programs that process changes at a mass scale, such as the Employee Update or Generate Earnings and Deductions programs.



The Manual option toggles auditing for all changes made by users. The System Gen option toggles auditing for system-generated changes made by specific programs. For instance, leave the System Gen option disabled for the Accumulators table to set the Employee Update program not to make audits to the table each time it is run, which greatly reduces the number of audits.

This functionality is available for the following tables. Each table is accompanied by the programs for which auditing can be toggled off and on with the System Gen option.

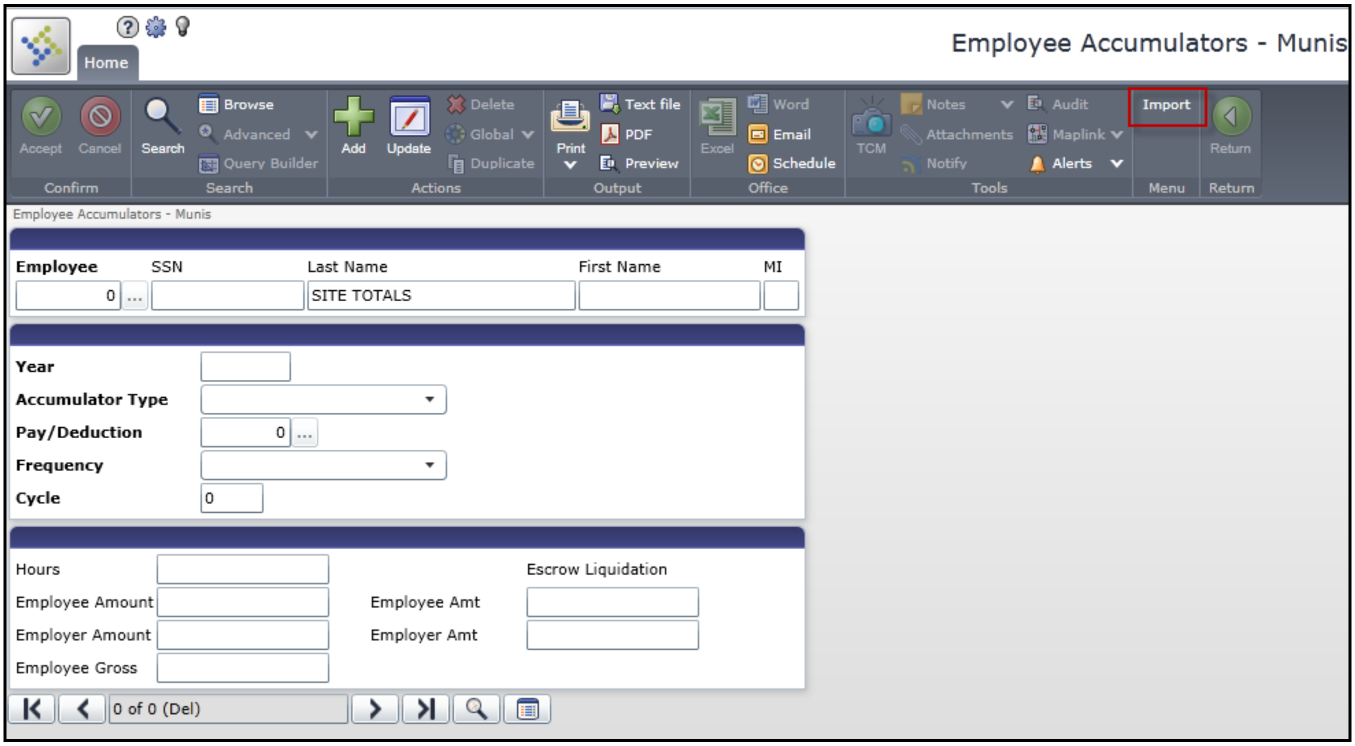
Table	Name	Programs
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions
prpmppay	Period Pays	Employee Update, Generate Earnings and Deductions
prpmdded	Period Deductions	Employee Update, Generate Earnings and Deductions
prglallc	Period Pay Manual GL Allocations	Employee Update, Generate Earnings and Deductions
prperach	Period Accrual History	Employee Update, Generate Earnings and Deductions
prperacc	Period Accruals	Employee Update, Generate Earnings and Deductions
pryeeapp	Year End Accrued Expense Pays	Employee Update
pryeeapd	Year End Accrued Expense Deductions	Employee Update
prdedhis	Deduction History	Employee Update
prearnhi	Earnings History	Employee Update
prempacm	Employee Accumulators	Employee Update
prpersum	Period Summary	Employee Update, Generate Earnings and Deductions

When the Manual option is enabled and the System Gen option is disabled, the system audits only changes made outside of the defined programs, whether those changes are made by other Munis programs or directly to the database. This results in a significant decrease in audit data size and communication with the database while preserving an otherwise comprehensive audit trail. In addition, payroll processing time is equal to when auditing is turned off.

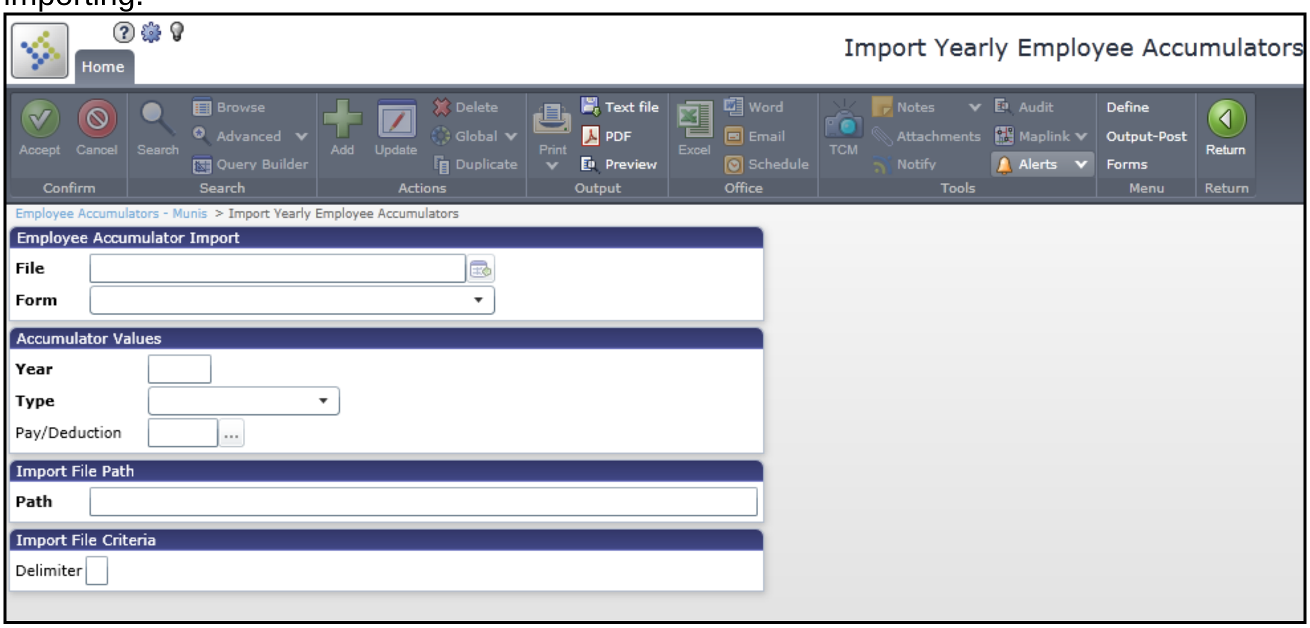
Both options are disabled by default for new customers; selections made by existing customers on the relevant tables are migrated.

Employee Accumulators

The Import option in the Employee Accumulators program imports yearly amounts for employee deductions or pays.



Click Import to display the Import Yearly Employee Accumulators screen, where you can define the parameters for your import, including the file to import, the form definition to use when processing the import file, and the year and type of the accumulator records you are importing.



The import function imports only yearly records. Unless you are re-importing values for existing yearly records, the function does not update any existing deduction or pay amounts.

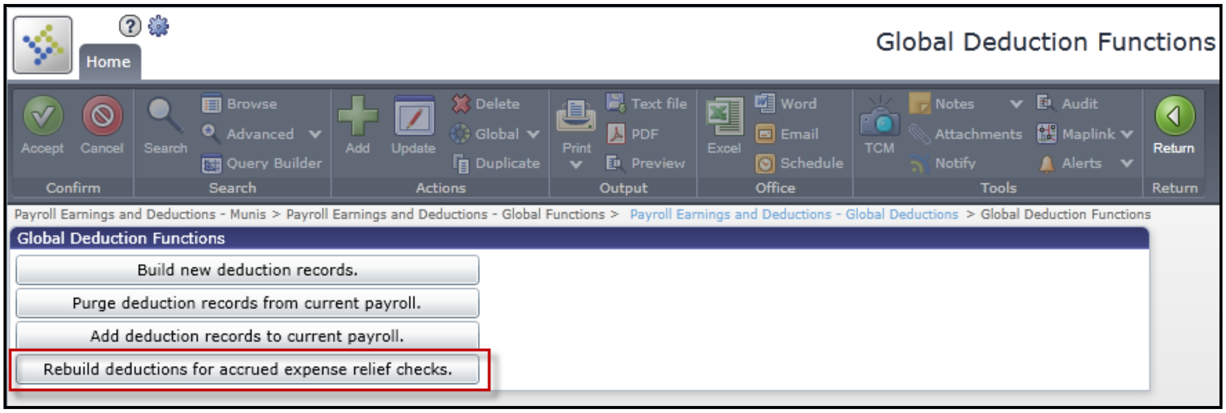
Payroll Control Settings

Category	Setting	Description
General	ESS User Name Format and Sync Mode	This option, when enabled, directs the system to synchronize changes made to an employee's name in Employee Master to that employee's name in ESS. You can select a number of name formats for the synchronization, including first name and last name; first name only; or last name, middle initial, first name.
Generate	Prorate Pay Hours	This option, if enabled, sets calc codes CC11, CC32, CC33, and CC70 to prorate hours by dividing the pay amount by the pay rate.
Generate	Include Escrow Balance on Final Pay	This option, when enabled, sets pay type 5 to determine its final escrow pay amount by adding the remaining escrow balance to the pay amount.
GL Posting	Default Cash Account Project Code	This option, if enabled, allows you to define a project code for the cash account in addition to the general project code.
Time Entry	Use Hours/Days on Teacher Salary Record for Sub	This option, when enabled, sets a substitute teacher's pay rate in Time Entry to that of the teacher for whom they are substituting.
Time Entry	Calculate FLSA By Gen Level Dates	This option, when enabled, allows you to use generate level dates when processing FLSA periods within the Time Entry move process.

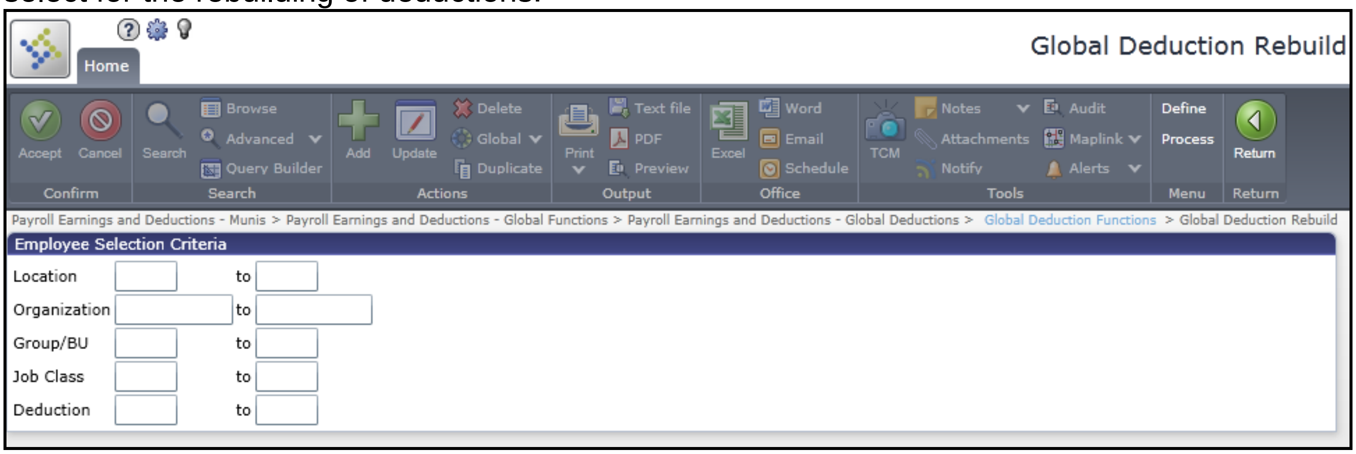
Payroll Earnings and Deductions

The Rebuild Deductions for Accrued Expense Relief Checks option enables you to make changes to deductions on accrued expense relief checks.

To navigate to this option in Payroll Earnings and Deductions, click Global to display the Global Functions screen and then select the Global Access to Deduction Records option to display the Global Deductions screen. On this screen, click Global to display the Global Deduction Functions screen.

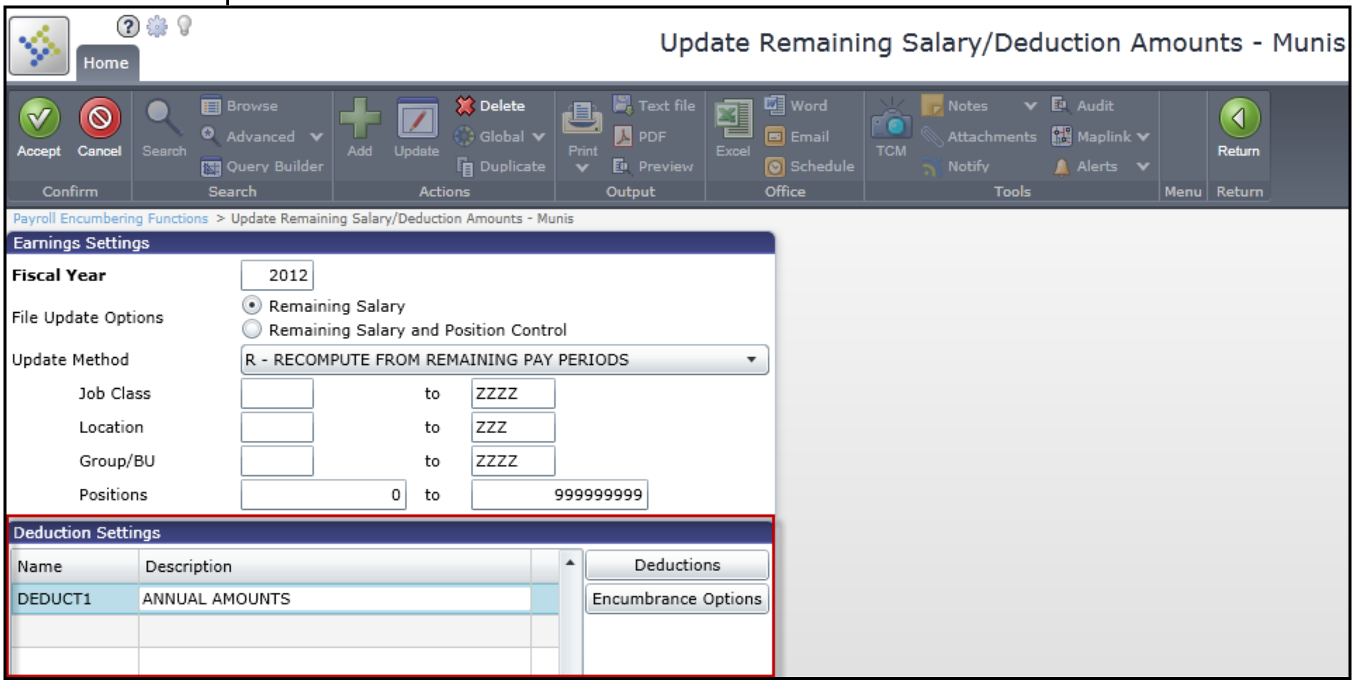


Click the Rebuild Deductions for Accrued Expense Relief Checks option and the program displays the Global Deduction Rebuild screen. Use this screen to define which employees to select for the rebuilding of deductions.



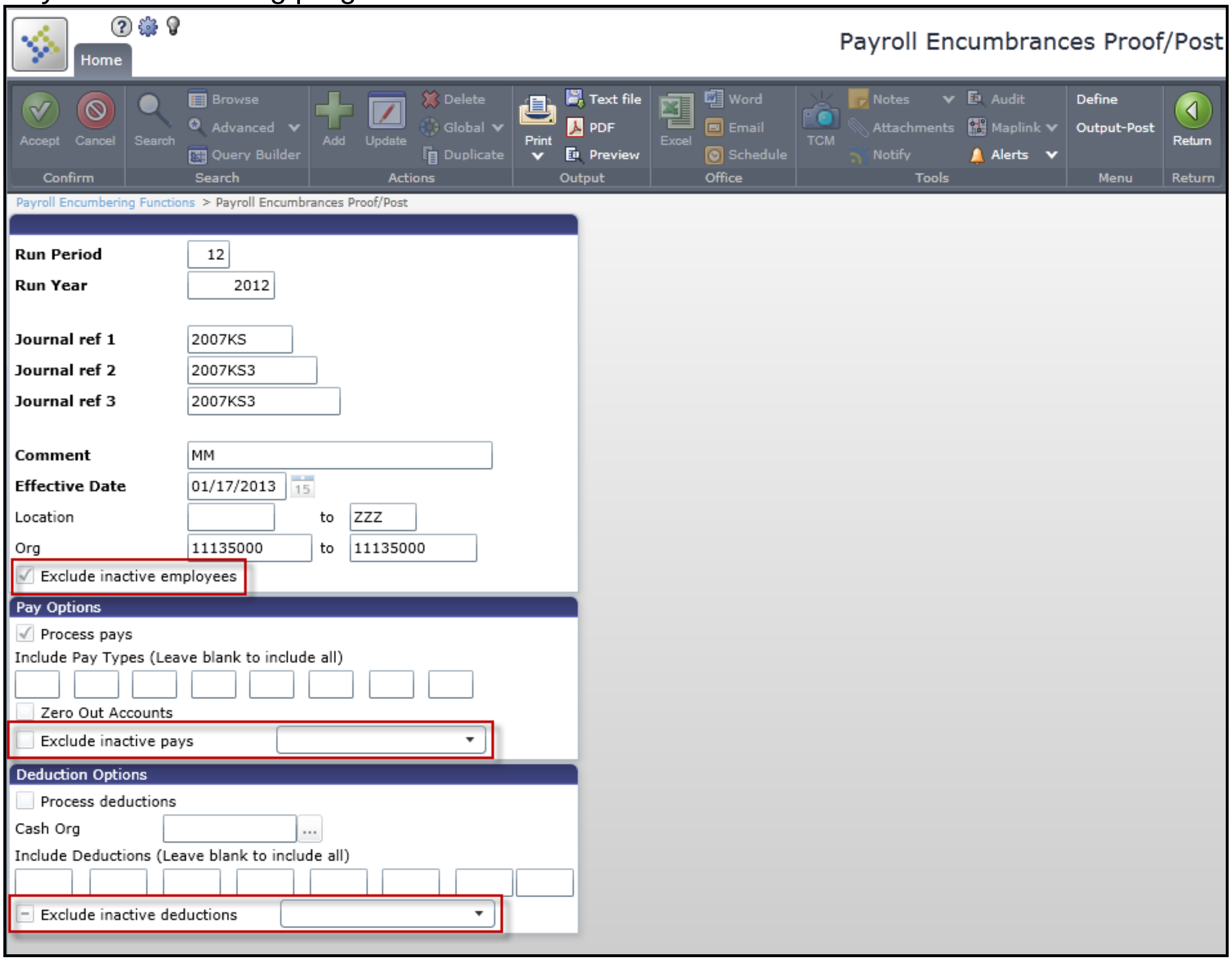
Payroll Encumbering

The Deduction Settings group on the Update Remaining Salary/Deduction Amounts screen in the Payroll Encumbering program allows you to create sets of deductions and define encumbrance options for those sets.



These deduction sets and their accompanying encumbrance options are included when you process the update.

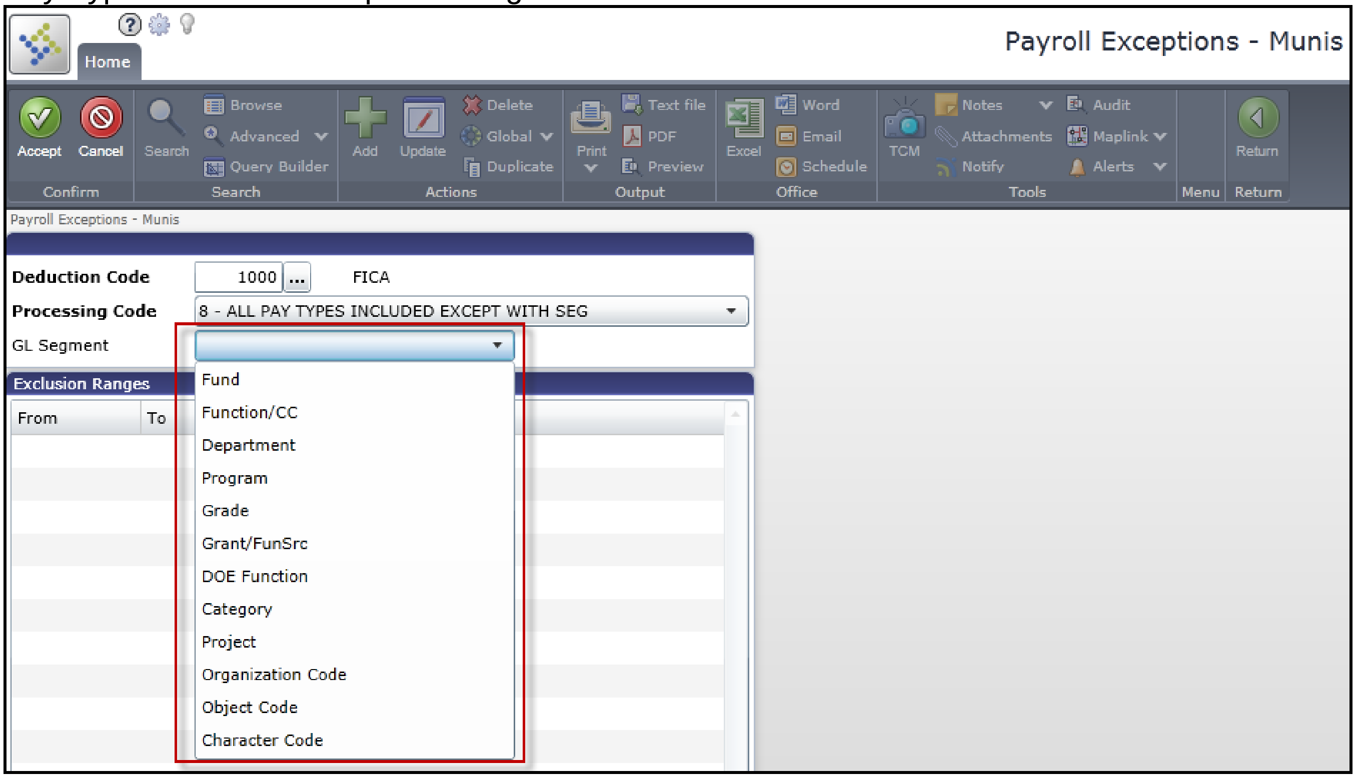
New exclusion options are included in the Payroll Encumbrances Proof/Post screen in the Payroll Encumbering program.



- The Exclude Inactive Employees check box excludes inactive employees from the encumbrance posting.
- The Exclude Inactive Pays check box excludes inactive pays from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive pays to exclude. The following options are available:
    - Inactive By Date
    - Inactive By Status
    - Inactive By Both
- The Exclude Inactive Deductions check box excludes inactive deductions from the encumbrance posting. If you select this check box, you must select an option from the accompanying list to define which inactive deductions to exclude. The following options are available:
    - Inactive By Date
    - Inactive By Status
    - Inactive By Both

Payroll Exceptions

The GL Segment list is available when you add a payroll exclusion with processing code 8 - All Pay Types Included Except with Seg.



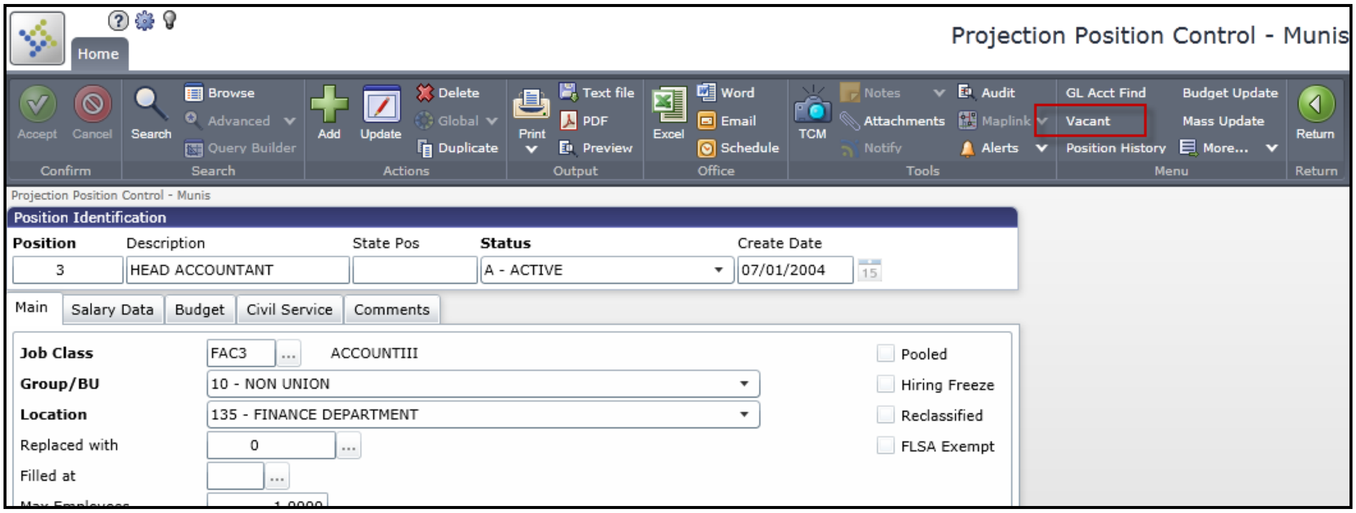
Select a GL Segment type from this list and then use the Exclusion Ranges fields to define the codes to exclude. For instance, if you select the Object Code option from the GL Segment list, then define ranges of Object Codes in the Exclusion Ranges fields.

Salary and Benefit Projections

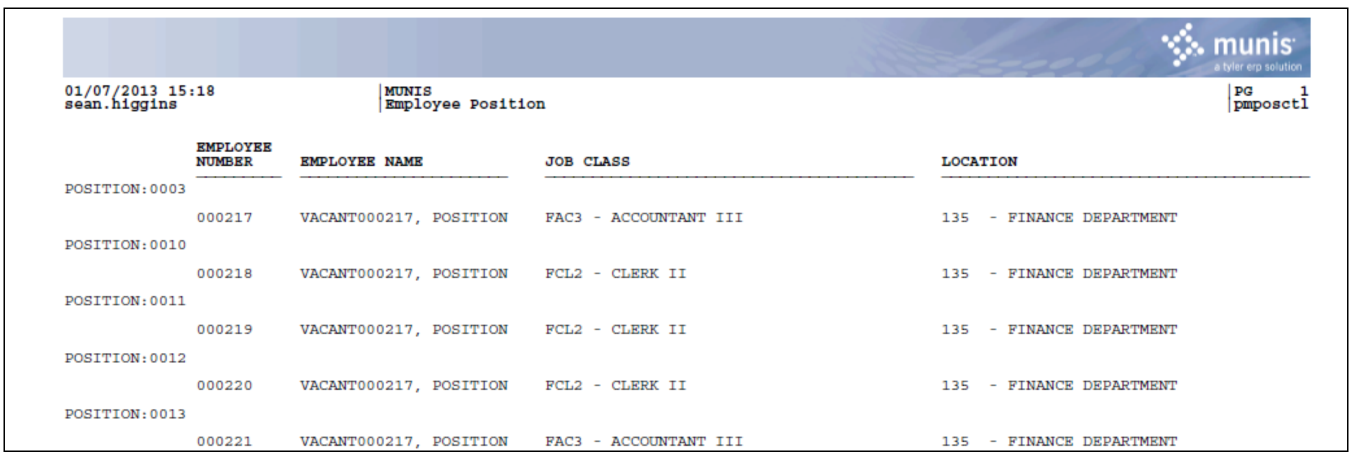
The following changes apply to Munis Salary and Benefit Projections programs.

Projection Position Control

The Vacant process in Projections Position Control generates a proof report.



This report indicates the number of employees created as part of the process and the positions for which they are created.



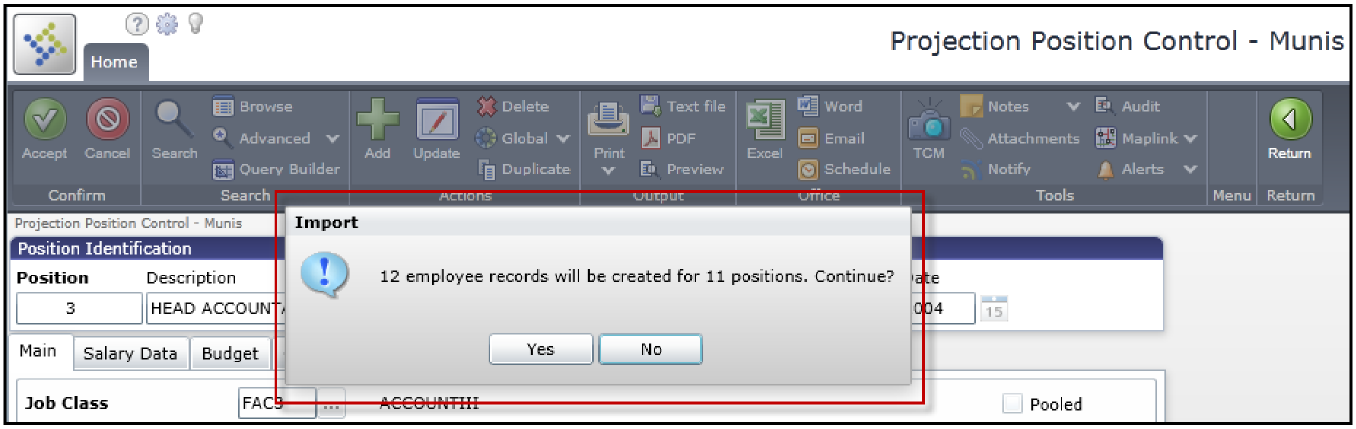
01/07/2013 15:18
sean.higgins

MUNIS
Employee Position

PG 1
pmposctl

	EMPLOYEE NUMBER	EMPLOYEE NAME	JOB CLASS	LOCATION
POSITION:0003				
	000217	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT
POSITION:0010				
	000218	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0011				
	000219	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0012				
	000220	VACANT000217, POSITION	FCL2 - CLERK II	135 - FINANCE DEPARTMENT
POSITION:0013				
	000221	VACANT000217, POSITION	FAC3 - ACCOUNTANT III	135 - FINANCE DEPARTMENT

The program also displays a dialog box that offers you the option of completing or canceling the operation.


Projection Position Control - Munis
Home
Accept
Cancel
Confirm
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Menu
Return
Position Identification
Position
Description
3
HEAD ACCOUNT
Main
Salary Data
Budget
Job Class
FAC5
ACCOUNTIII
Pooled
Import
12 employee records will be created for 11 positions. Continue?
Yes
No

Munis Central Programs

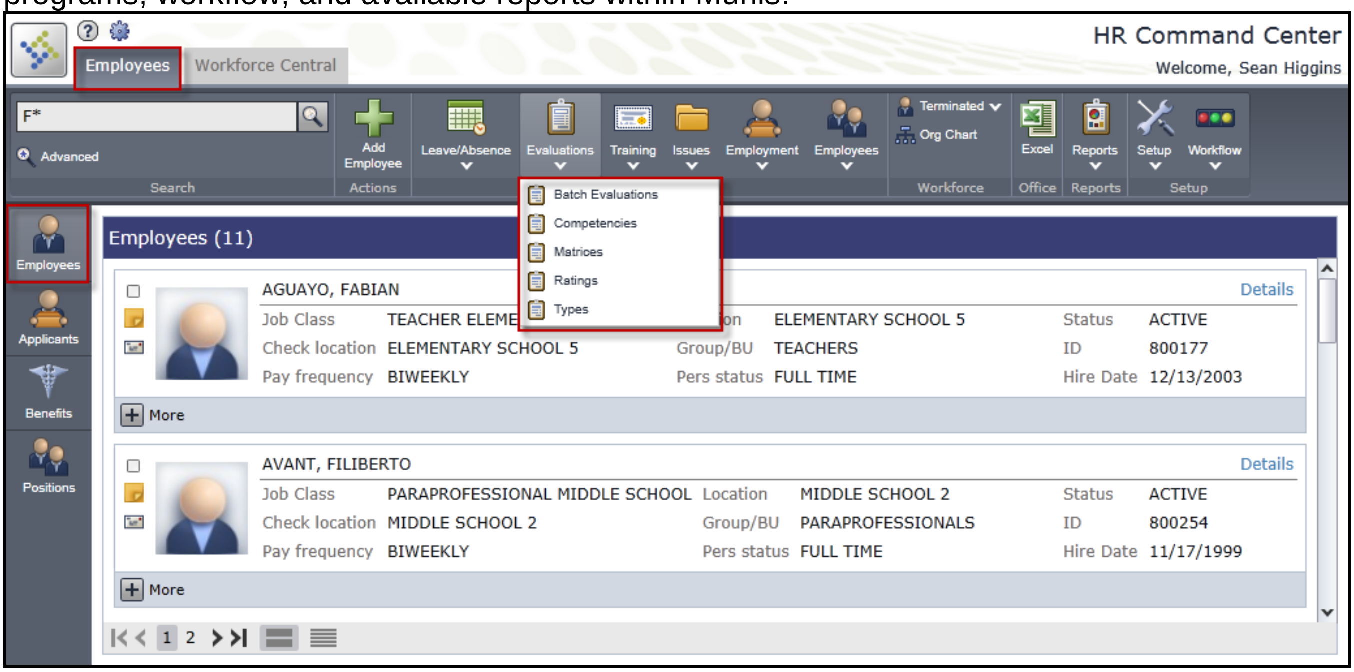
Munis central programs are available from Other Applications menu within Munis. The Centrals menu is organized by product: Financials, HR/Payroll, Revenues, and Administration. The following are HR/Payroll central program enhancements included with Munis Version 10.3.

Important! The Central search programs cap search results at 1000 records. The programs do not provide a message or other indicator when the maximum number of records is reached.

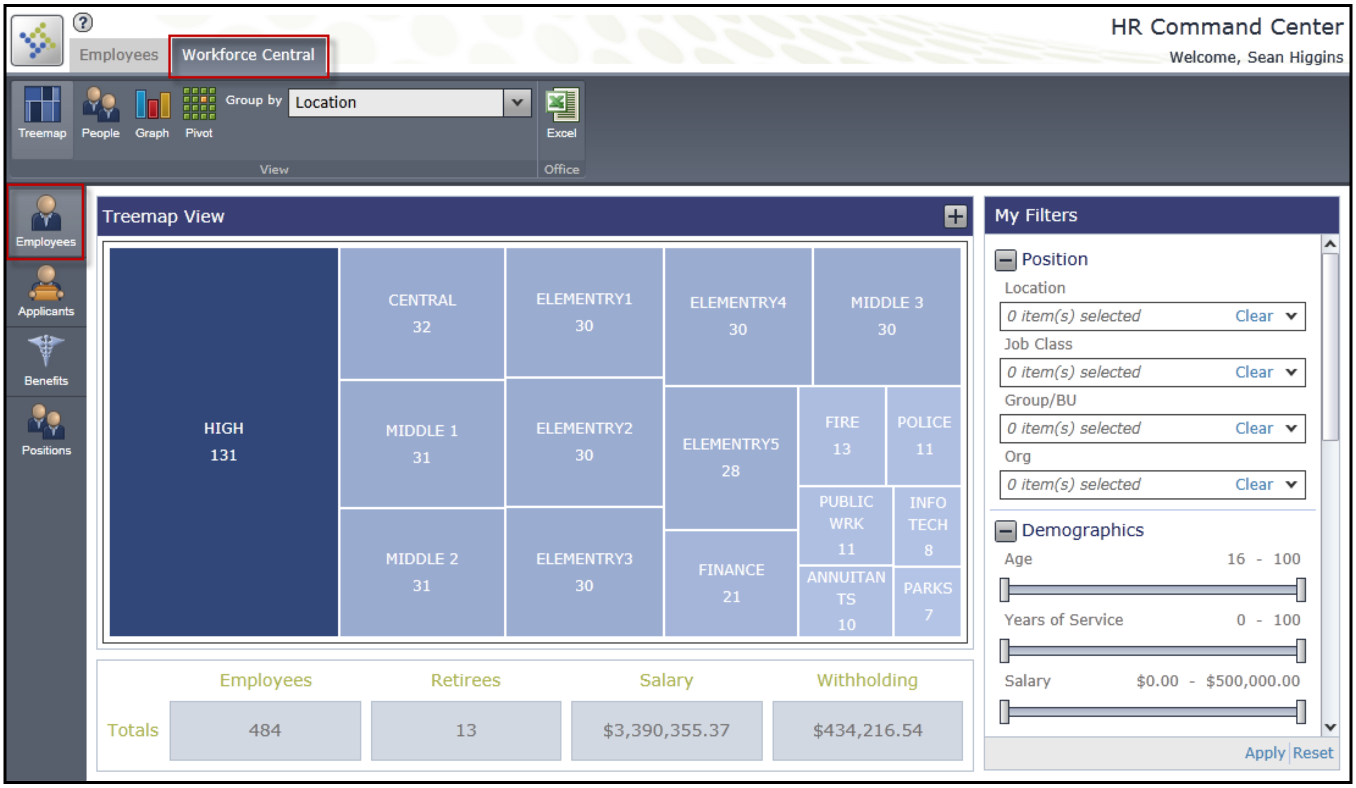
HR Command Center

The Human Resources (HR) Command Center provides a centralized interface for the personnel management central programs. Permissions for the individual programs included in the command center remain as defined for those programs in Munis. The menu options on the left display the Employees, Applicants, Benefits, and Positions panes. For each pane, the ribbon provides options for viewing and maintaining associated data.

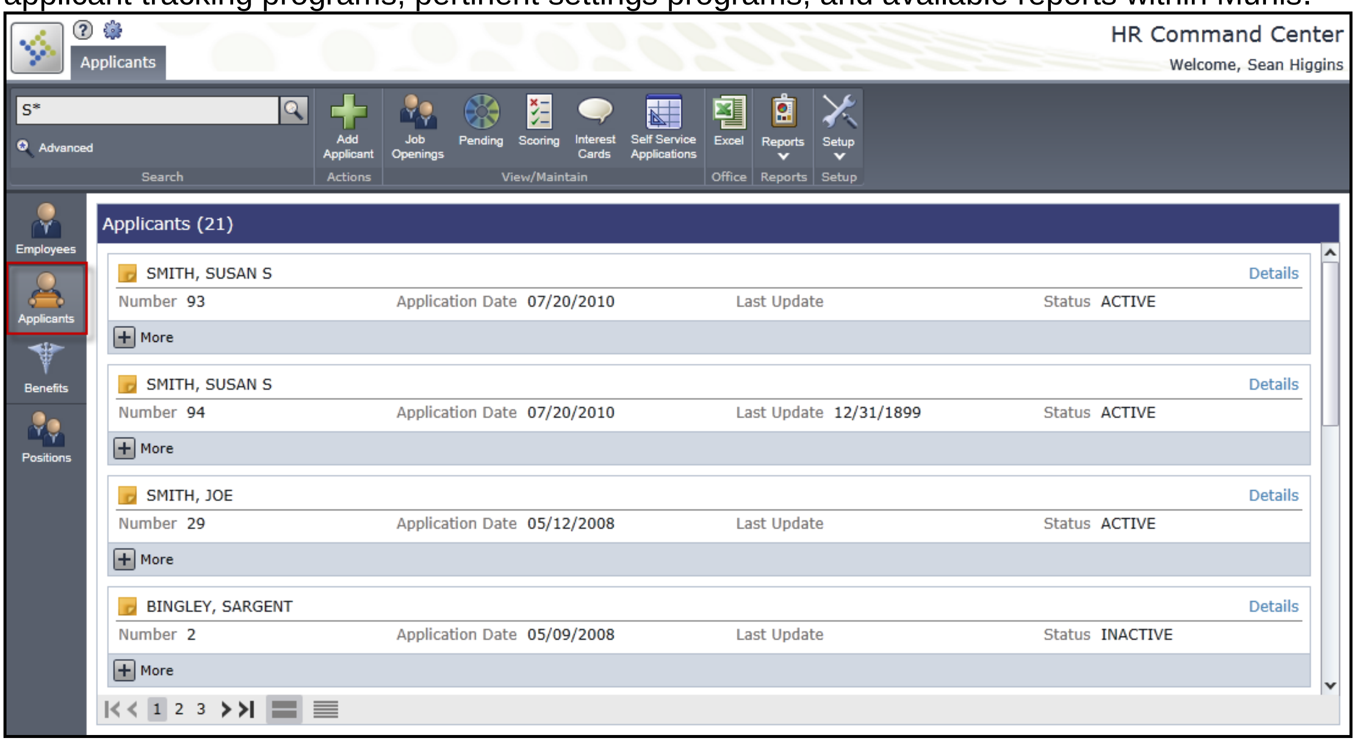
The Employees pane provides general employee data in two views, which can be accessed using the tabs on the ribbon. The Employees view interfaces with the Employee Central program. The options provide direct access to employee programs, pertinent settings programs, workflow, and available reports within Munis.



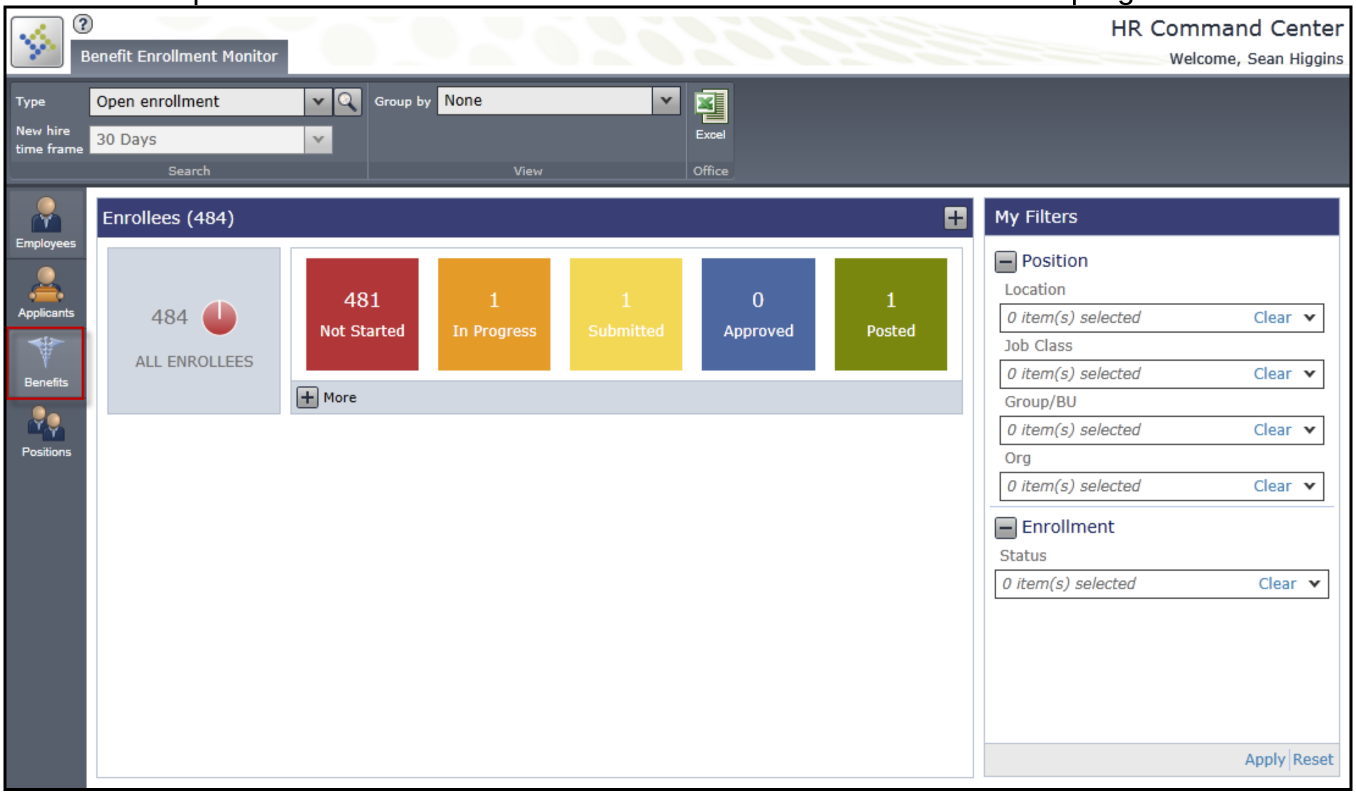
The Workforce Central view is an interface for the Workforce Central program.



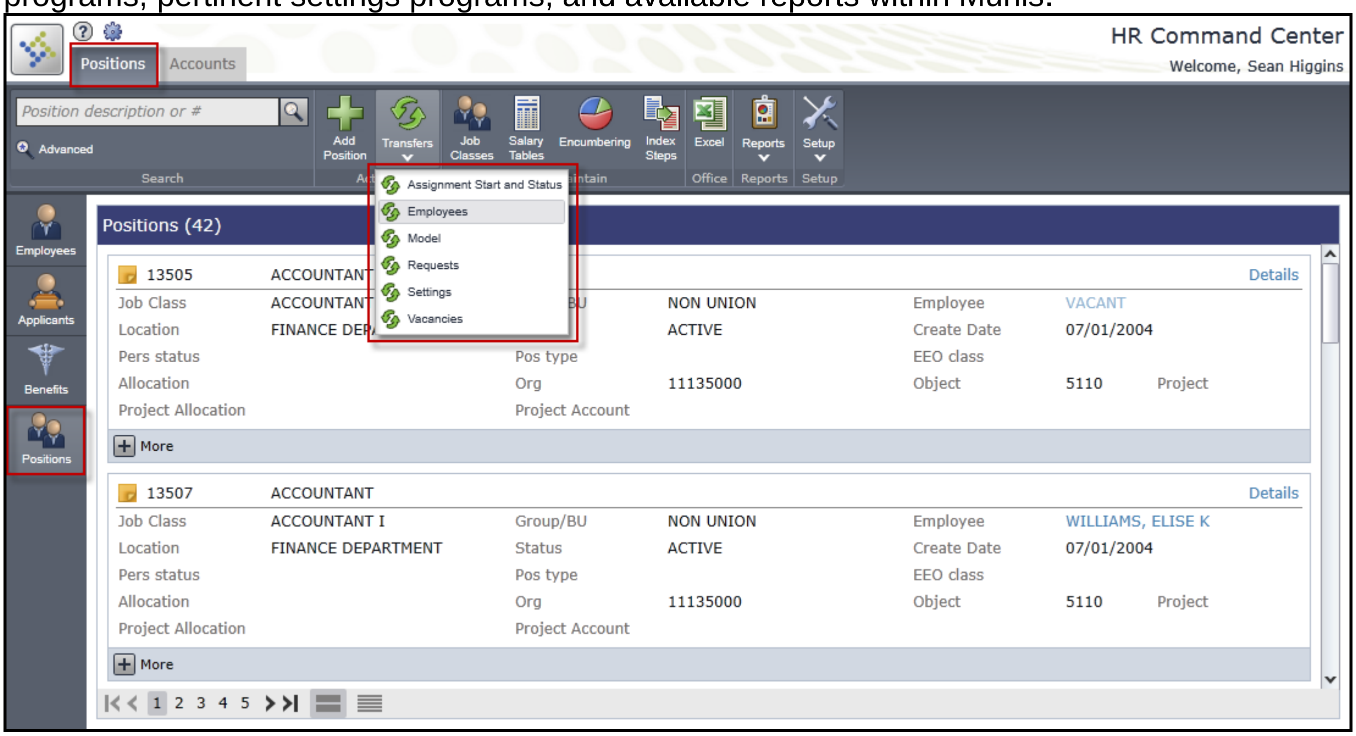
The Applicants pane interfaces with the Applicant Review central program. The options link to applicant tracking programs, pertinent settings programs, and available reports within Munis.



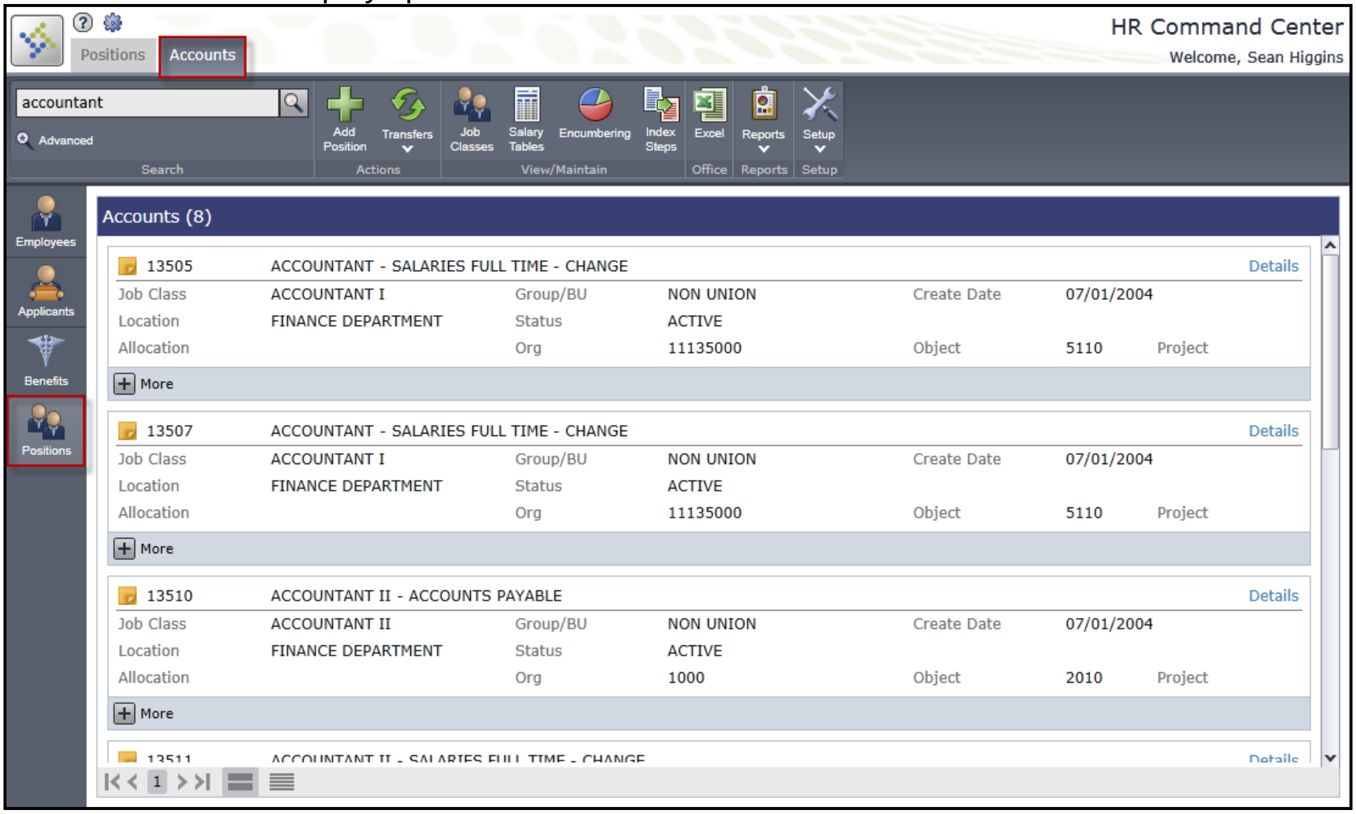
The Benefits pane is an interface for the Benefit Enrollment Monitor central program.



The Positions pane interfaces with the Position Control Central program, which displays in two primary views accessible using the tabs on the ribbon. The Positions view includes position control data organized by position record. The options provide direct access to position control programs, pertinent settings programs, and available reports within Munis.

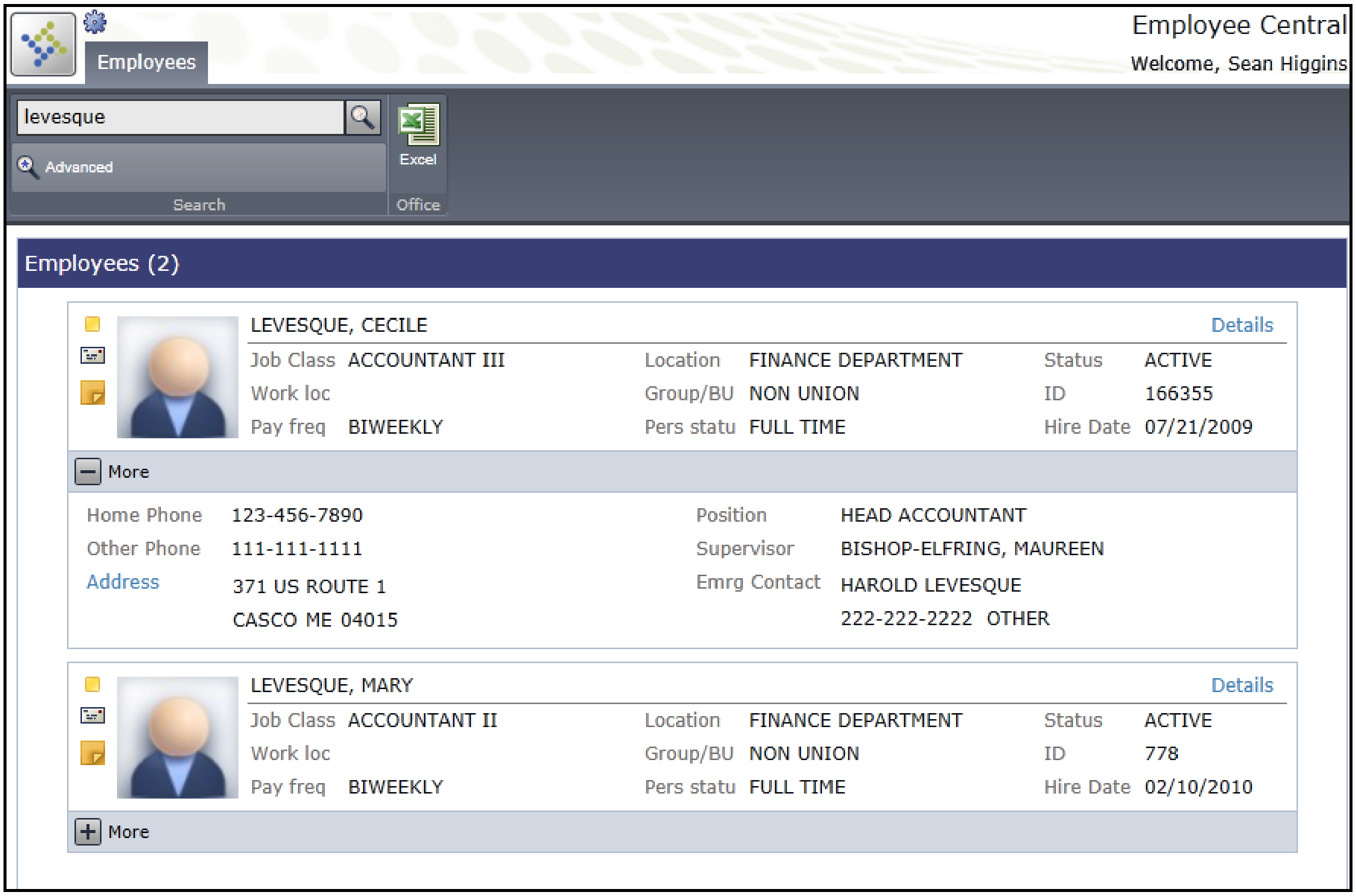


The Accounts view displays position account records.

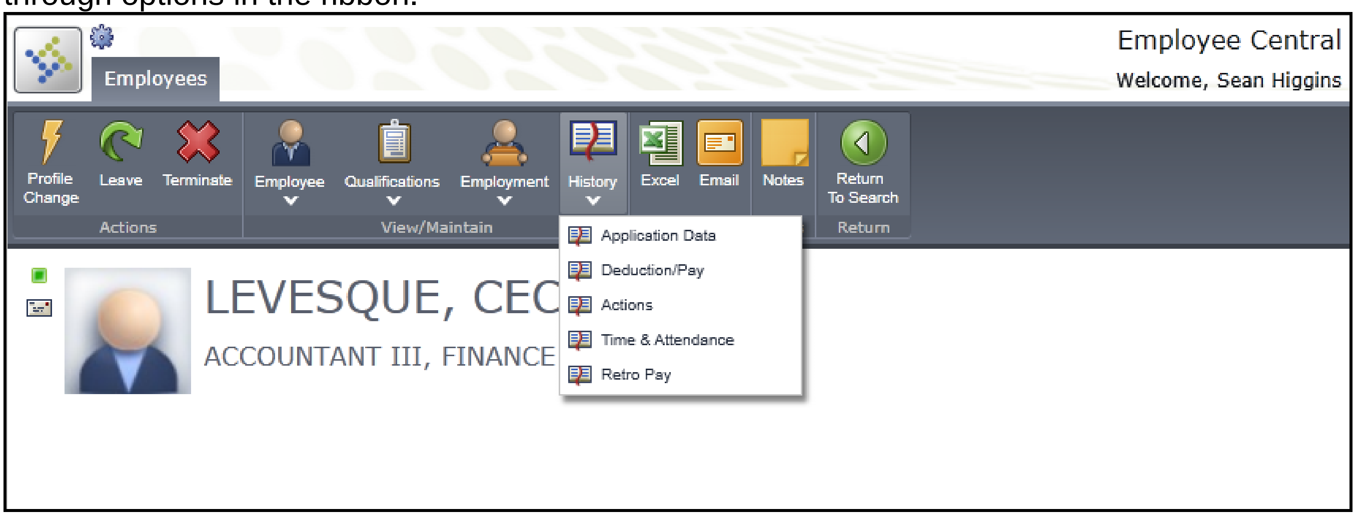


Central Program Design

Central programs are updated to improve usability and readability. For example, in the Employee Central program, when a search returns multiple results, the program lists each result in a larger format with an expandable information section at the bottom.



When you select the Details option, the program displays the employee's detail page, which displays the employee header in a larger format and provides access to additional information through options in the ribbon.



Available Web Parts

Web parts are web-based portals that display information from various Tyler organizations or provide links to third-party applications. The following table provides a description of web parts available in Munis Version 10.3 for the Tyler Dashboard and Munis tenants.

Web Part	Description
Tyler Dashboard	
My Tyler Community	Provides direct access to Tyler Community items such as forums, conversations, and groups.
Munis	
eLearning Links	Provides a catalog of available Munis eLearning tutorials; when you click a tutorial link, the tutorial opens in a window outside of the Tyler Dashboard.

Human Resources and Payroll for Version 10.4

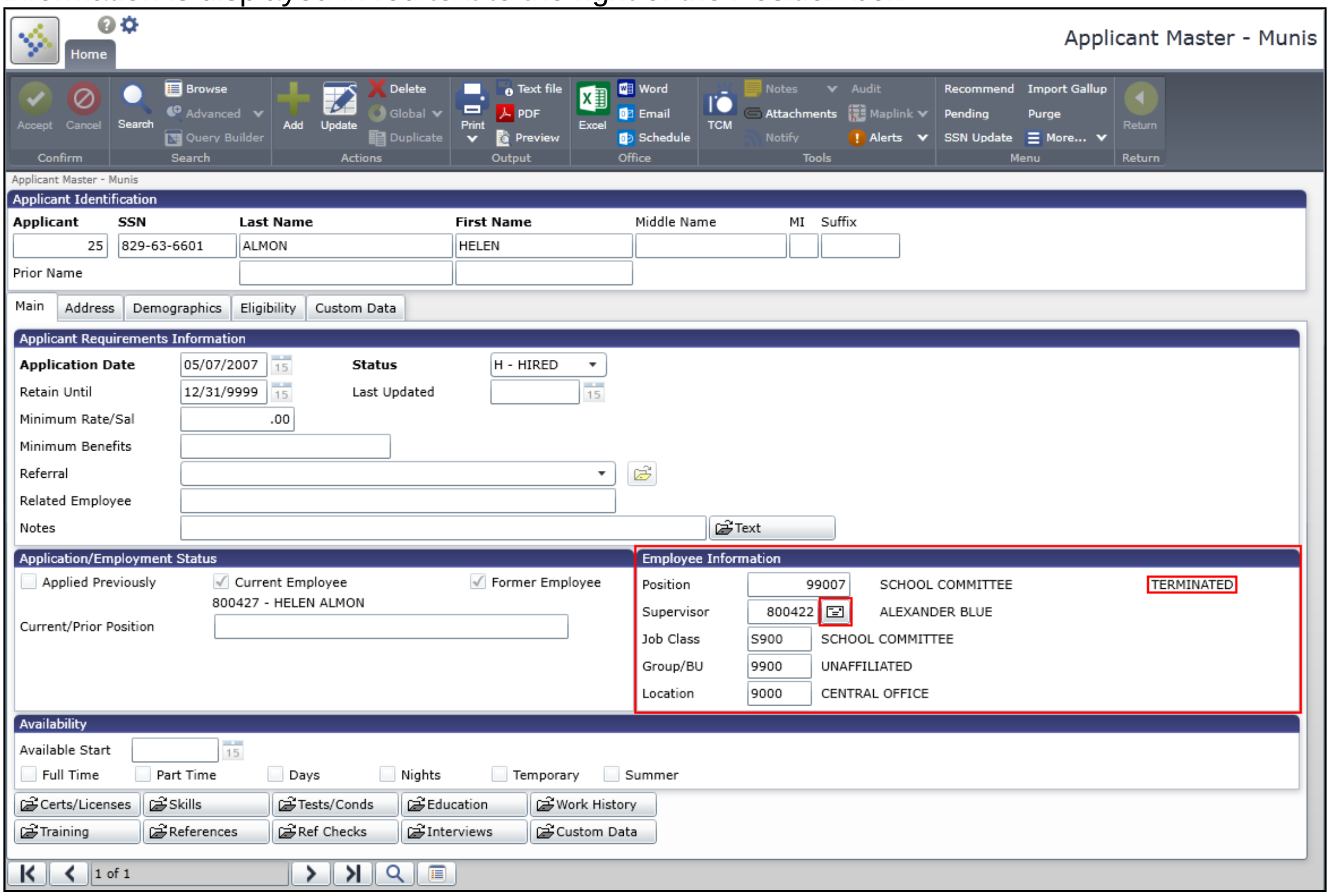
This document provides an overview of the major HR/Payroll enhancements for Munis Version 10.4.

Human Resources for Version 10.4

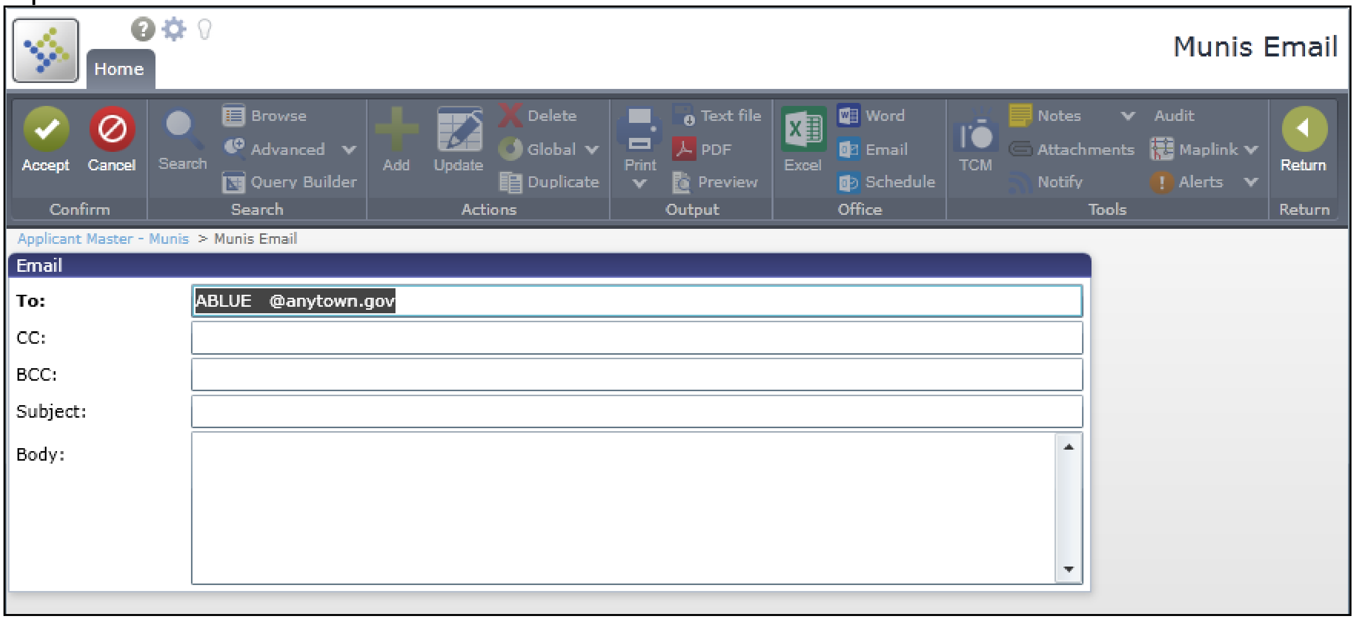
The following changes apply to Munis Human Resources programs.

Applicant Master

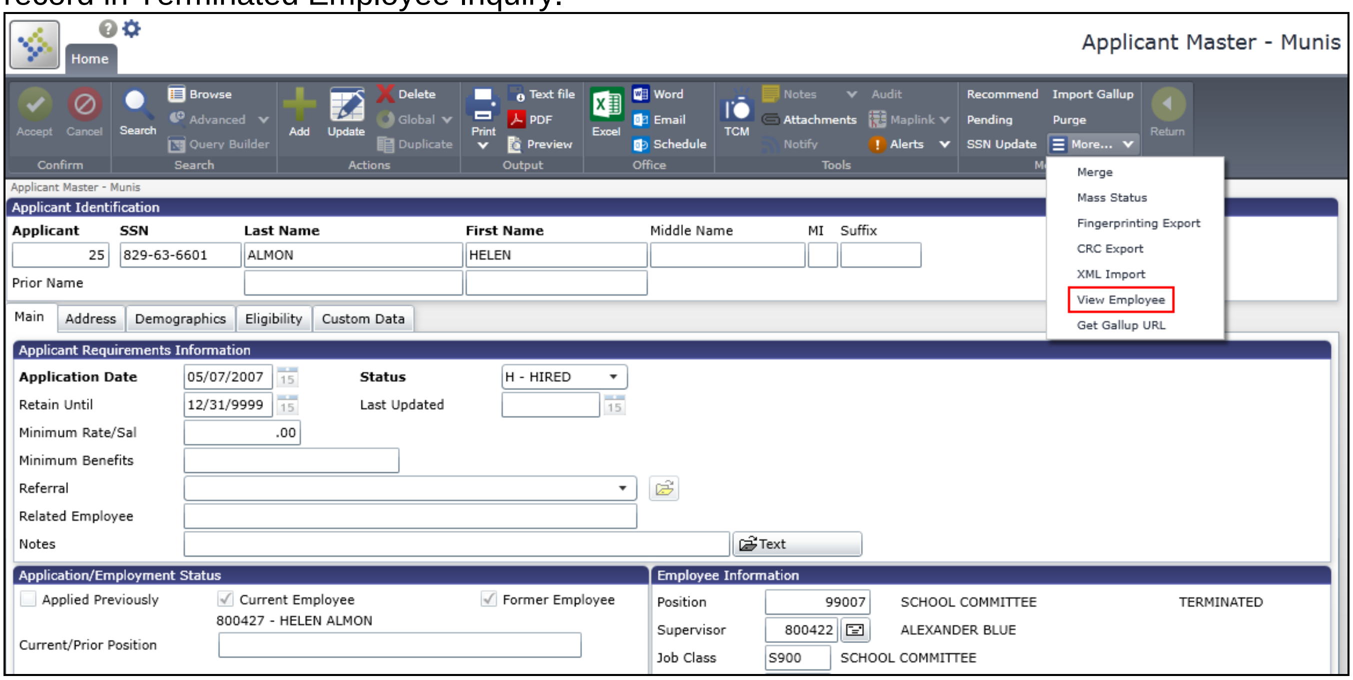
The Employee Information group on the Main tab in Applicant Master provides information regarding the applicant's current or previous position with your organization, if one exists. If you have the proper permissions, the group displays information including the position's number, supervisor, and location. If the applicant was terminated from that position, this information is displayed in red text to the right of the Position box.



If the supervisor listed has an email address recorded in Munis, click the email button to open a pre-addressed email.



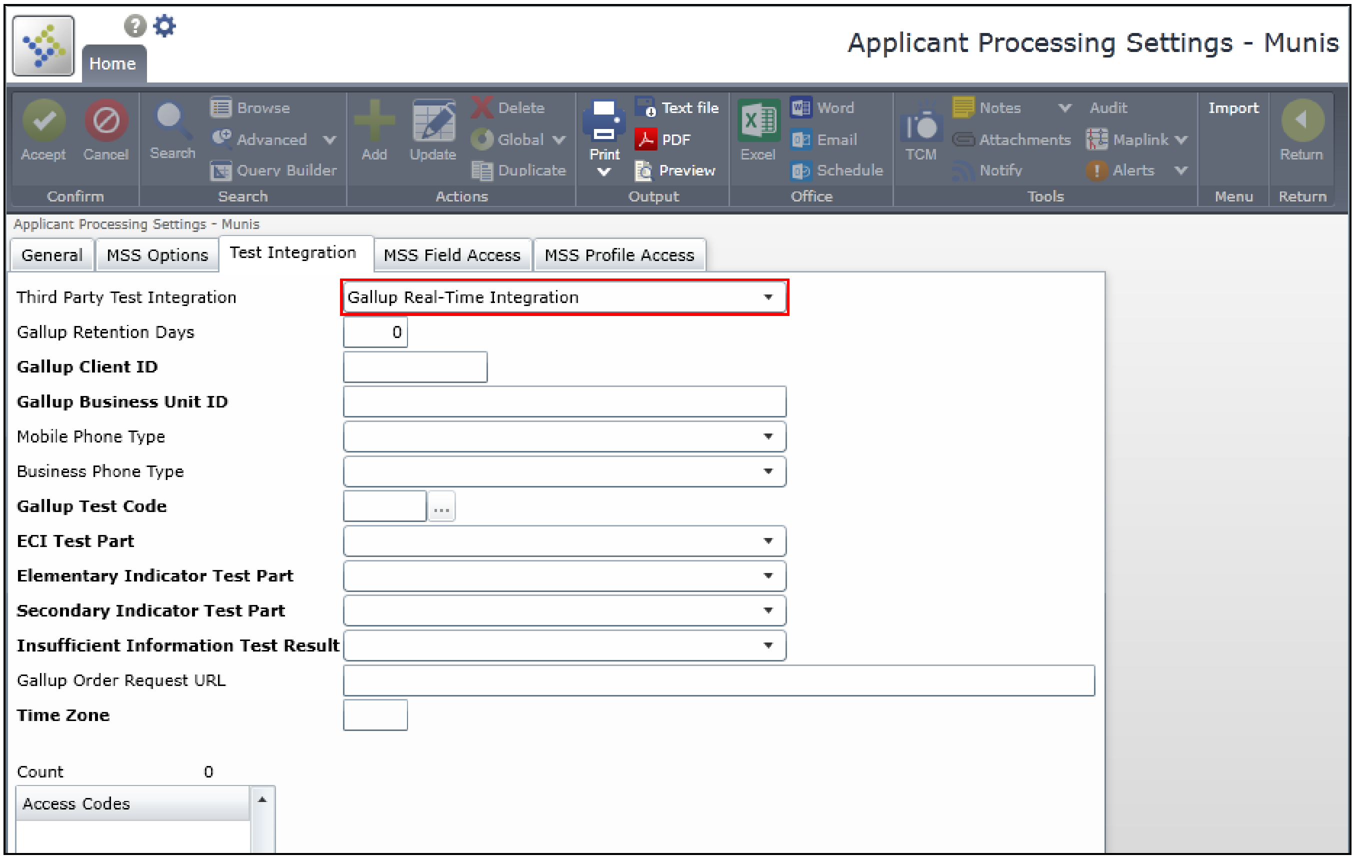
If you have the necessary permissions, click View Employee to display the active applicant's record in Employee Inquiry. If the applicant was terminated, this button displays his or her record in Terminated Employee Inquiry.



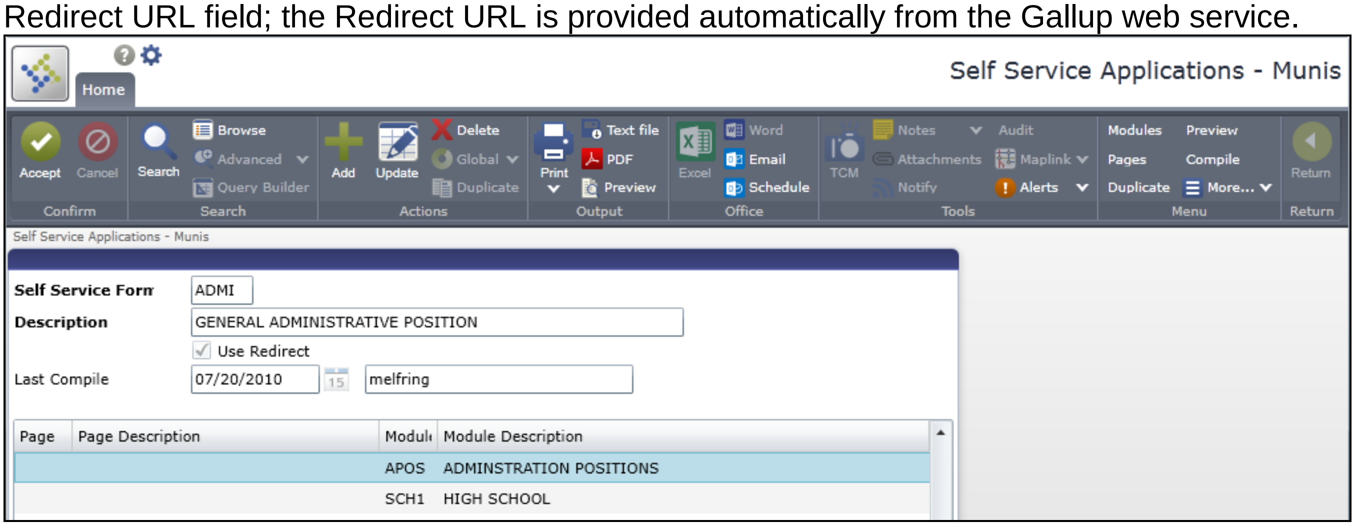
Applicant Processing

The Applicant Processing programs have been expanded to include functionality for real-time integration with Gallup.

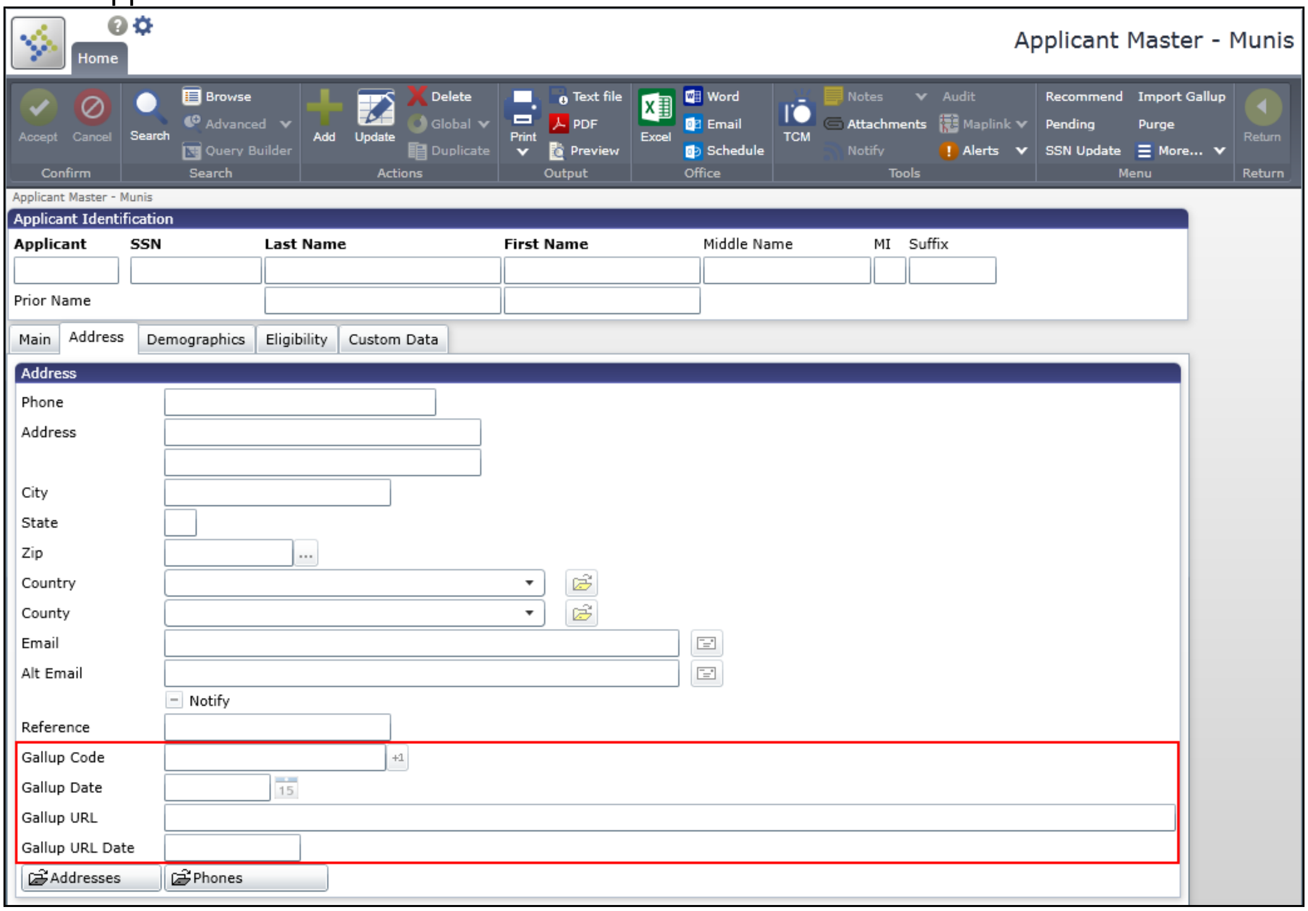
In Applicant Processing Settings, the Gallup Folder tab has been renamed Test Integration. When you select Gallup Real-Time Integration from the Third Party Test Integration list, the program displays options for configuring an automated process that imports Gallup data into Munis in real time.



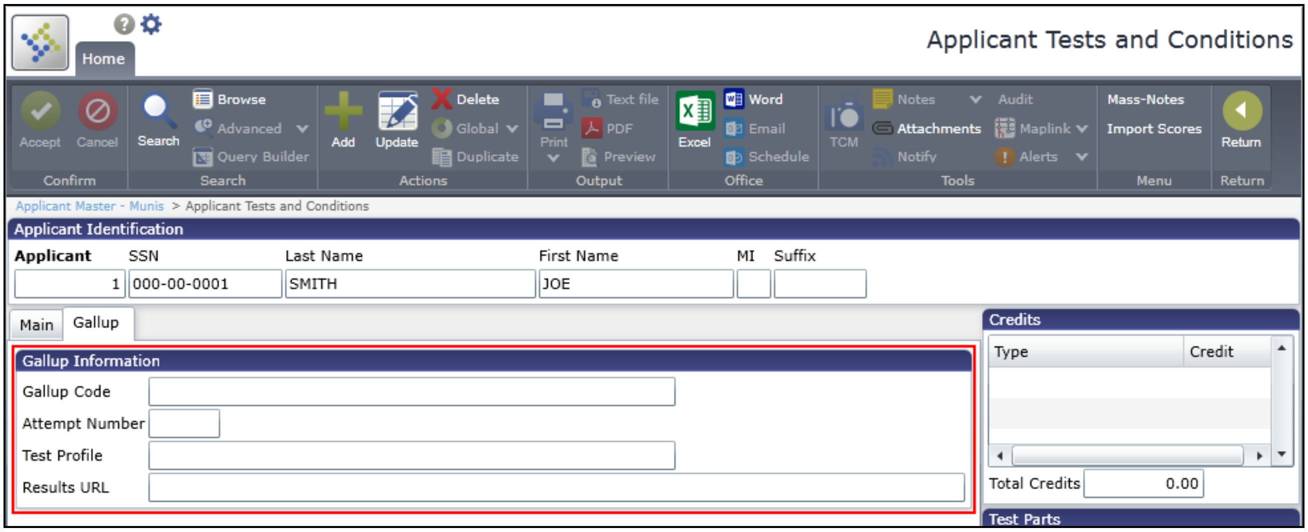
When you set up Gallup real-time integration, the Self Service Applications program automatically selects the Use Redirect box, which configures the system to redirect applicants to a Gallup interview URL after completing their applications. The program does not display the Redirect URL field; the Redirect URL is provided automatically from the Gallup web service.



The Address tab in Applicant Master displays Gallup information for the applicant, including The Gallup URL box, which displays the URL provided to the active applicant for accessing the Gallup interview. The Gallup URL Date box identifies the date on which the URL was supplied to the applicant.

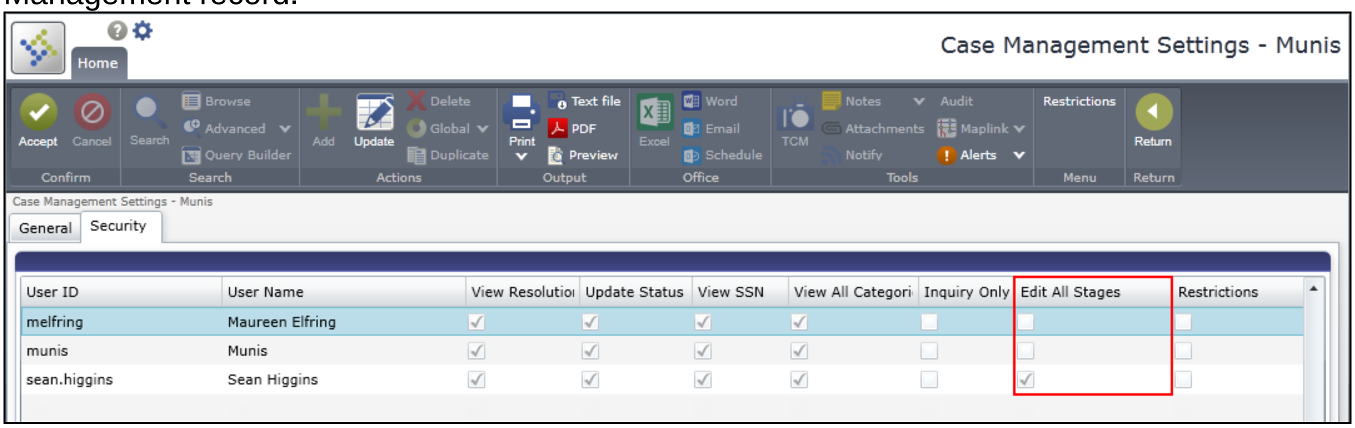


On the Applicant Tests and Conditions screen in Applicant Master, the Gallup tab displays information regarding the applicant's test, including the Gallup code and a URL for viewing detailed results.

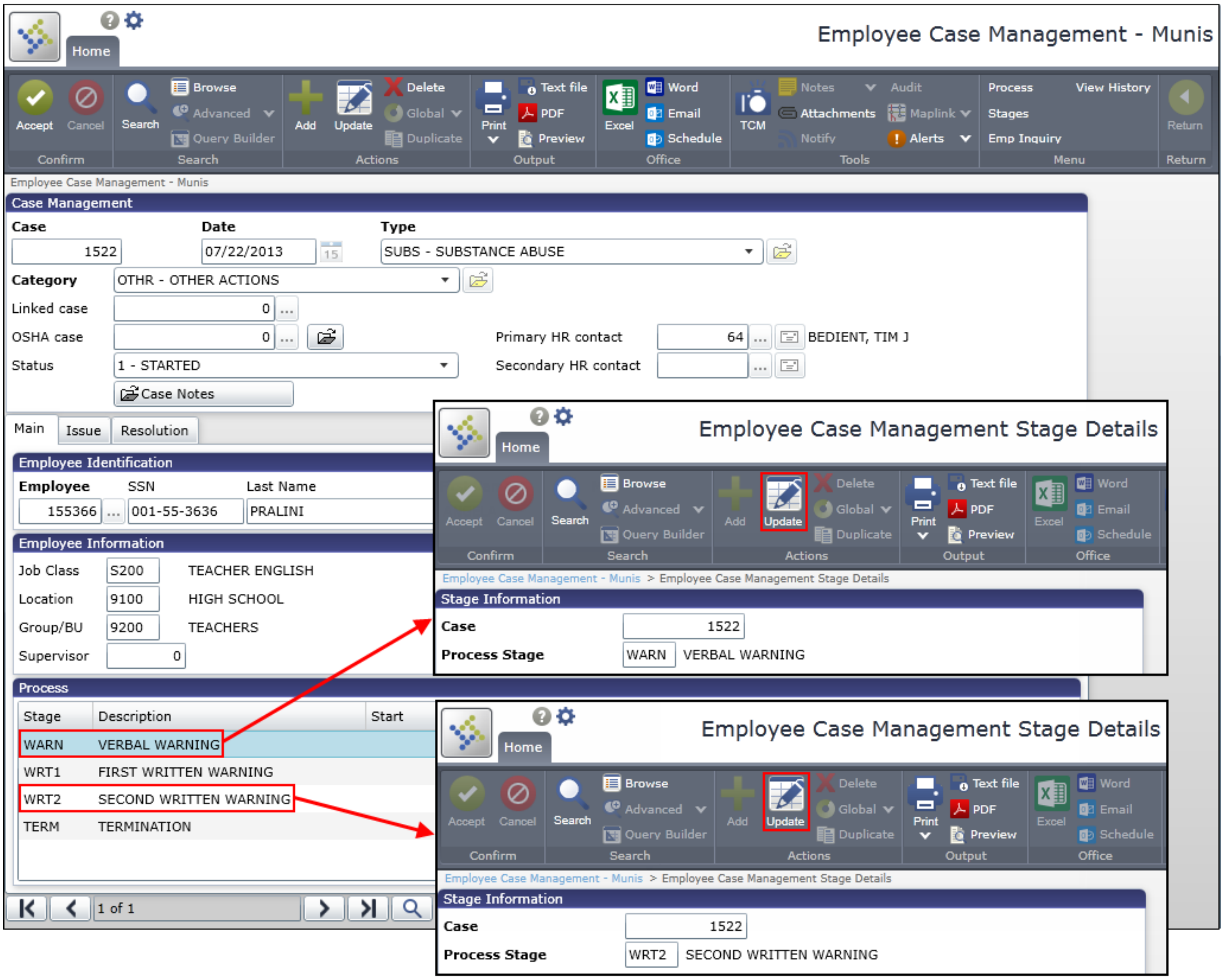


Case Management Settings

The Edit All Stages permission on the Security tab in the Case Management Settings program allows you to update case management stages out of sequence on an Employee Case Management record.



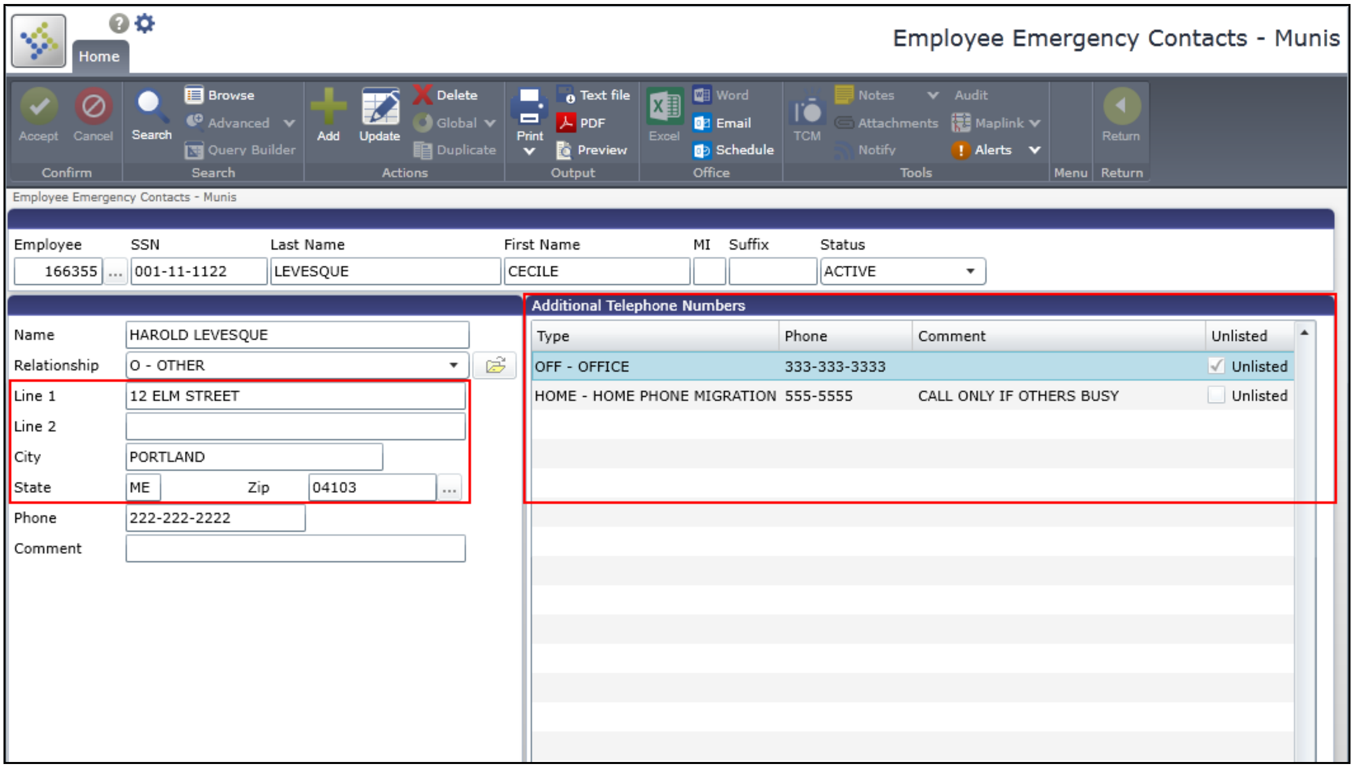
If you have been granted this permission, you can update any stage of a case in the Case Management program at any point in the process.



This permission is not granted by default and does not affect other case management permissions.

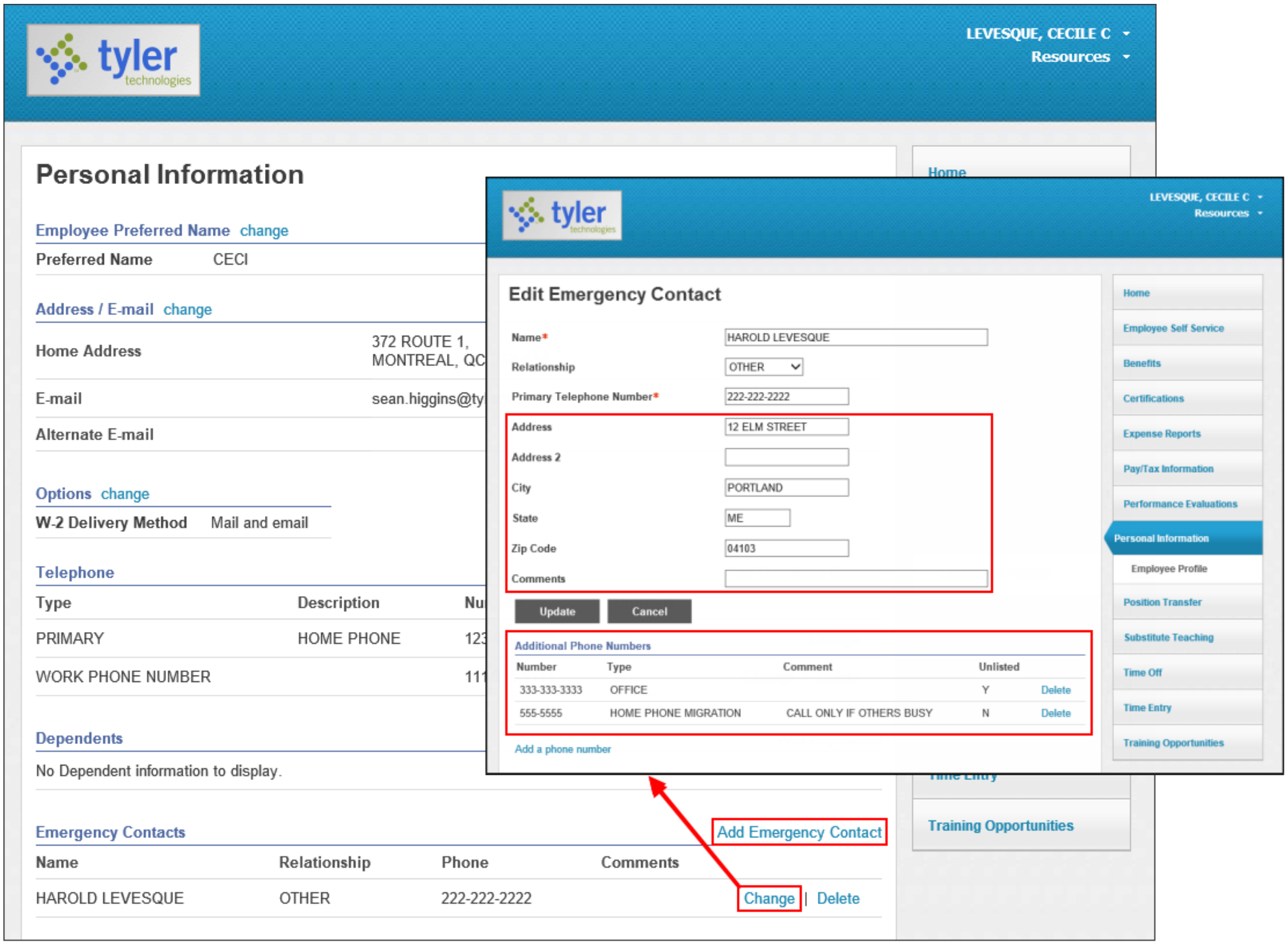
Employee Emergency Contacts

The Line 1, Line 2, City, State, and Zip fields in Employee Emergency Contacts identify the address of the active employee emergency contact.



The Additional Telephone Numbers fields define additional phone numbers for the contact and specify the number's type, whether it is unlisted, and additional comments, as necessary.

Click Change next to an emergency contact on the Personal Information page in Employee Self Service (ESS) to display the Edit Emergency Contact page, where you can update these fields.

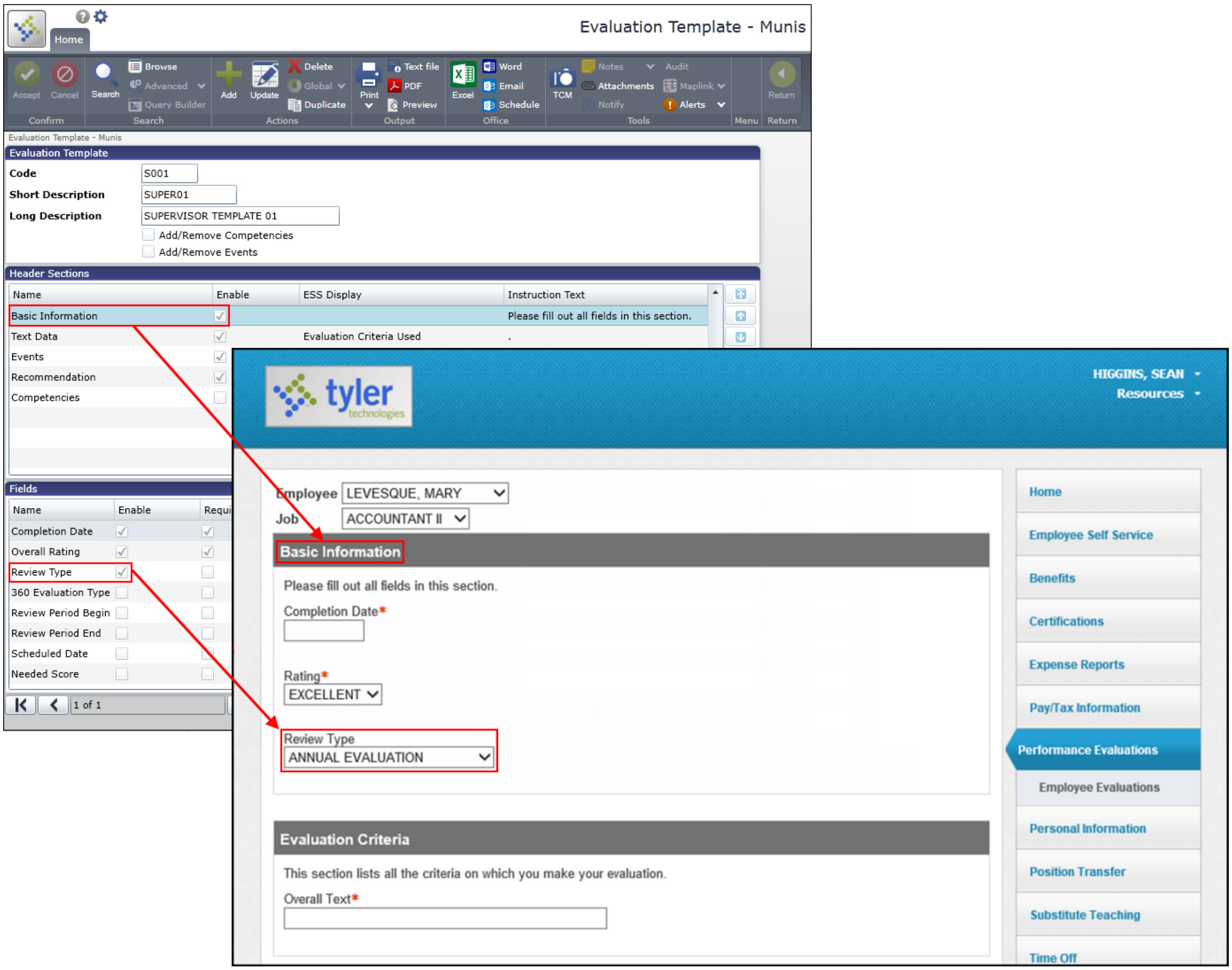


These fields are also available for entry when you select Add Emergency Contact to add a new contact.

Employee Evaluations

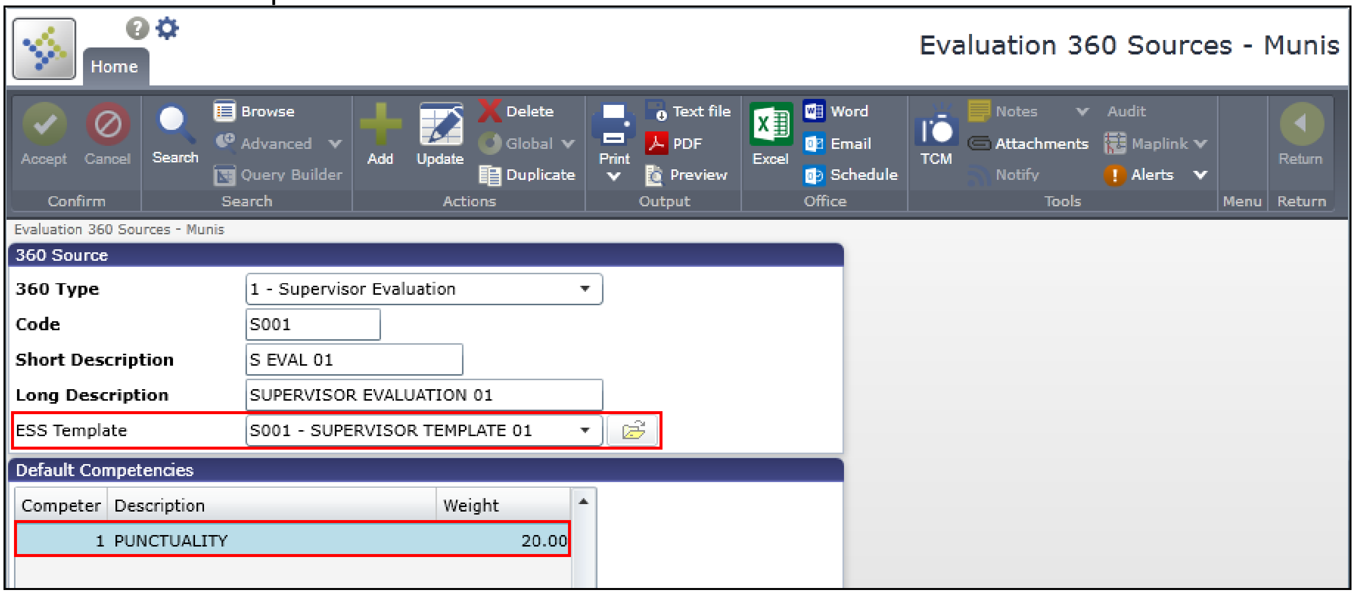
New programs are available for customizing ESS employee evaluation forms.

The Evaluation Template program creates and maintains evaluation templates. Select the Enable check box for any header section to include it on all evaluation forms generated from the active template. When you highlight a header section, the Fields group displays the fields that are available for inclusion in that section. Select the Enable check box for any field to include it, select Required to designate it as a required field.



You can further configure the headers and fields included on evaluations by defining display text, instructional text, and default options.

The Evaluation 360 Sources program creates and maintains evaluation source codes. Use these codes to customize the competencies included on different evaluation forms generated from the same template.

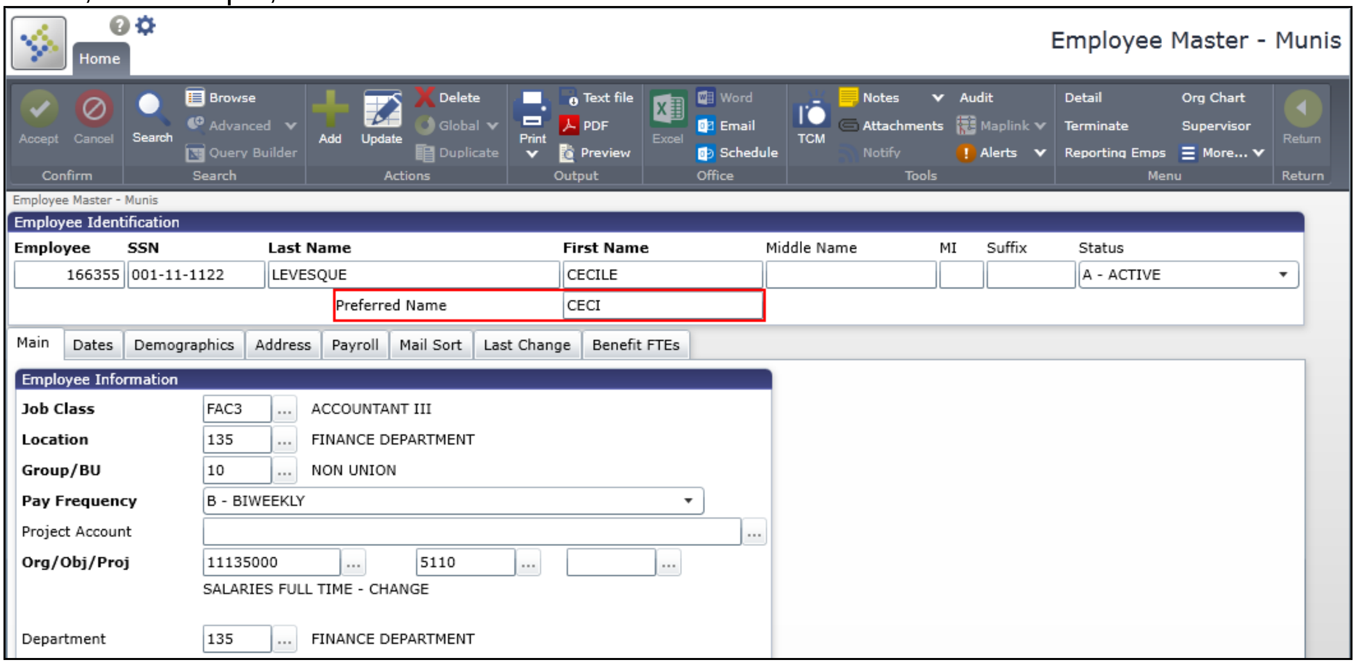


Use the ESS Template list to select a template to associate the evaluation source code with. You can associate as many source codes with a single template as necessary. Use the Default Competencies fields to define the competencies for the source code. You can create multiple evaluation forms from the same template by assigning different competencies to different source codes.

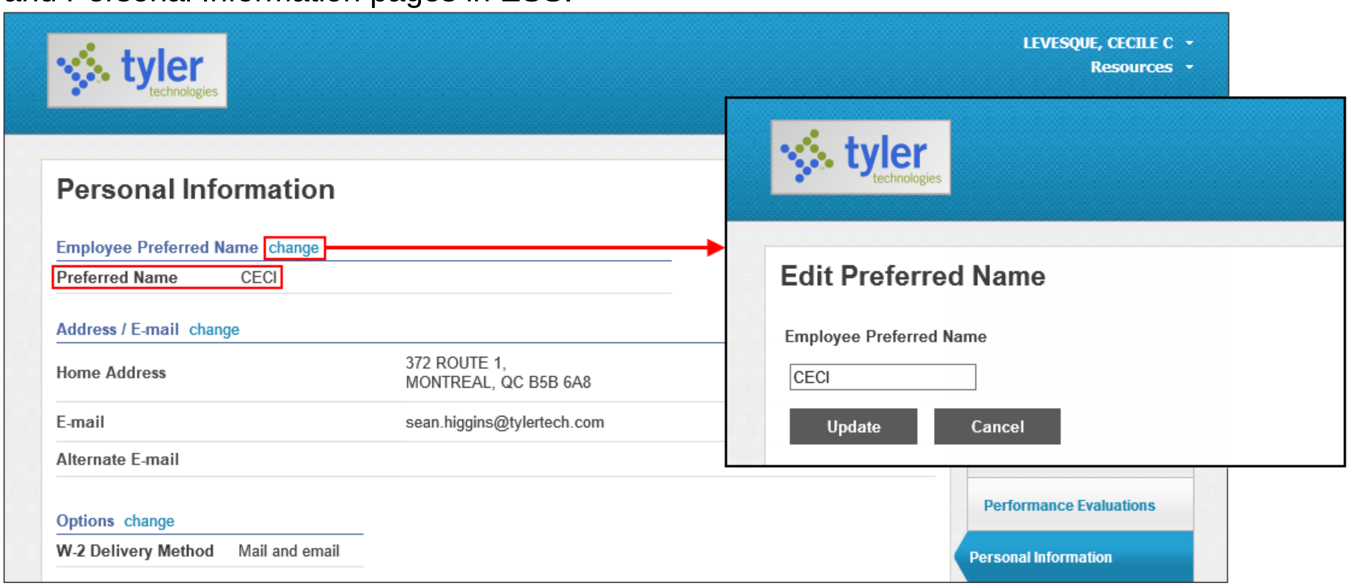
When you add an evaluation for an employee in ESS, the program checks the evaluation source code on the employee's job class and generates the evaluation form with the competencies and template defined on that source code.

Employee Master

The Preferred Name field in Employee Master identifies the active employee's preferred first name. Use this box if the employee prefers to be known by a name other than their legal name, for example, a nickname.



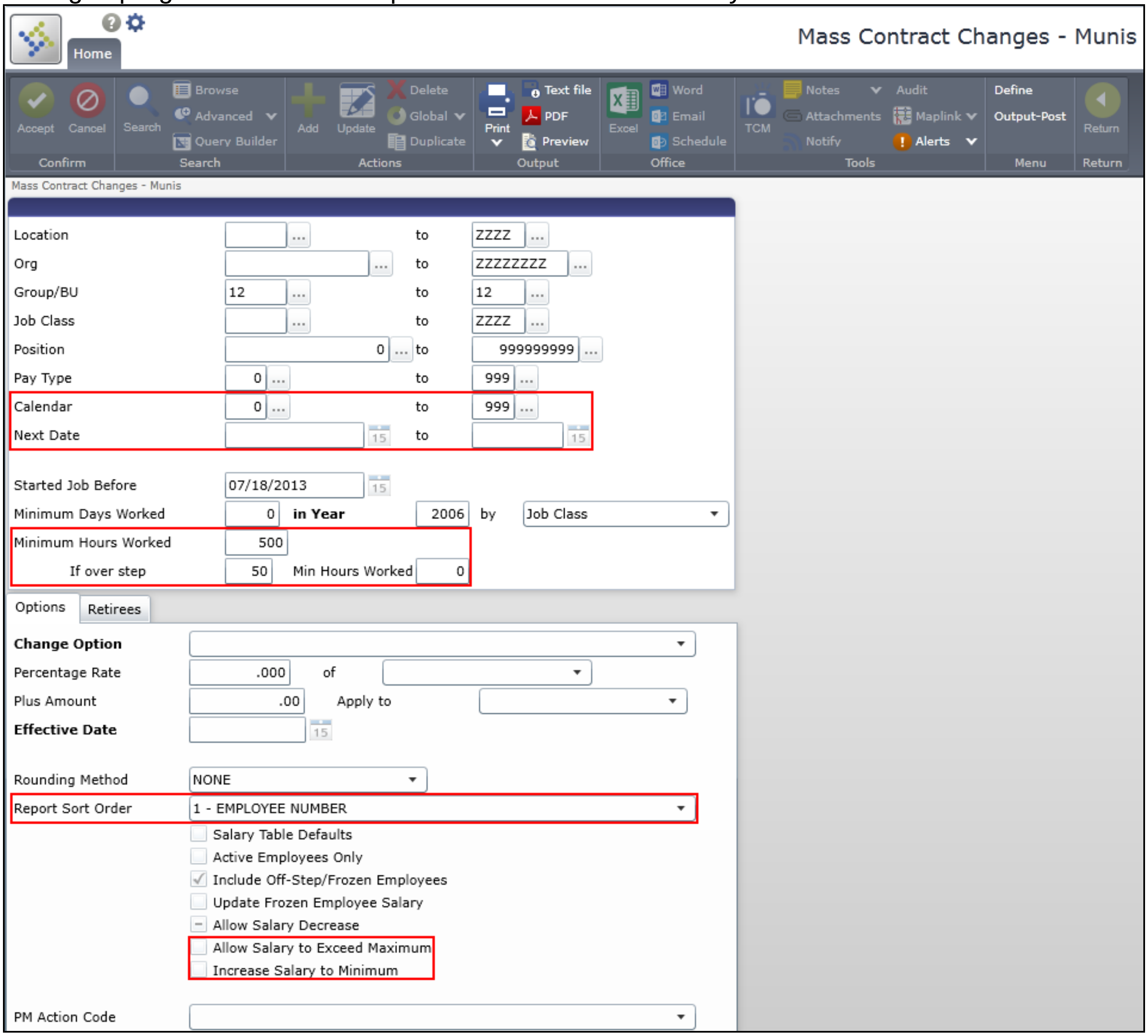
View the preferred name attached to your Employee Master record on the Employee Profile and Personal Information pages in ESS.



Click Change on the Personal Information page to display the Edit Preferred Name page, where you can enter a new preferred name.

Mass Salary Changes

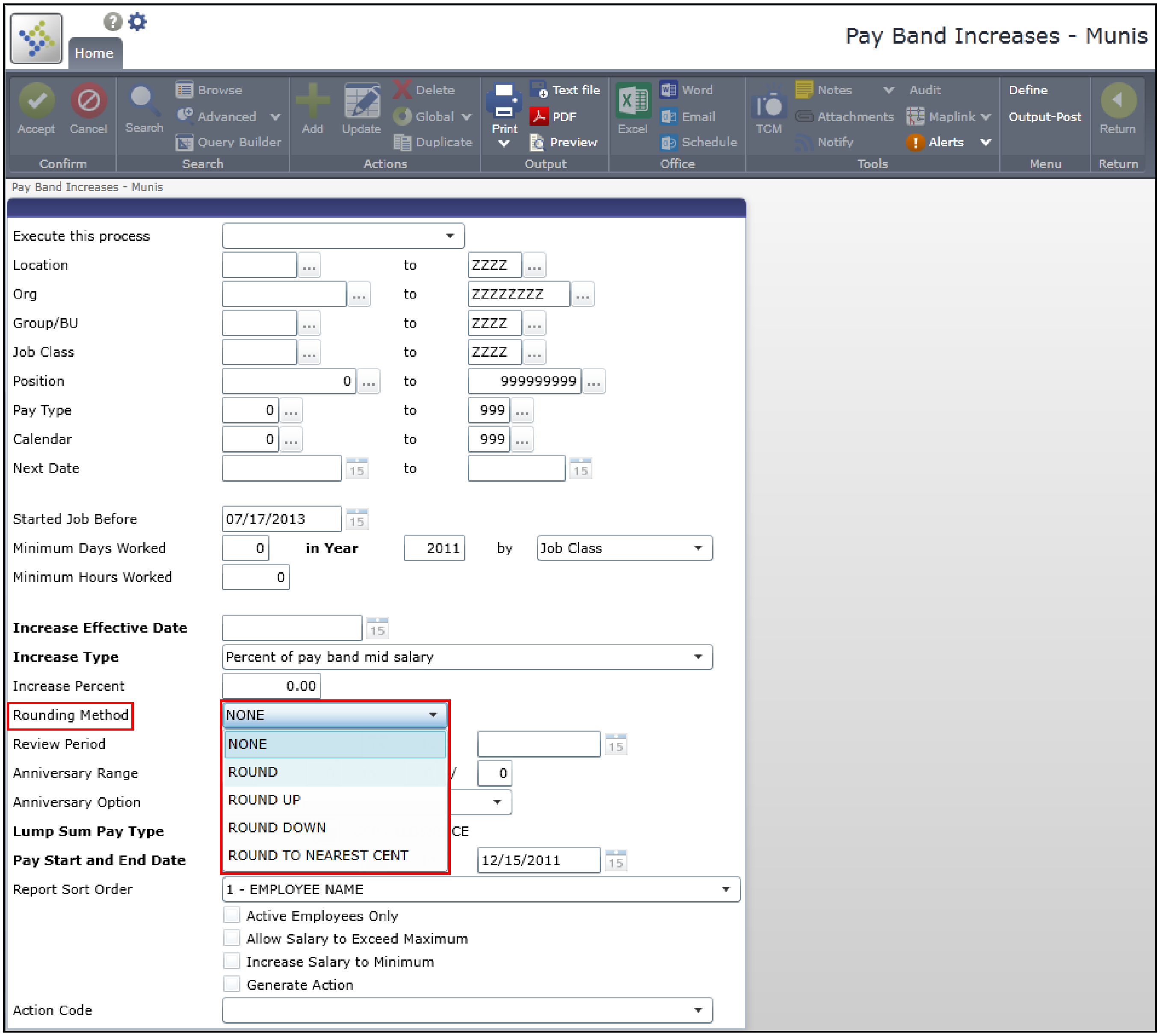
The generation options in the Pay Band Increases, Mass Step Increases, and Mass Contract Changes programs have been updated to ensure consistency.



- The Calendar, Next Date, and Minimum Hours Worked boxes are available in all three programs. Use these boxes to define the employee selection criteria for the increase.
- The If Over Step, and Min Hours worked boxes are available in the Mass Contract Changes and Mass Step Increases programs. Use these boxes to define the minimum number of hours employees over a specified step must have worked in order to be selected.
- The Allow Salary to Exceed Maximum and Increase Salary to Minimum options are available in the Pay Band Increases program and on the Options tab in Mass Contract Changes. Use these check boxes to define the salary calculation options for the increase.

- The Report Sort Order list is available in the Pay Band Increases program and on the options tab in the Mass Contract Changes program. Use this list to define the sorting order for the proof report.

The Pay Band Increases program includes a new calculation option. The Rounding Method list specifies the rounding method for the program to use when calculating amounts during a pay band increase.

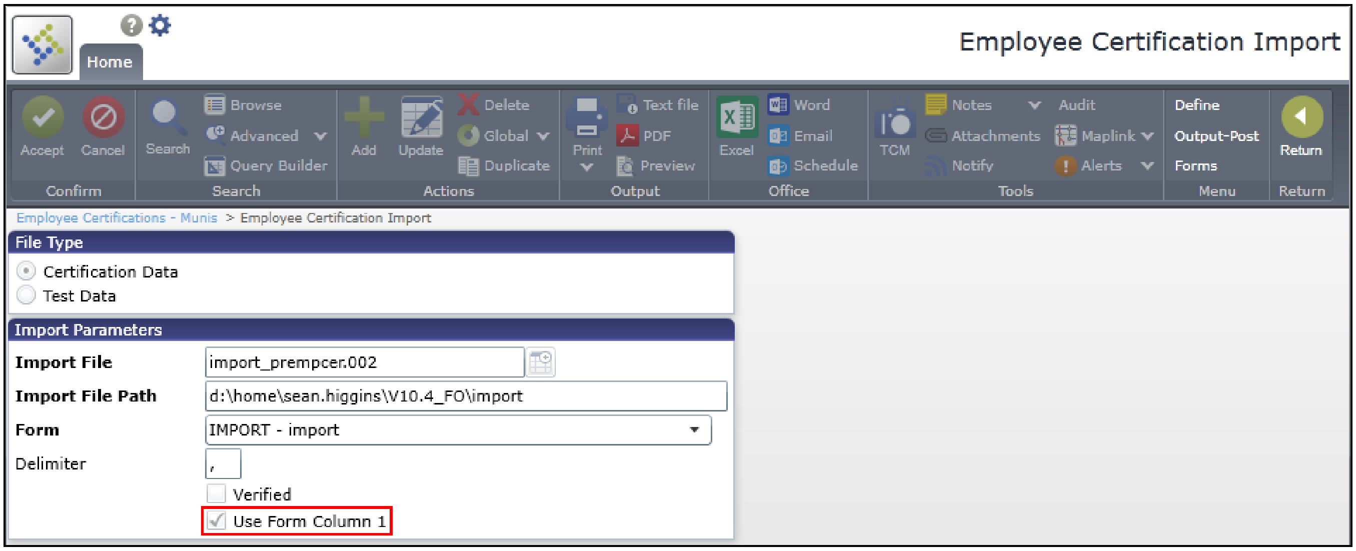


Employee Certification Options

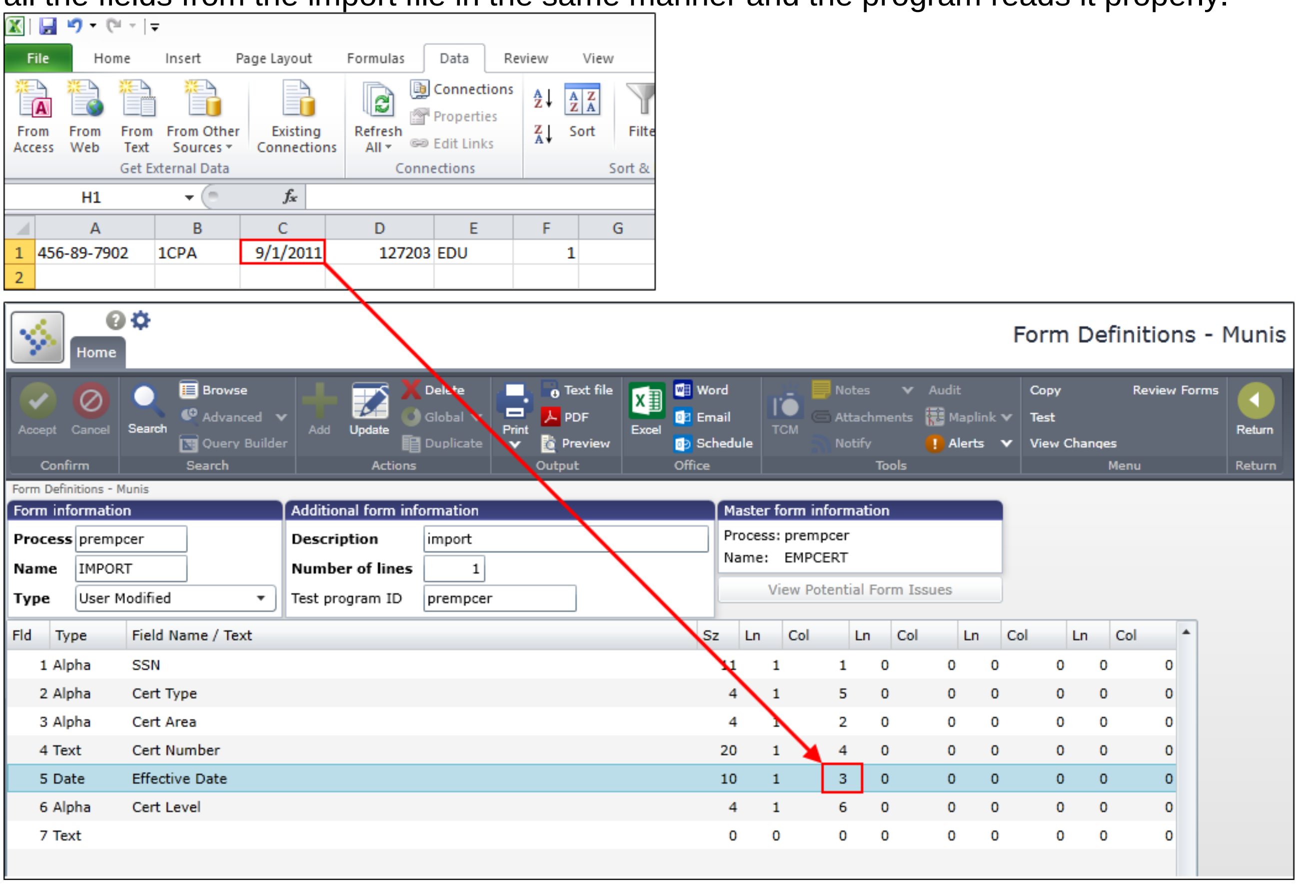
The Position Control programs have been expanded to include new employee certification fields and options.

Employee Certifications

The Use Form Column 1 check box on the Import screen in the Employee Certification program configures the import process to draw field values from the import file in an order determined by the value of the first Column field in the form definition. This option applies only to delimited files.

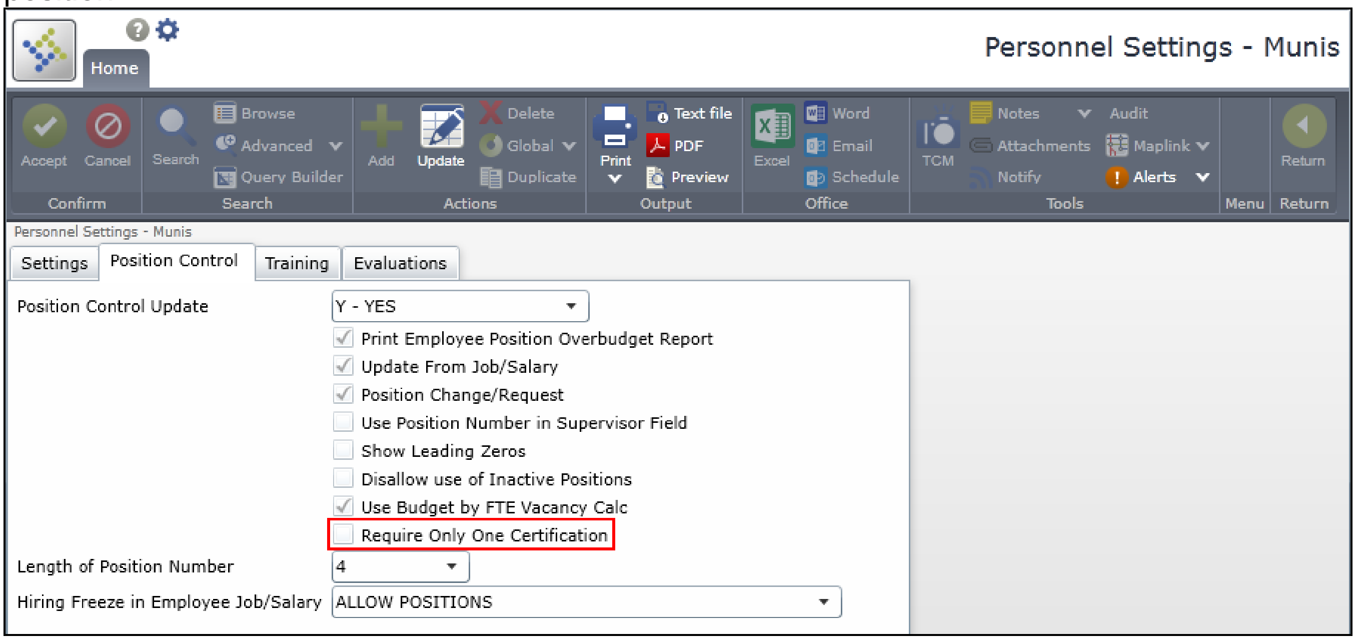


For instance, if you enable this option and the Effective Date values are in the third column of your csv import file, enter a value of 3 in the first Column field in the Effective Date row. Define all the fields from the import file in the same manner and the program reads it properly.



Personnel Settings

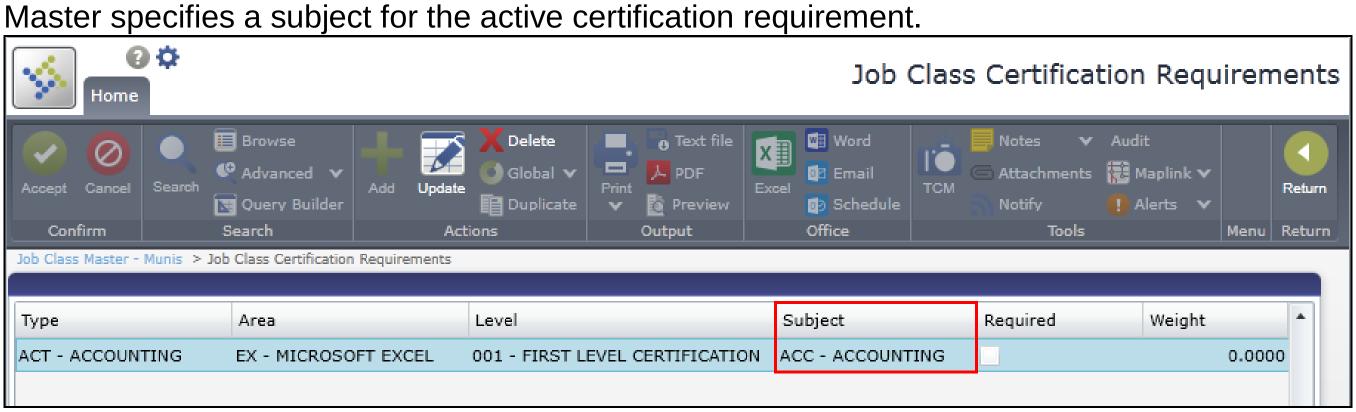
The Require Only One Certification check box on the Position Control tab in the Personnel Settings program configures the Position Control programs to require that employees meet only one or more of the specified certification requirements for any position to qualify for that position.



If you do not select this box, position control requires that employees meet all of the certification requirements.

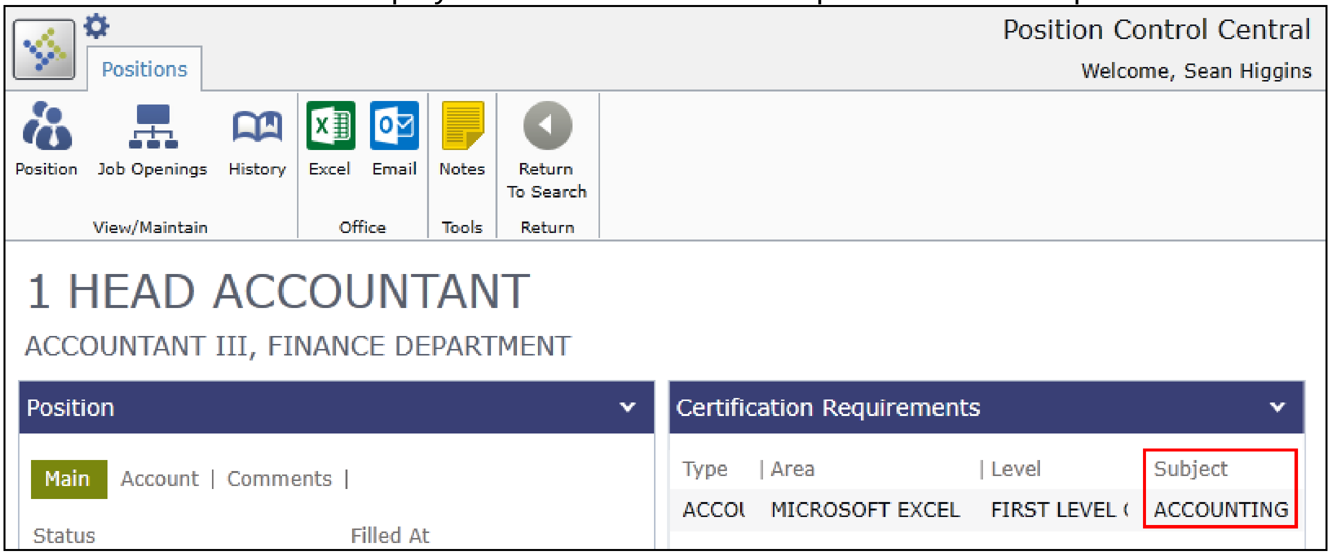
Position Control

The Subject list on the Certification Requirements screen in Position Control or Job Class Master specifies a subject for the active certification requirement.



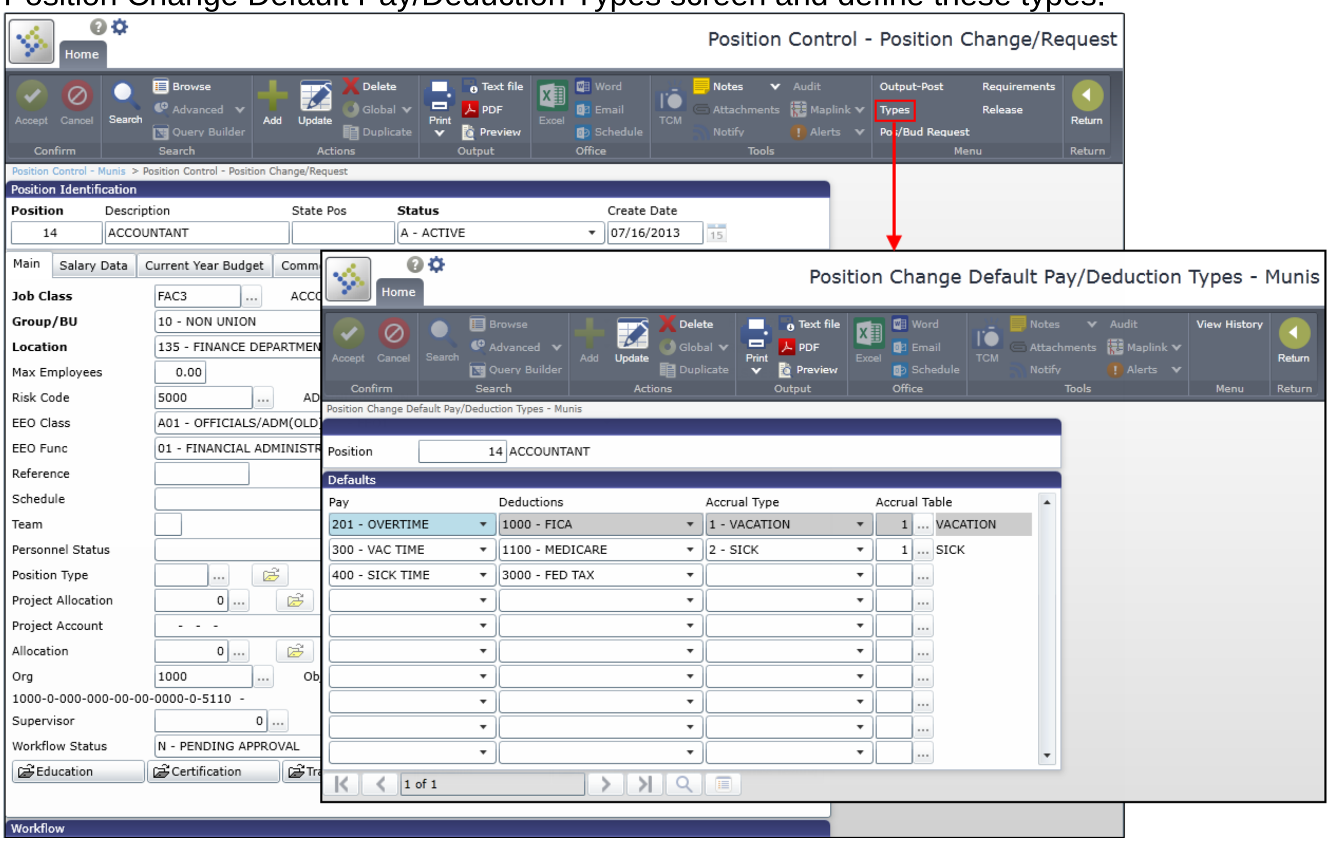
The values in this list are drawn from the subject matter codes (SUBJ) defined in the Payroll Miscellaneous Codes program. This field is not required; if you do not complete the subject field when defining position or job class requirements, position control does not use it when verifying that an employee meets those requirements.

Related central programs display the subject of a certification where appropriate. For instance, Position Control Central displays it in the Certification Requirements details pane.



All pertinent Position Control programs, reports, and processes are updated to accommodate this field.

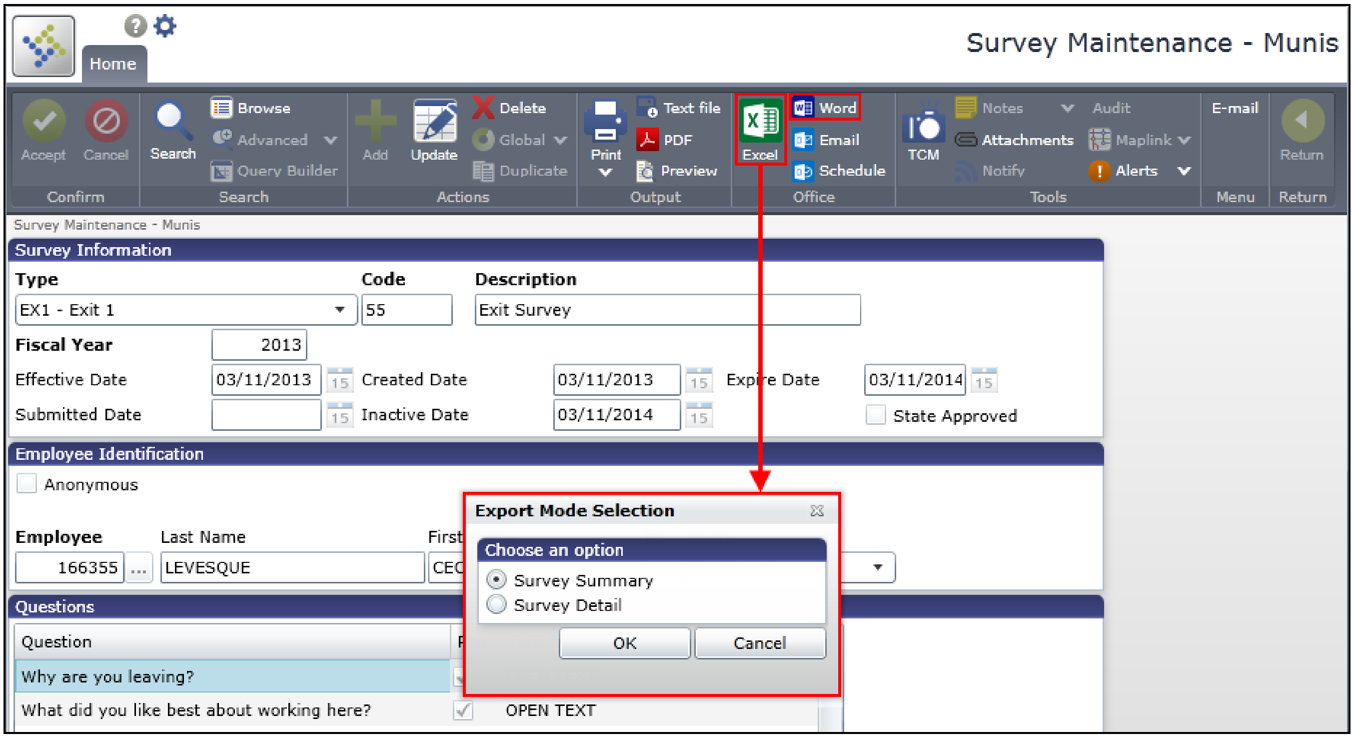
The Position Control program allows you to define default pay and deduction types for the active position. Click the Types option on the Position Change/Request screen to display the Position Change Default Pay/Deduction Types screen and define these types.



If you are updating an existing position, the values initially displayed on this screen are drawn from the live record for the position you are updating. If you modify these values and then post the position change record, the updated defaults are posted to live data along with the rest of the changes.

Surveys Maintenance

The Microsoft Word and Excel options in the Surveys Maintenance program export the records in the active set to a Word or Excel file.



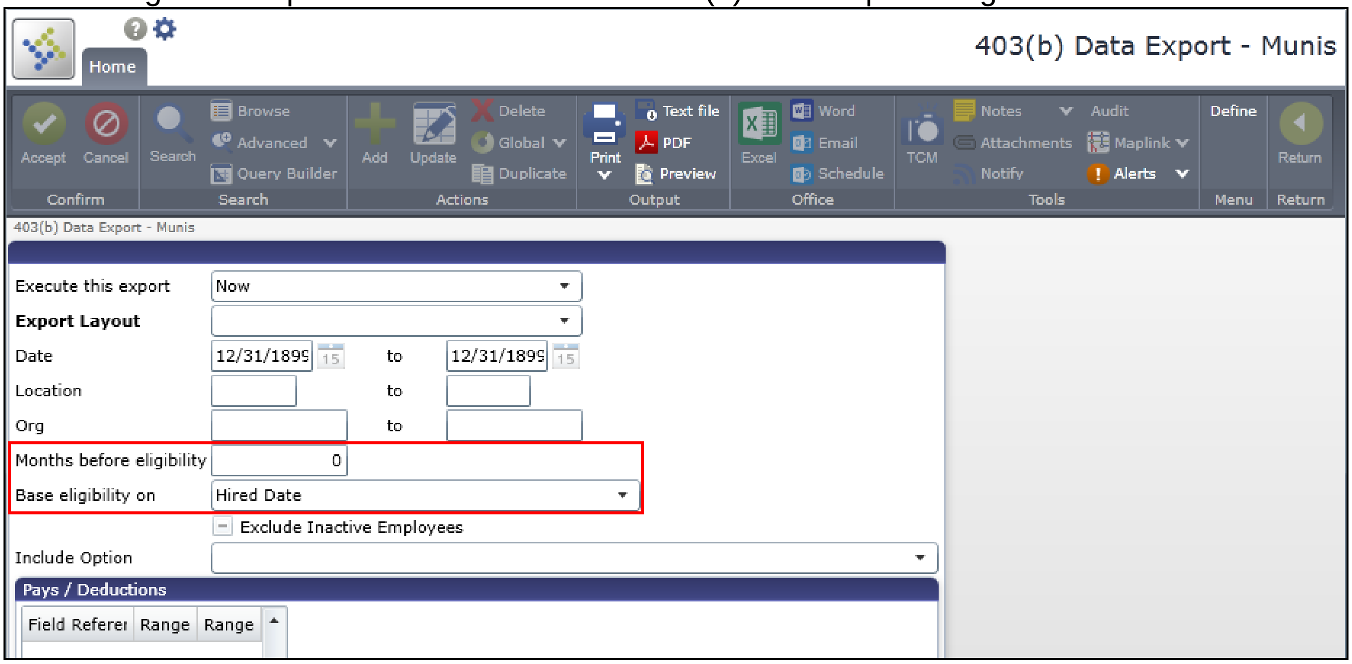
When you select one of these options, the program offers the choice of exporting a summary report or a detail report. The Survey Summary report includes the data available on the browse screen; the Survey Detail report includes survey response data as well.

Payroll for Version 10.4

The following changes apply to Munis Payroll programs.

403(b) Data Export

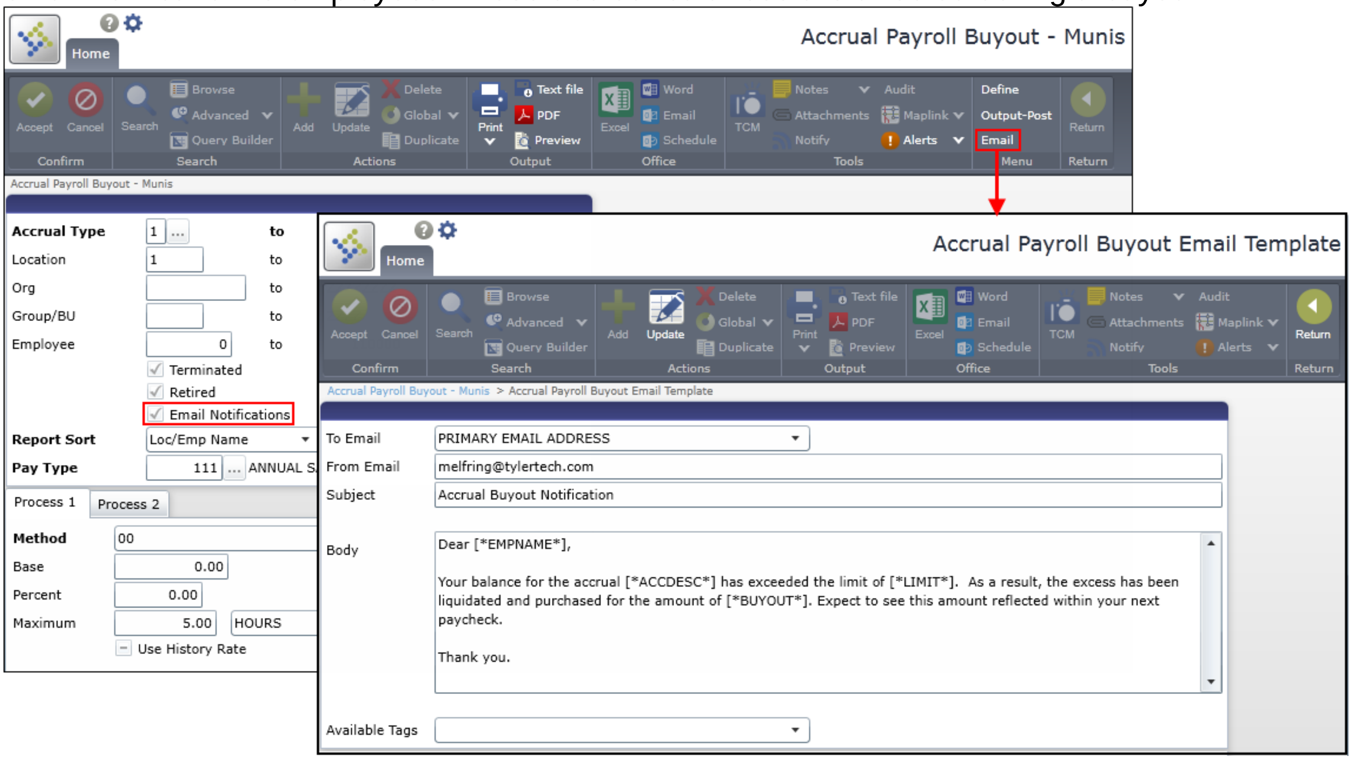
New configuration options are included in the 403(b) Data Export Program.



- The Months Before Eligibility box defines the number of months after the eligibility date that must pass before an employee becomes eligible for the export.
- The Base Eligibility On list indicates the date against which an employee's eligibility is measured, for instance the employee’s Hired Date, Service Date, or Retirement/Pension date.

Accrual Payroll Buyout

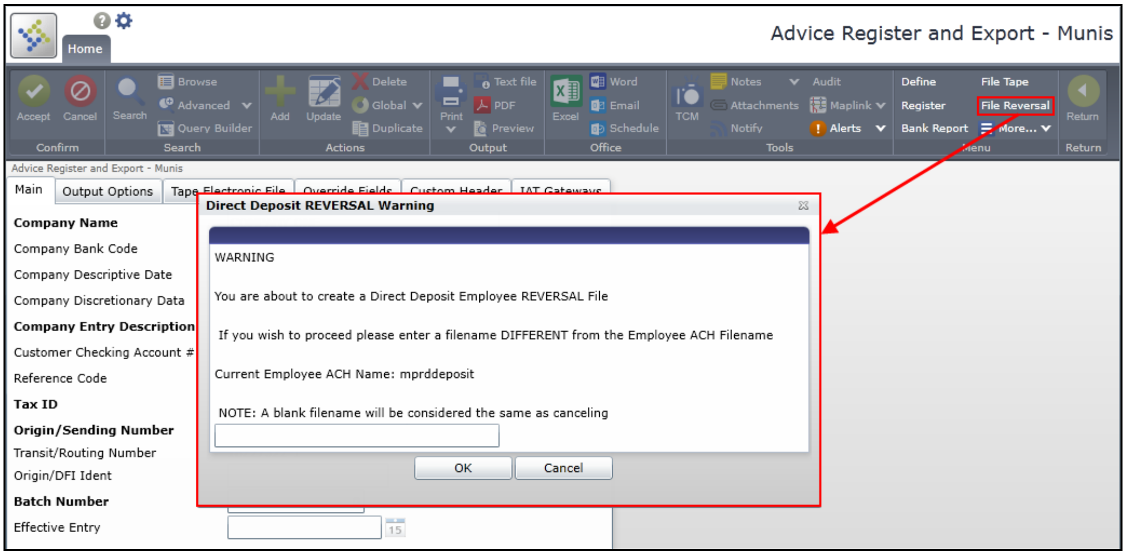
The Email Notifications option in Accrual Payroll Buyout configures the program to send an email notification to employees whose accrual balances are affected during a buyout.



Click the Email option to display the Accrual Payroll Buyout Email Template screen, where you can define the email the program sends to employees.

Advice Register and Export

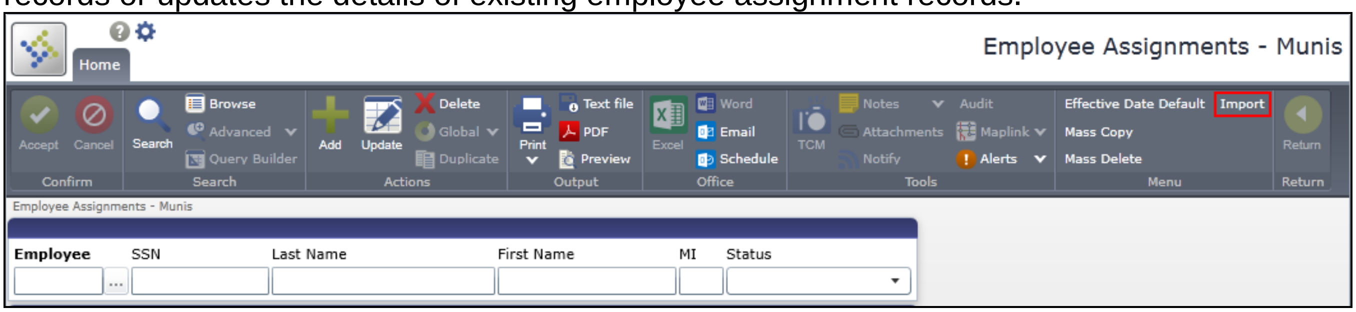
The Advice Register and Export program displays a warning when you select the File Reversal or Vendor Reversal options. This prevents you from performing an accidental reversal.



The warning dialog requires you to designate a name for the reversal document that is different from that of the direct-deposit document in order to further differentiate the two files.

Employee Assignments

The Import option in the Employee Assignments program imports new employee assignment records or updates the details of existing employee assignment records.



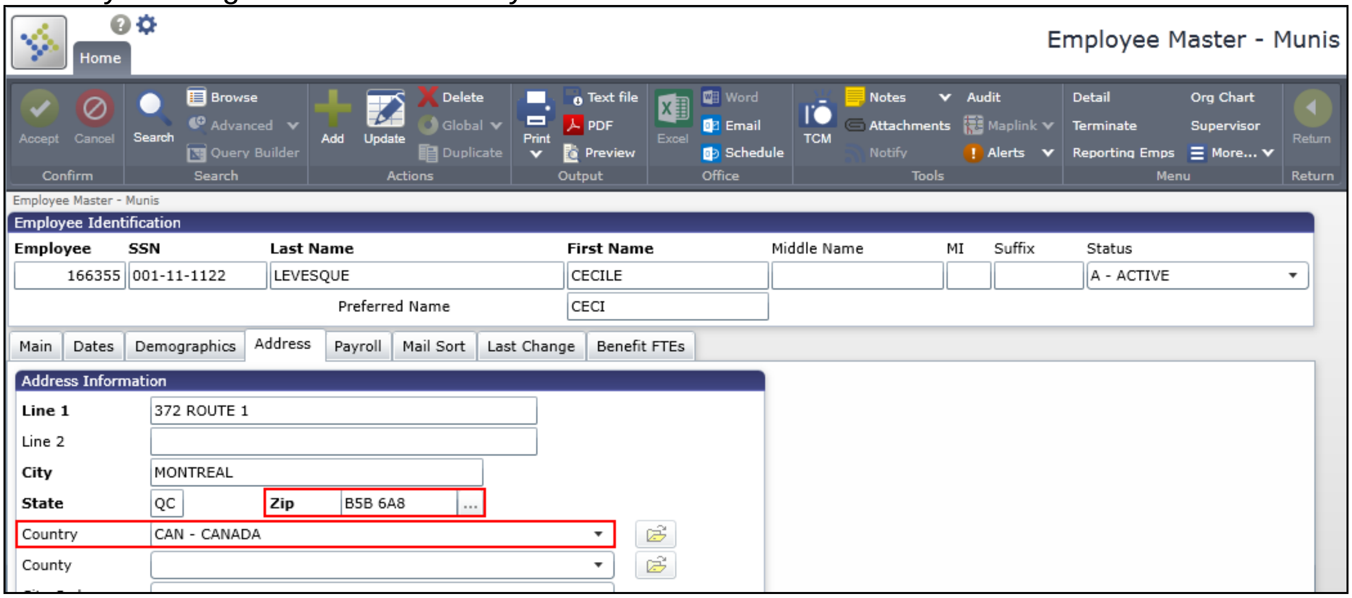
If you import an employee assignment record and a record based on the same employee, assignment, and location already exists in the program, the program updates the existing record to reflect an end date of one day prior to the effective date of the new record.

The import uses crosswalk code VAL for location crosswalking. The fields imported by this function are determined by a customizable import form definition.

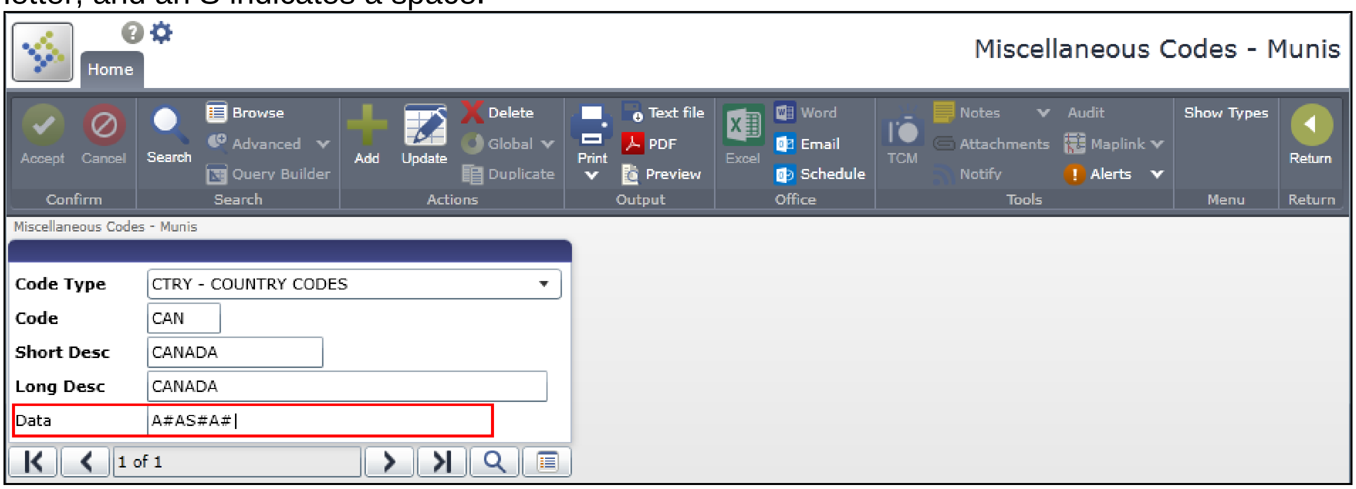
Employee Master

Employee Master functionality has been expanded to accommodate the entry of foreign postal codes when an employee's address is outside of the United States.

When you select a country code from the Country list, the Zip field accepts postal codes in the format you designate for that country.



To designate the format of a country's postal code, use the Data field for its country code in the Payroll Miscellaneous Codes program. For instance, a # indicates a number, an A indicates a letter, and an S indicates a space.

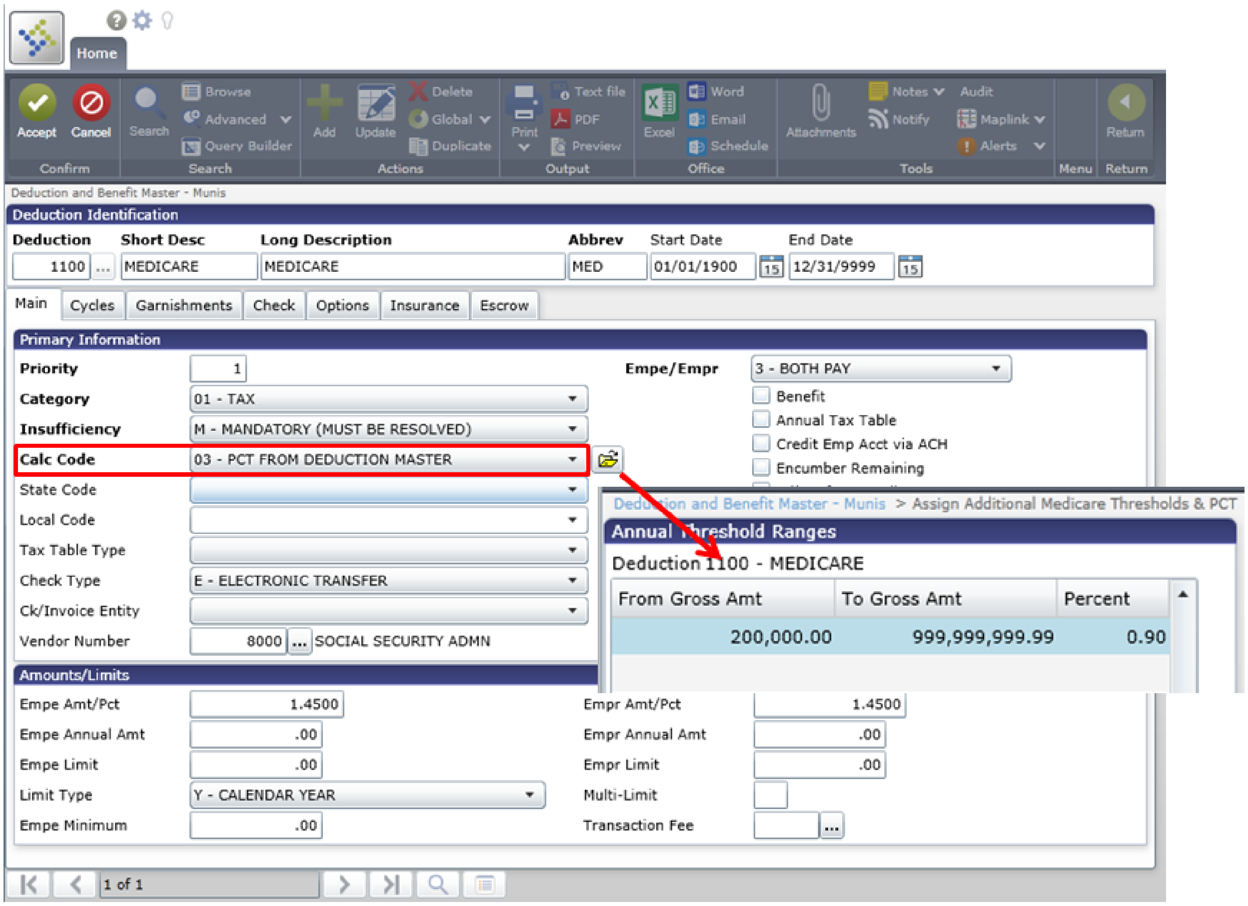


Medicare Tax for High Earners

Payroll programs have been updated to include functionality for processing additional Medicare taxes for high earners.

Deduction and Benefit Master

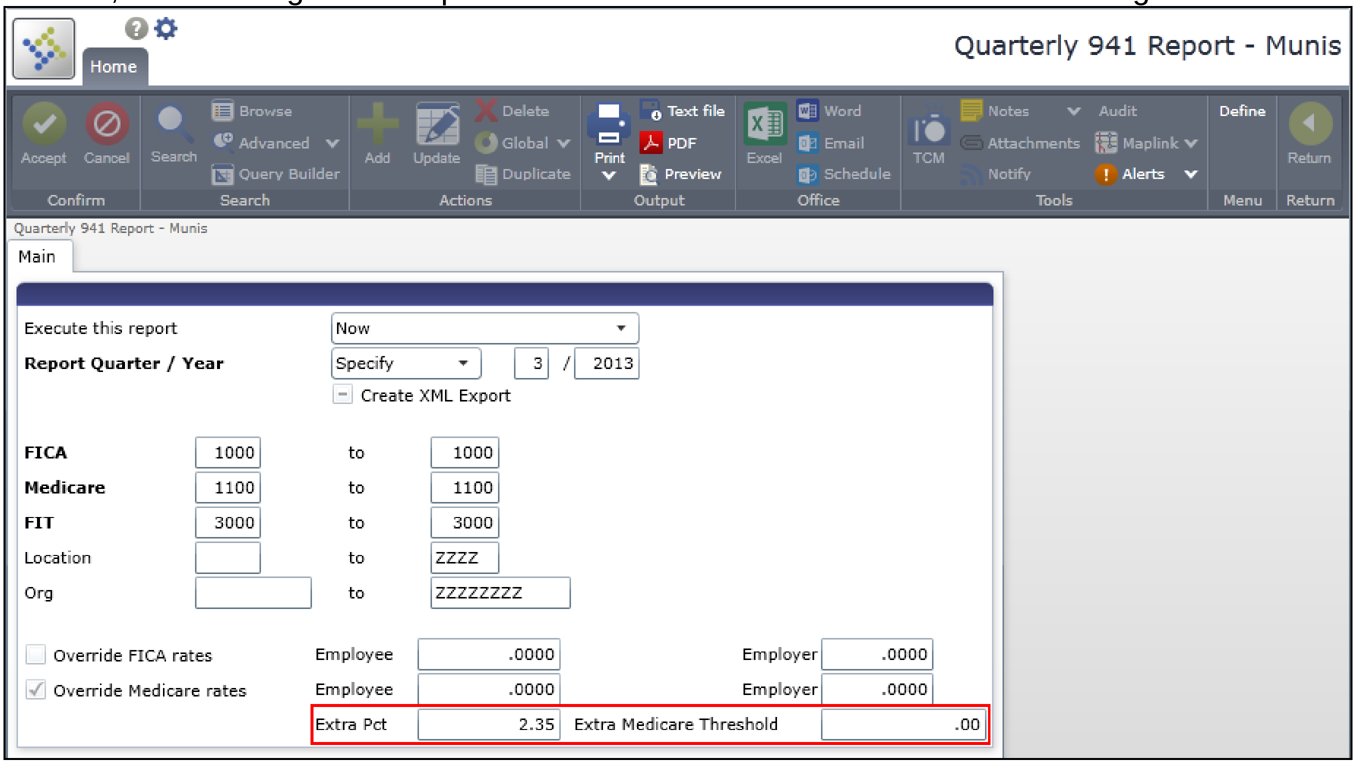
In Deduction and Benefit Master, the Assign Additional Medicare Thresholds & PCT function configures the additional Medicare tax for high earners. To access this function, click the folder button next to the Calc Code list. It is available only for Medicare deductions with a calc code of 3 - PCT From Deduction Master.



Use this function to set wage ranges within which additional Medicare tax rates applie. The rates will be applied in addition to the defined amount Empe Amt/Pct value. For example, if your site needs to apply a tax rate of 1.45% for wages earned from $0.00 to $199,999.99 and an additional 0.90% for wages over $200,000.00. The system would withhold the standard 1.45% defined in deduction master on wages under $200,000.00, and then apply the additional 0.90% once the deduction gross threshold is crossed.

Quarterly 941 Report

The Quarterly 941 Report program includes the Extra Medicare Threshold box and the Extra Pct box, which configure the report to reflect the additional Medicare taxes for high earners.

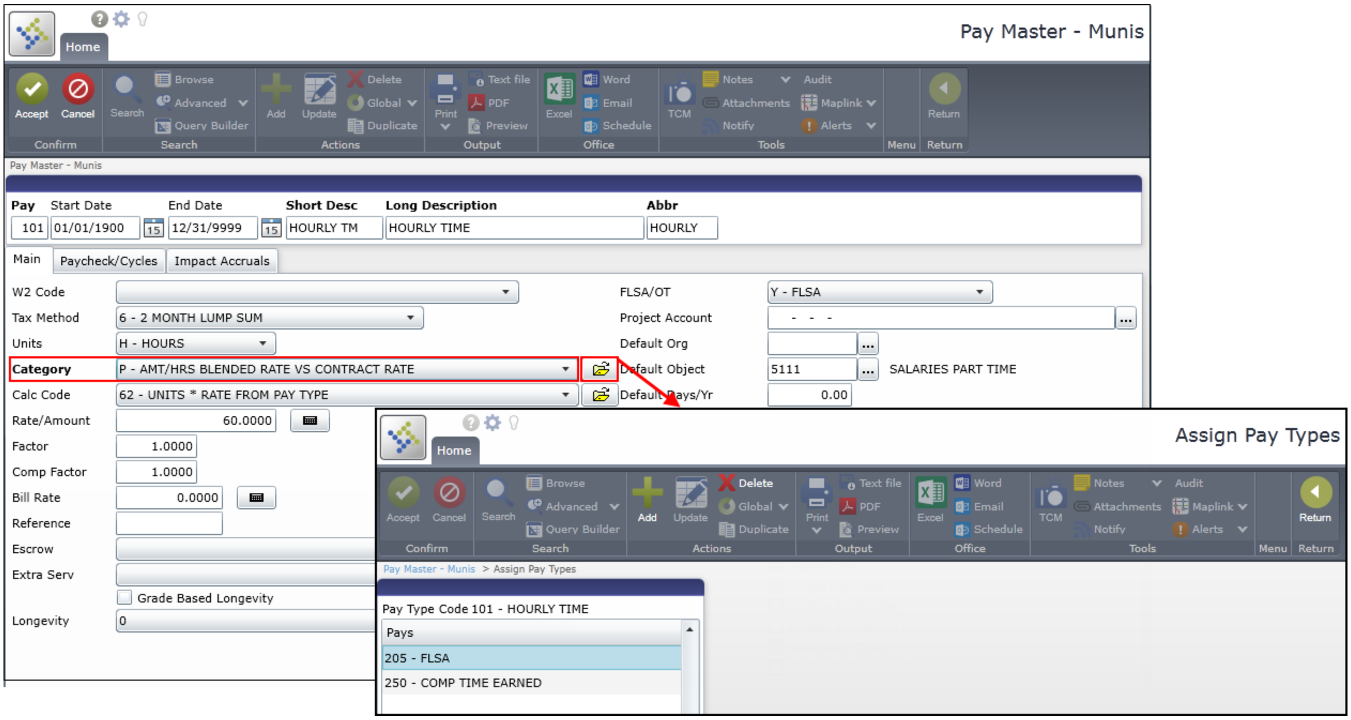


Use the Extra Medicare Threshold box to define the year-to-date wage amount over which the additional Medicare withholding is applied. Use the Extra Pct box to define the extra percentage withheld.

Pay Master

The P - AMT/HRS Blended Rate vs Contract Rate pay category in Pay Master calculates, for all included pays, the FLSA overtime amount. It then determines if the contract overtime amount is greater. If the total contract overtime amount is greater, the system subtracts the FLSA overtime amount and uses the balance as the actual amount for FLSA overtime pay. Otherwise, the FLSA overtime pay value is set to zero.

Select this category from the Category list and click the folder button to assign the pay types to include in the calculation.



Related Payroll programs have been updated to accommodate this category.

Payroll Control Settings

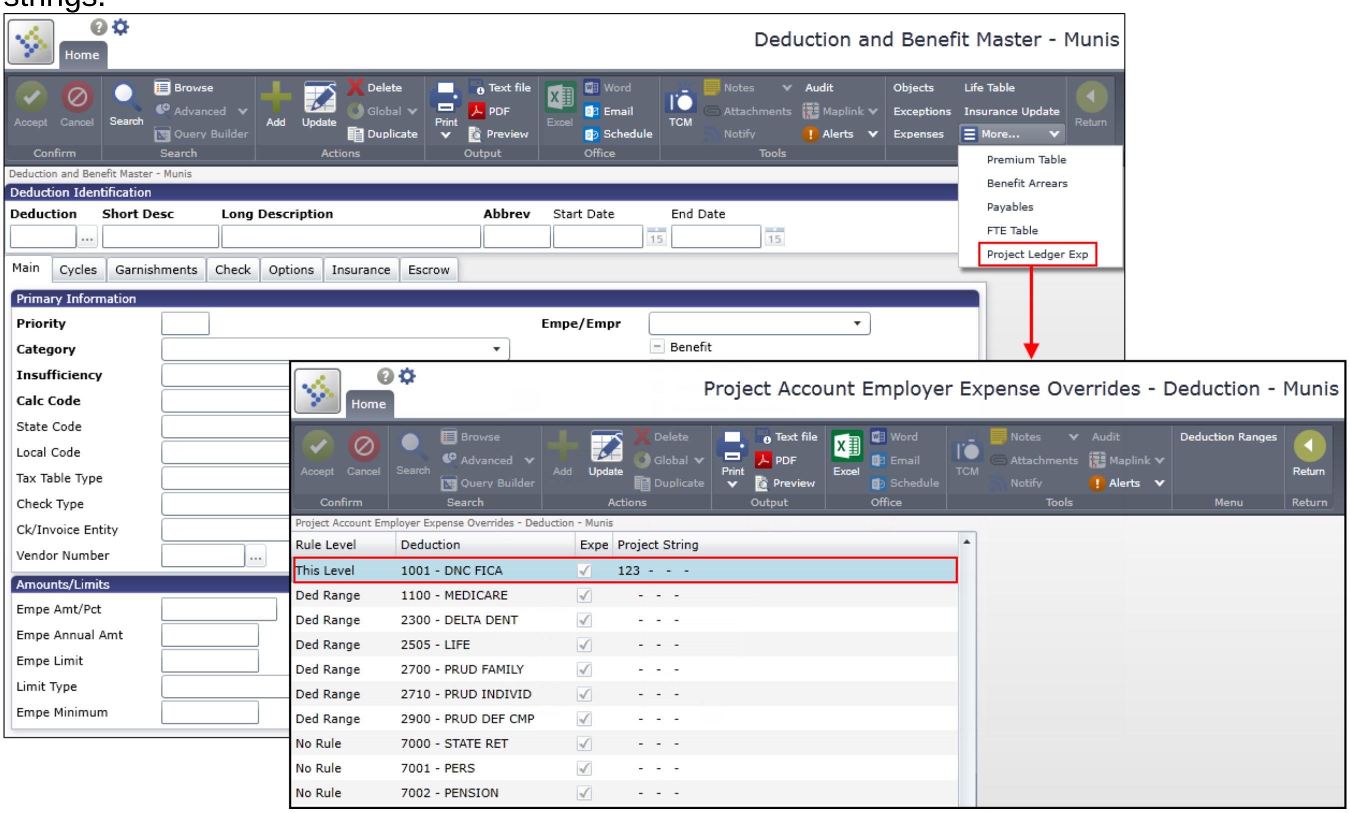
Category	Setting	Description
Check	Paycodes for Nonzero Fiscal YTD	This option, when enabled, sets the system to print all pay codes with a non-zero fiscal year-to-date total rather than a non-zero calendar year-to-date total.
Default Numbers	Next Pending Actions Number	This option defines the default number assigned to any pending actions. To configure the system to automatically assign the next available pending actions number, set this option to a value of zero (0).
ESS Time Entry	Prevent Editing of Time Entry Records	This option, when enabled, prevents employees from using ESS to edit time entry records that have already been drawn into a time entry batch.
Time Entry	Use FLSA Period	This option, if enabled, sets the Time Entry Detail screen to include the Period field, which allows you to

Category	Setting	Description
		specify whether the current record applies to the current week or next week for 9/80 FLSA overtime calculations.

Project String Overrides

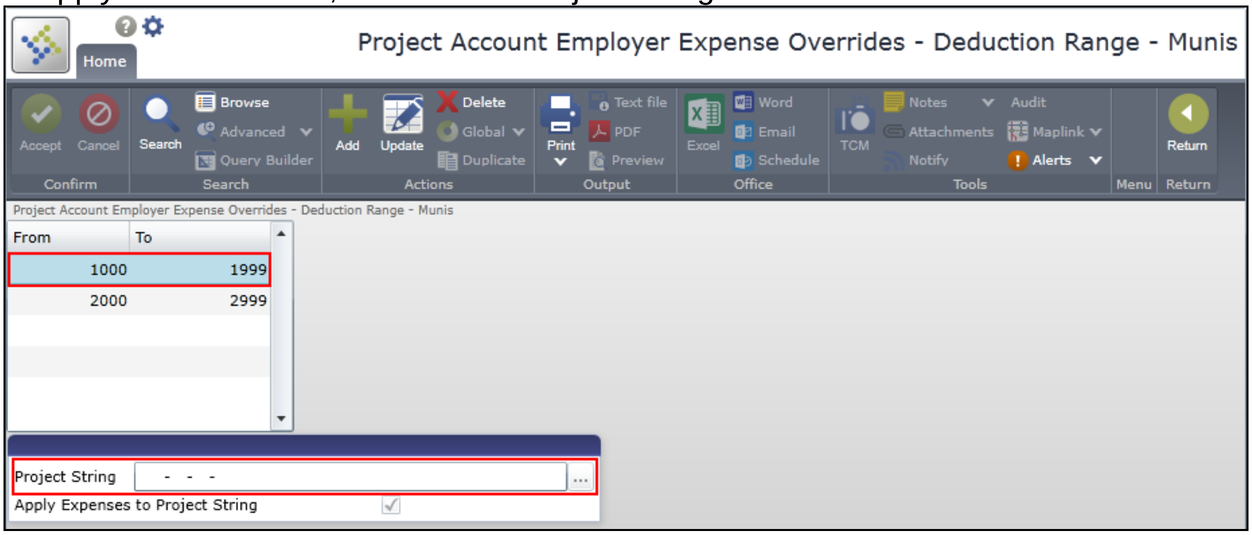
The Project Account Employer Expense Overrides program defines project string overrides, which adjust how the project ledger expenses the employer share of deductions for employee benefits.

In Deduction and Benefit Master, click Project Ledger Exp to open the Project Account Employer Expense Overrides program in the deduction mode. This mode defines project string overrides to apply to individual deductions. Use the Project String field for any deduction to specify the value of the override for that deduction. Overrides can be full or partial project strings.

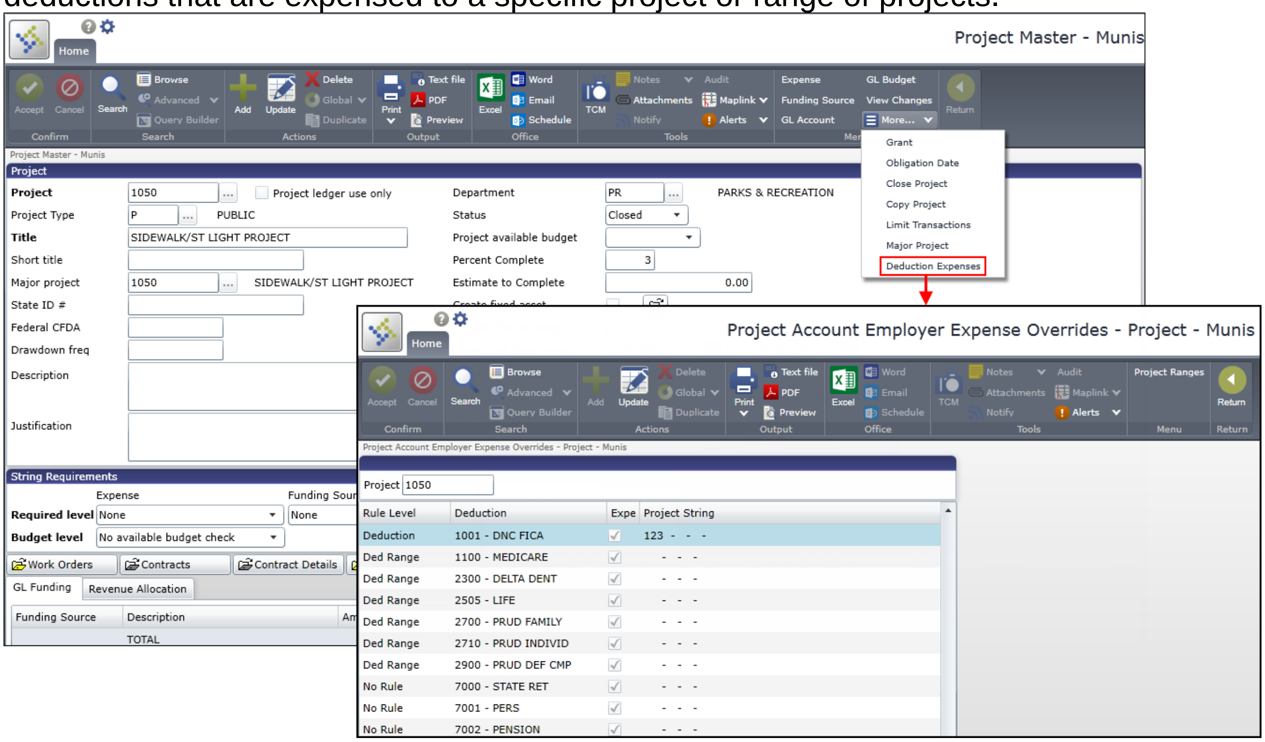


For example, if you select the Project String field for a deduction and define an override with a value of 123- - - , the program overrides the first segment of that deduction's project string with a value of 123.

Click Deduction Ranges to open the Deduction Range screen, which defines project string overrides for ranges of deductions. Use the From and To boxes to define ranges of deductions to apply the override to, and use the Project String box to define the value of the override.



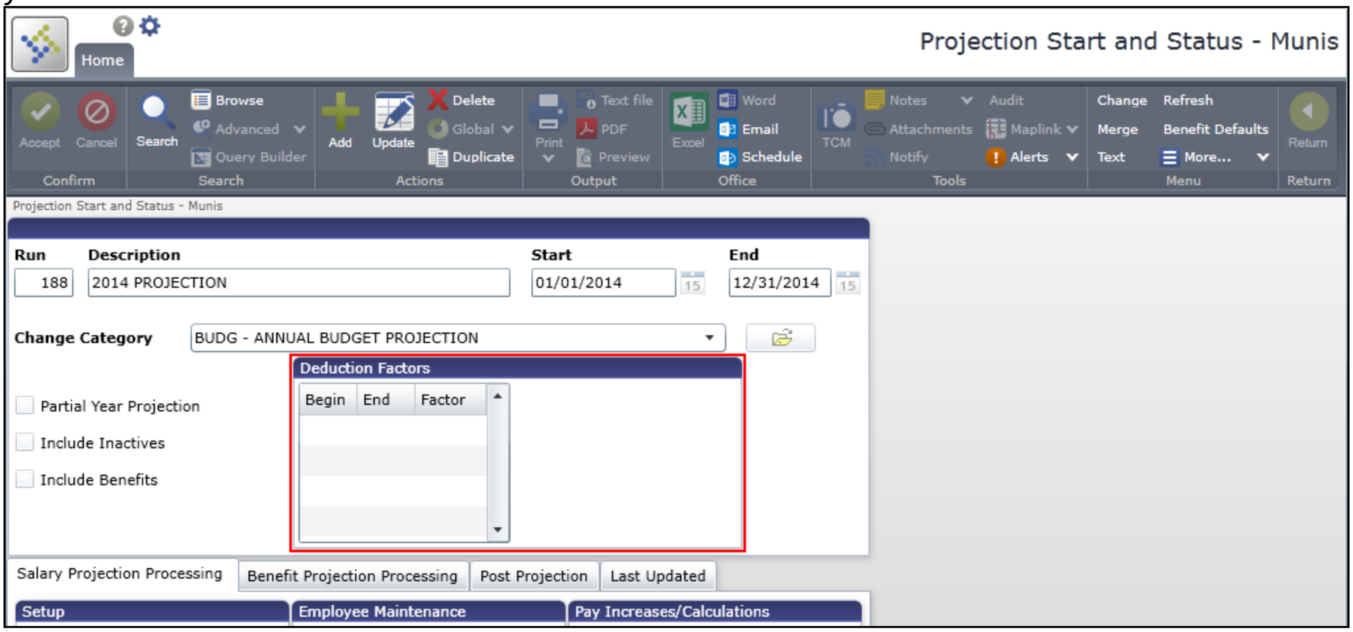
In Project Master, click Deduction Expenses to open the Project Account Employer Expense Overrides program in the project mode. This mode specifies project string overrides for deductions that are expensed to a specific project or range of projects.



The overrides are applied during the employee update portion of the payroll process.

Projection Start and Status

The Deduction Factors group in the Projection Start and Status program designates, for inclusion in the active projection, deductions that are not taken every applicable period of the year.

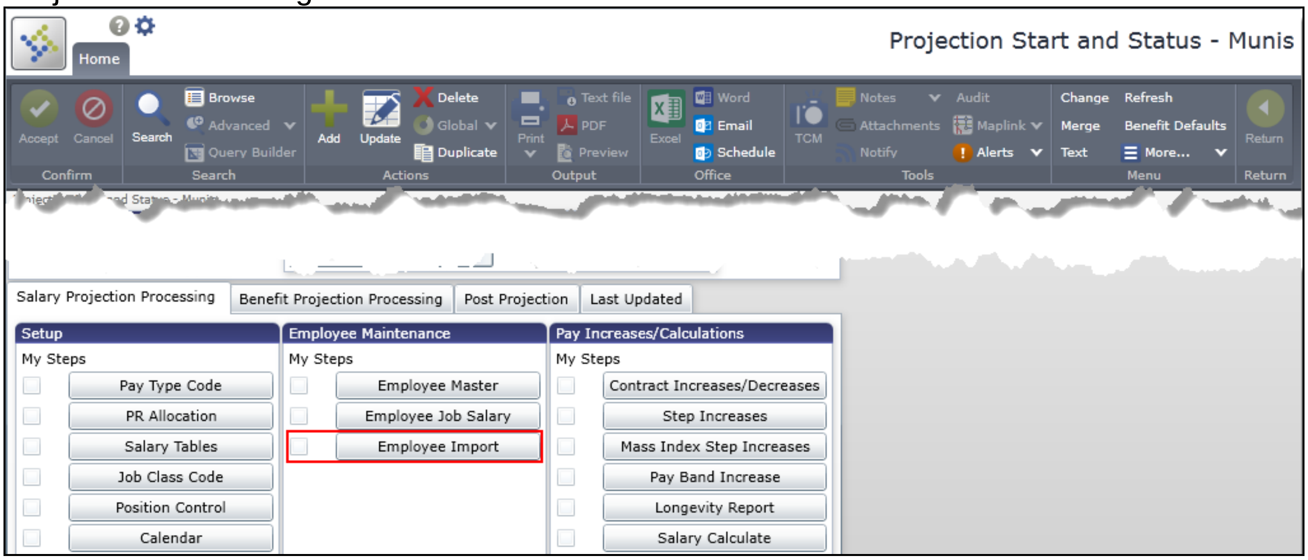


Use the Begin and End boxes to define the range within which the deductions fall. Use the Factor box to indicate the number of periods per year the deduction is taken. For instance, if health insurance deductions with calc code 22 (monthly premium) are taken 10 months out of the year rather than all 12, enter the range that includes those deductions in the Begin and End fields and then enter 10 in the Factor field.

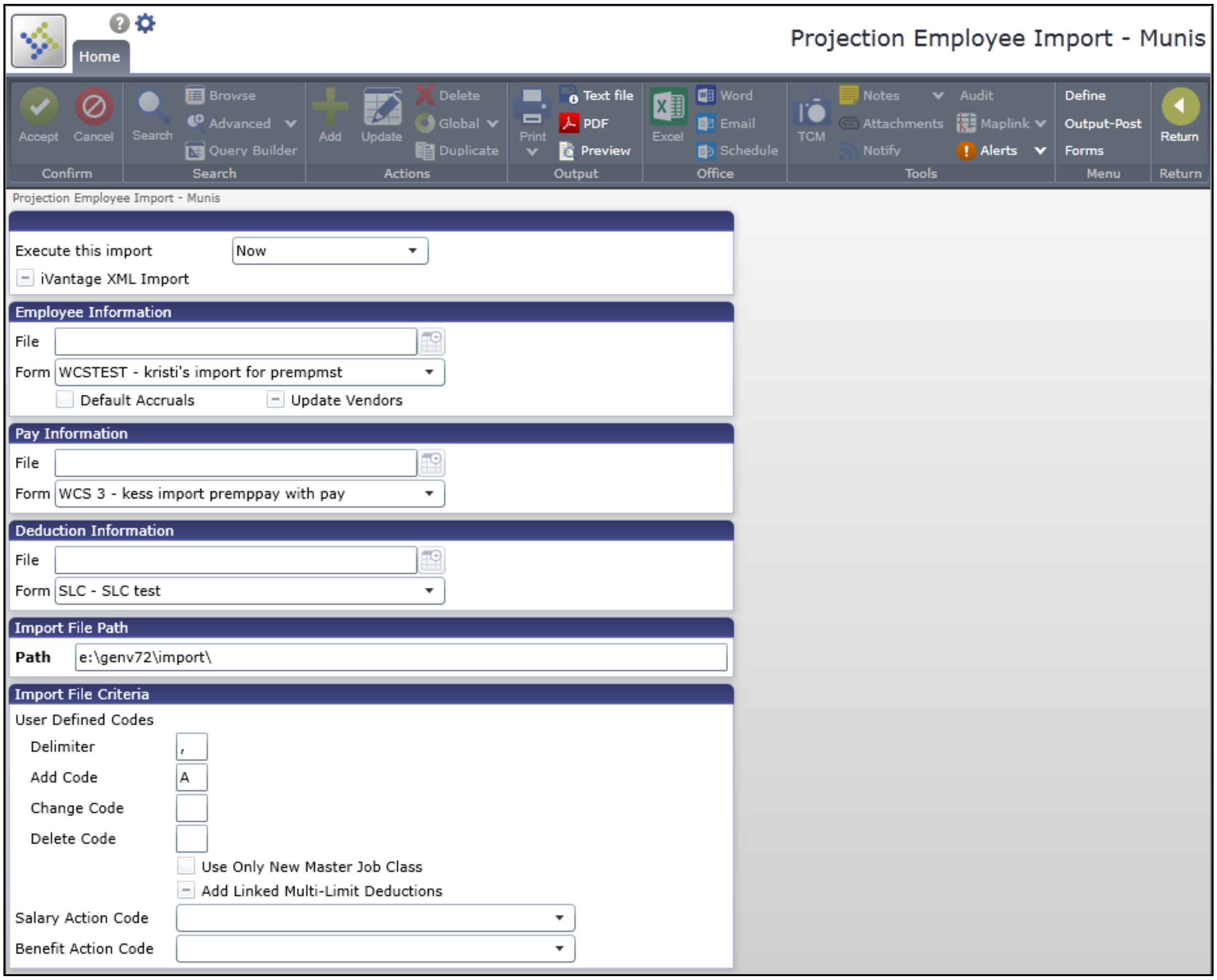
These fields are available for use only with deductions that have one of the following calc codes:

- 01-AMT From Deduction Master
- 02-AMT From Employee Deduction
- 22-Health INS (Monthly Premium)
- 23-Health INS (Premium Table)
- 25-Health INS -Premium Tbl w/ Adjustm

The Employee Import button is included in the Employee Maintenance group on the Salary Projection Processing tab.



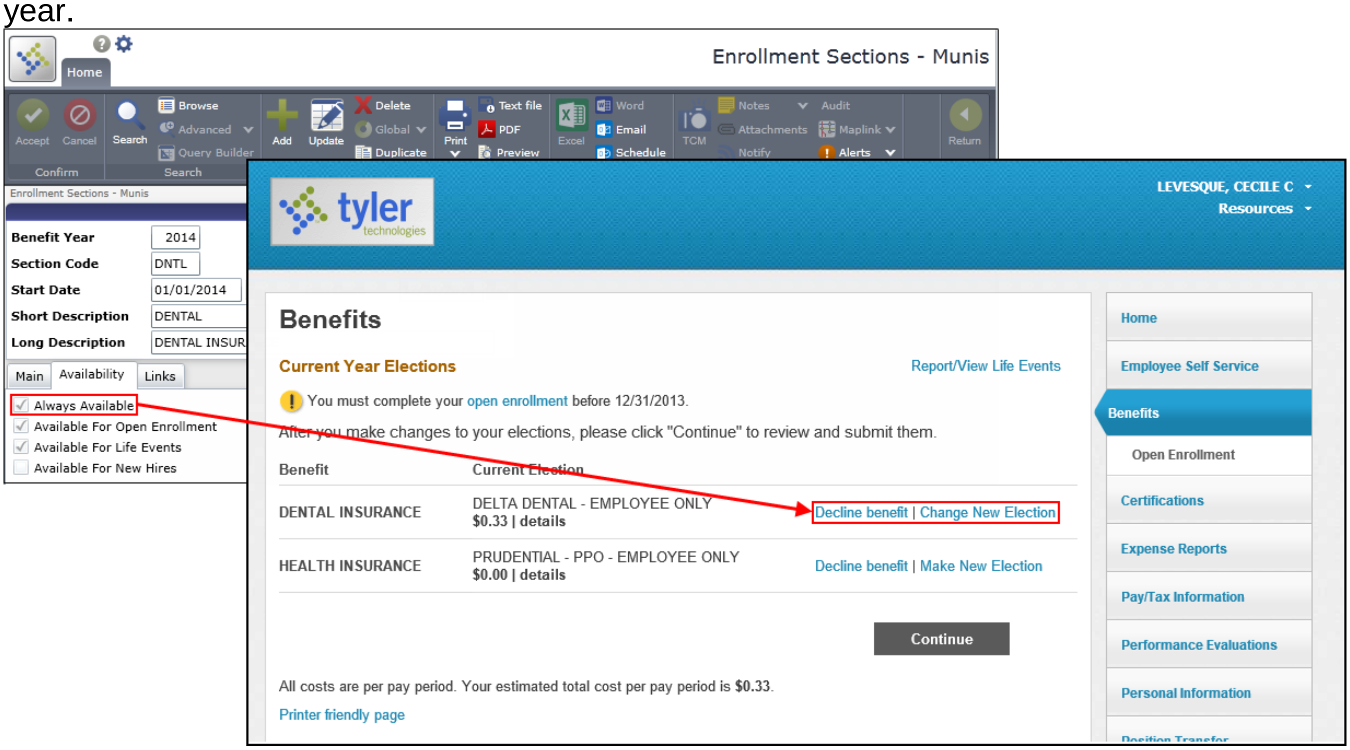
This button opens the Projection Employee Import program, which imports employee data into your projection from an external source.


Projection Employee Import - Munis
Home
Accept
Cancel
Confirm
Search
Browse
Advanced
Query Builder
Add
Update
Delete
Global
Duplicate
Actions
Print
Text file
PDF
Preview
Output
Excel
Word
Email
Schedule
Office
TCM
Notes
Attachments
Notify
Audit
Maplink
Alerts
Tools
Define
Output-Post
Forms
Menu
Return
Projection Employee Import - Munis
Execute this import
Now
iVantage XML Import
Employee Information
File
Form
WCSTEST - kristi's import for prempmst
Default Accruals
Update Vendors
Pay Information
File
Form
WCS 3 - kess import premppay with pay
Deduction Information
File
Form
SLC - SLC test
Import File Path
Path
e:\genv72\import\
Import File Criteria
User Defined Codes
Delimiter
,
Add Code
A
Change Code
Delete Code
Use Only New Master Job Class
Add Linked Multi-Limit Deductions
Salary Action Code
Benefit Action Code

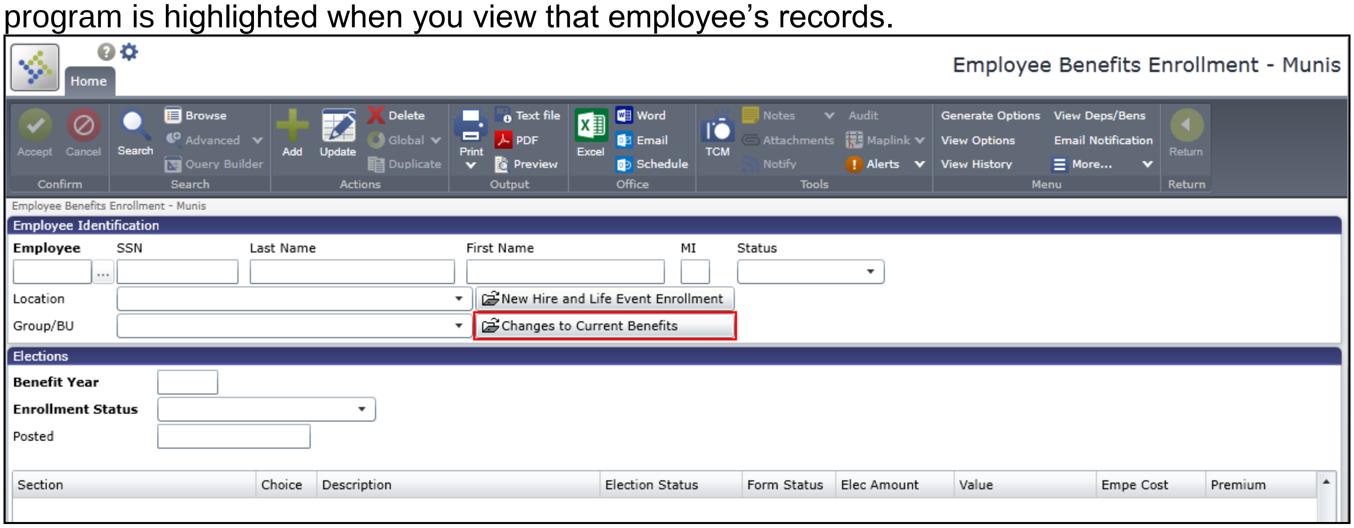
Employee Self Service

Benefits

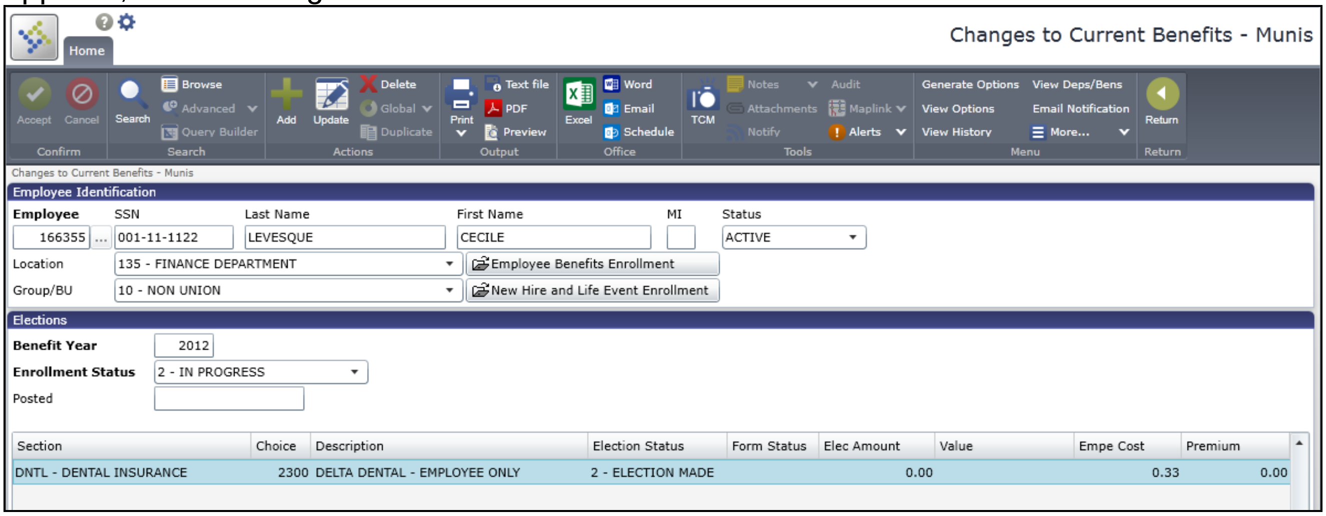
The Employee Self Service (ESS) Benefits Page displays the Make New Election and Decline Benefit options for benefit sections that are designated as always available in the Enrollment Sections program. As a result, employees can change elections for these sections at any time of the
year.



When an employee makes a change to a current election in a section designated as always available, the Changes to Current Benefits button in the Employee Benefits Enrollment program is highlighted when you view that employee's records.



Click the button to open the Changes to Current Benefits screen, which allows you to maintain, approve, or add changes to current benefits enrollment records.

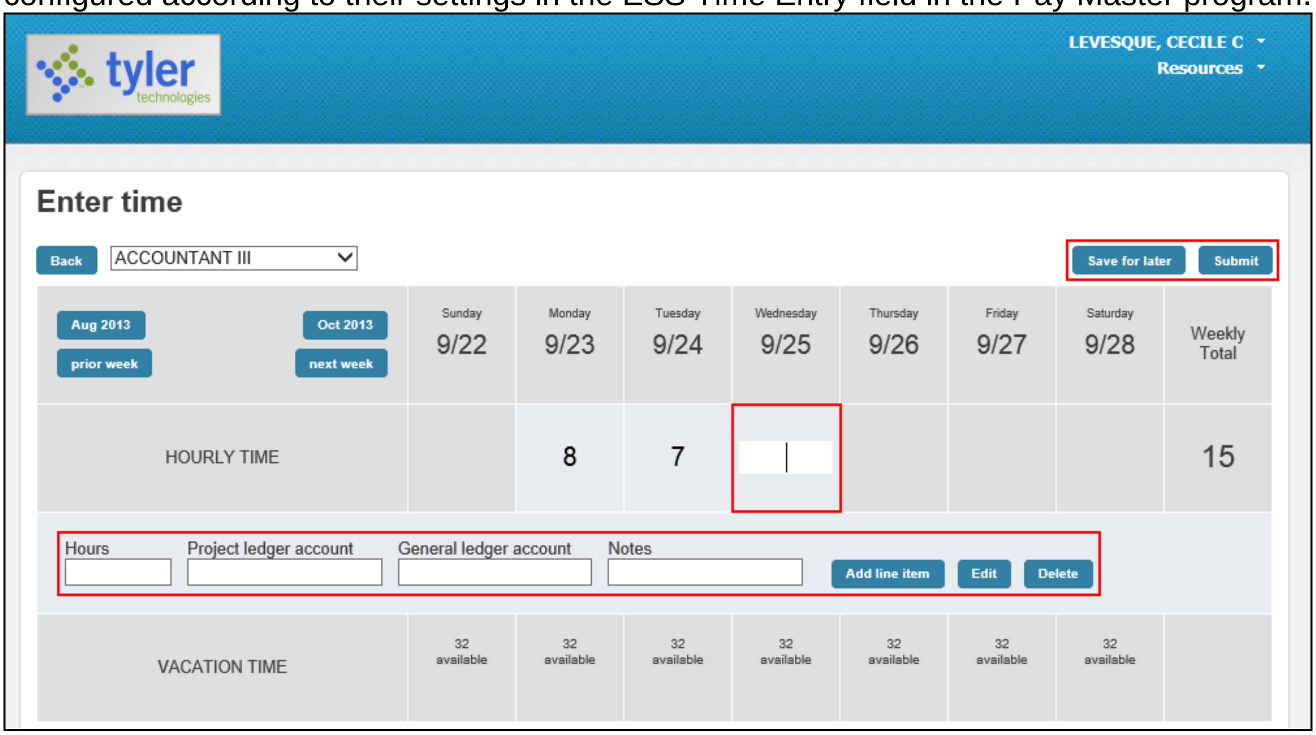


These enrollment records are processed in the same manner as Open Enrollment or Life Event records.

Time Entry

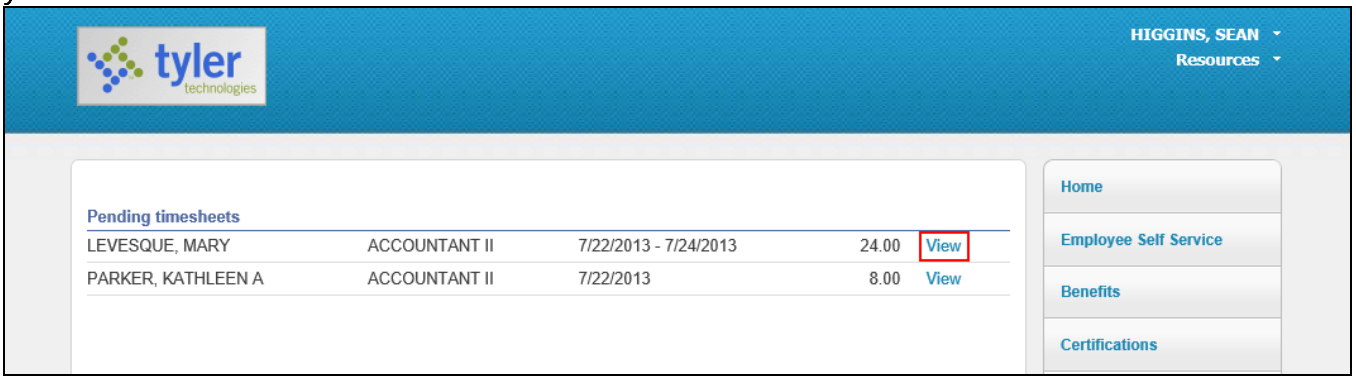
ESS Time Entry has been updated to improve usability and readability.

Click Enter Time on the ESS menu to display the Enter Time page. Fill out your time sheet by entering hours you have worked in the grid. To enter hours and additional details, select a box in the grid and use the fields provided. Pay types and accrual types are available and configured according to their settings in the ESS Time Entry field in the Pay Master program.

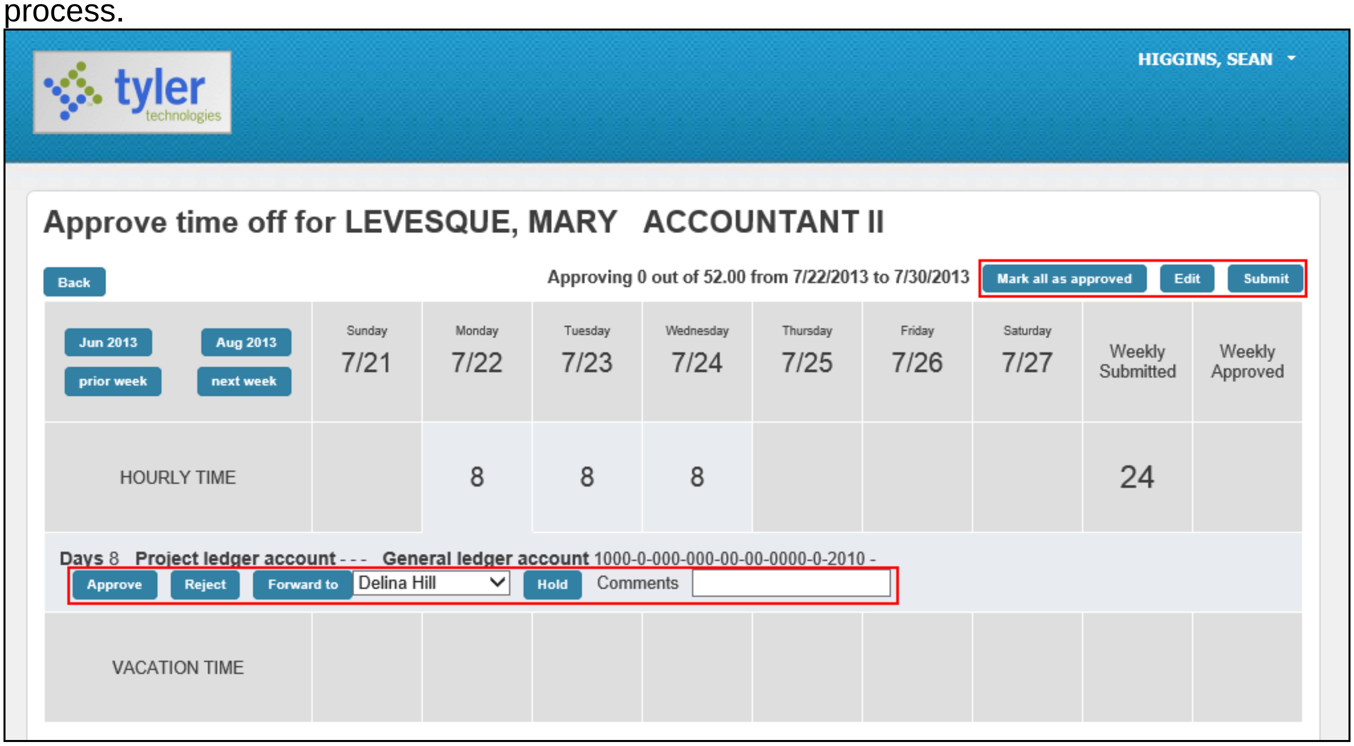


Click Submit to submit a completed time sheet, or click Save for Later to save the time sheet and return to complete it at a later time.

If your organization has not configured workflow, time sheet entries are automatically marked as approved. Otherwise, the entries require the approval of a supervisor. If you are a supervisor, click Time Entry on the ESS menu to display all pending time sheets submitted by your subordinates.



Click View to display the Approve Time Off screen, where you can complete the workflow process.

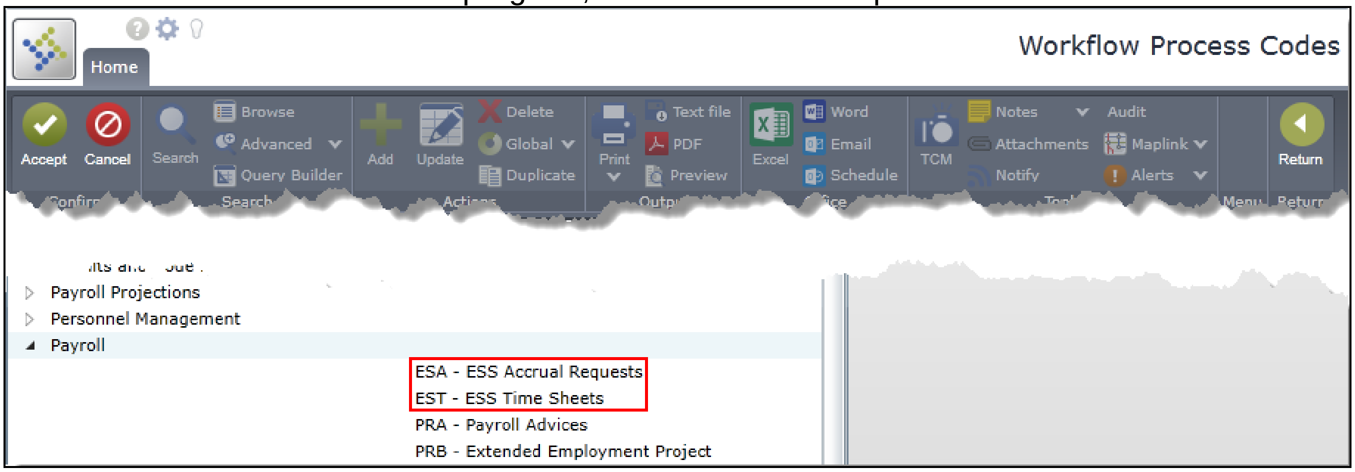


Use the Mark All as Approved button to approve all individual entries displayed; respond to each individual entry by clicking it in the grid and selecting one of the workflow options the program displays. Use the Edit button to update the time sheet. Click Submit to submit the time sheet.

Workflow

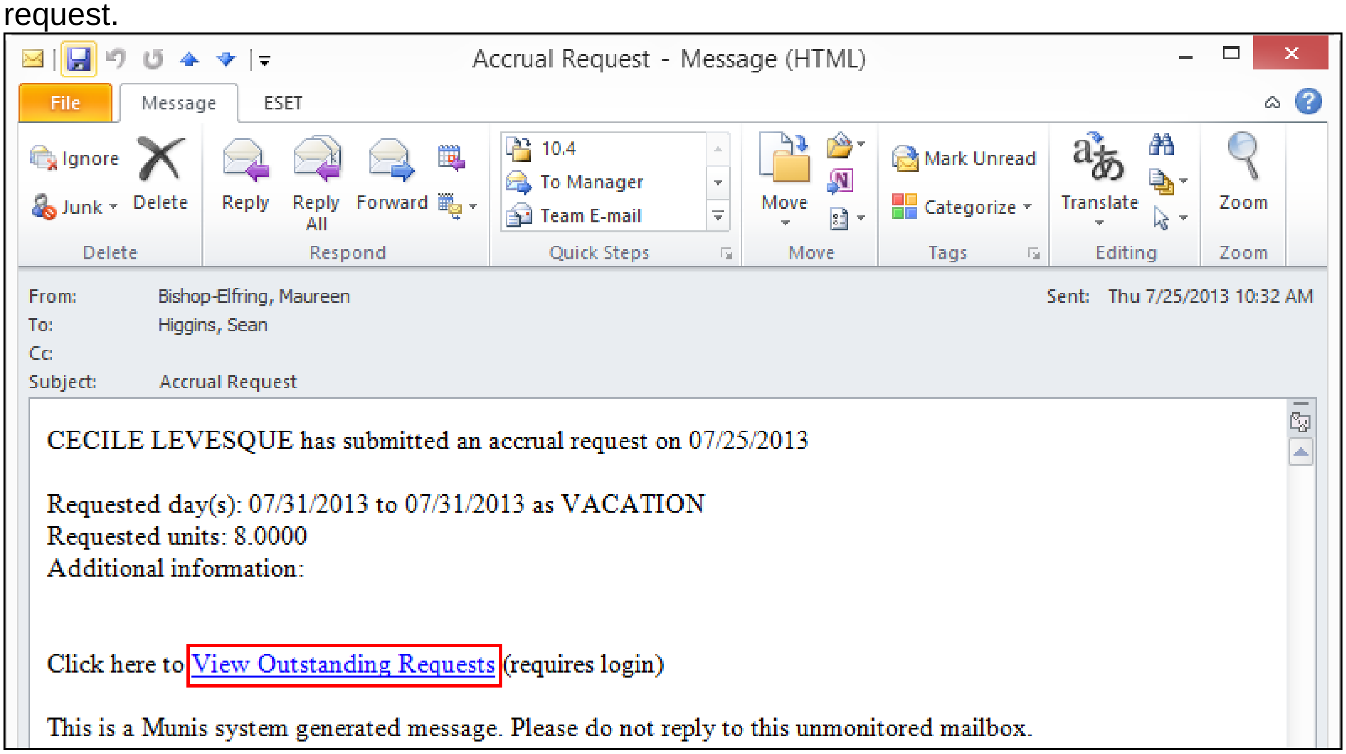
The Employee Self Service (ESS) accrual and time sheet approval processes have been updated to accommodate the Munis Workflow functionality.

In the Workflow Business Rules program, new ESS workflow process codes are available.

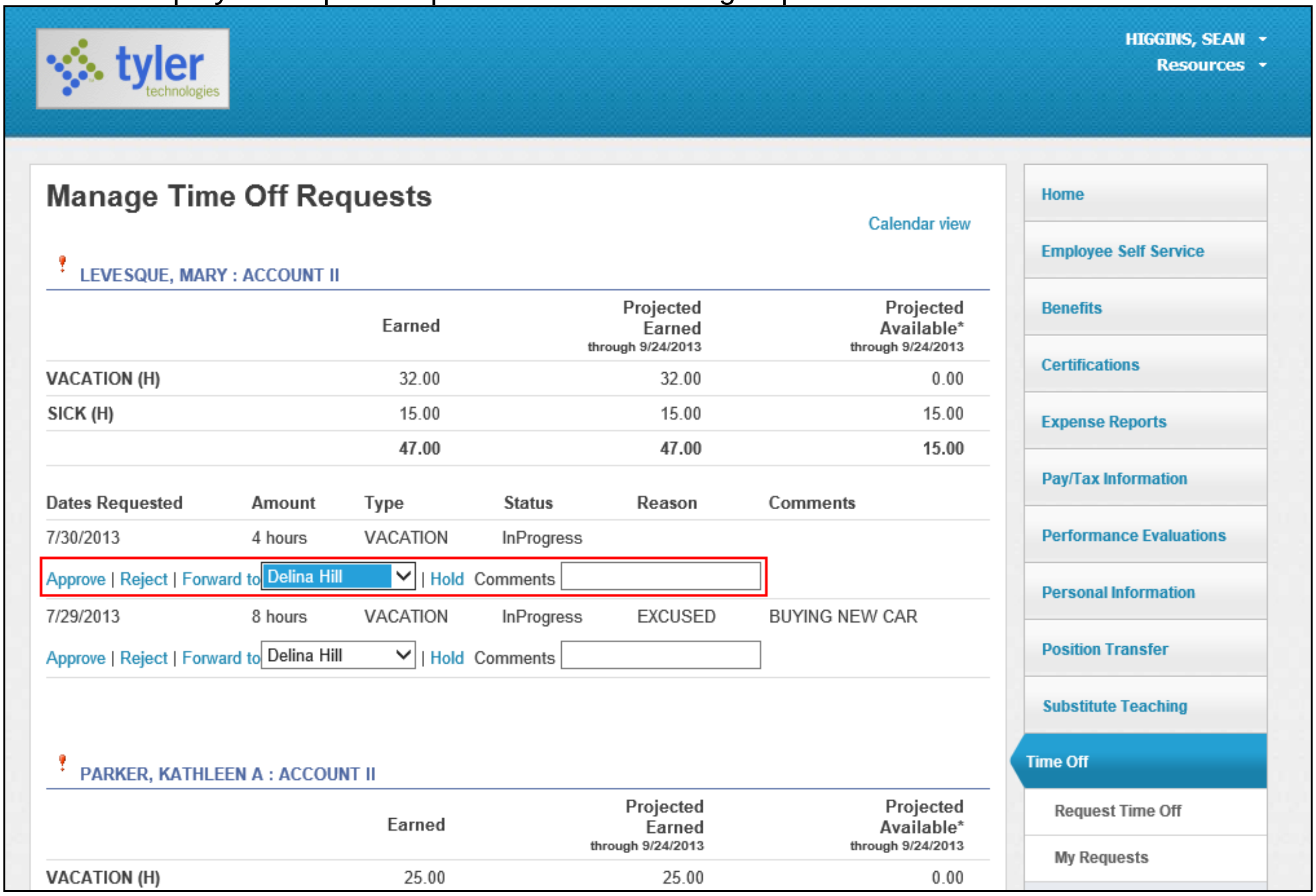


The ESA – ESS Accrual Requests process code manages the approval process for ESS accrual requests; the EST – ESS Time Sheets process code manages the approval process for ESS Time Sheet requests. Configure these processes to enable workflow functionality for ESS accrual and time entry requests.

If your organization has enabled workflow and you are a supervisor who manages employees, ESS sends you an alert email when one of your employees completes an accrual or time sheet request.

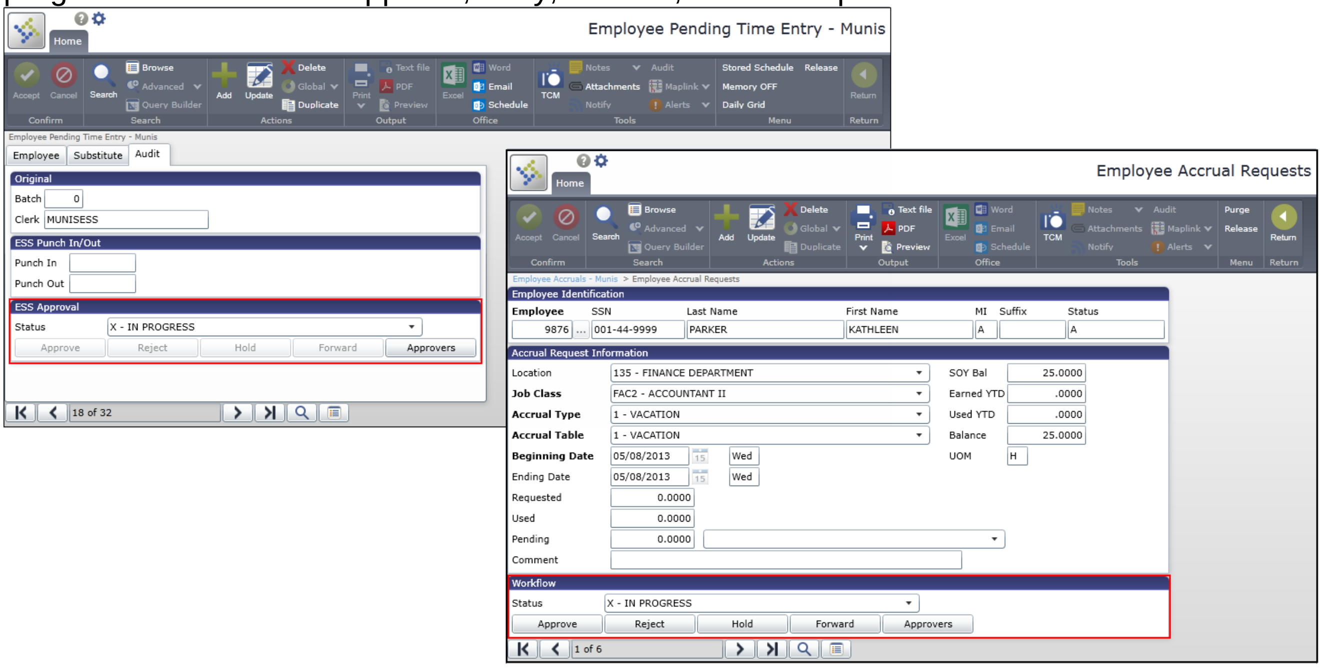


If you receive an accrual request email, click View Outstanding Requests to display the Manage Time Off Requests page. Use the Approve, Reject, Forward, and Hold options to complete the workflow process for any pending accrual requests. This page is also accessible from the Employee Requests option in the Time Off group on the ESS menu.



To manage time-off requests, click the View option on the Time Entry page in ESS to display the Approve Time Off page, where the standard workflow process options are also available.

The Audit tab in the Employee Pending Time Entry program and the Employee Accrual Requests screen in the Employee Accruals program enable you to complete the workflow approval process for pending ESS requests. If you have the proper permissions, use these programs to review and approve, deny, forward, or hold requests.



If you have superuser privileges, you can also use these programs to add, update, and delete ESS accrual or time entry records.

System Administration - HR/Payroll Roles

Field Name	Description
Applicant Criminal History Applicant Interview Text	These category access options define the active role's access to an applicant criminal records or interview notes in the pertinent programs.

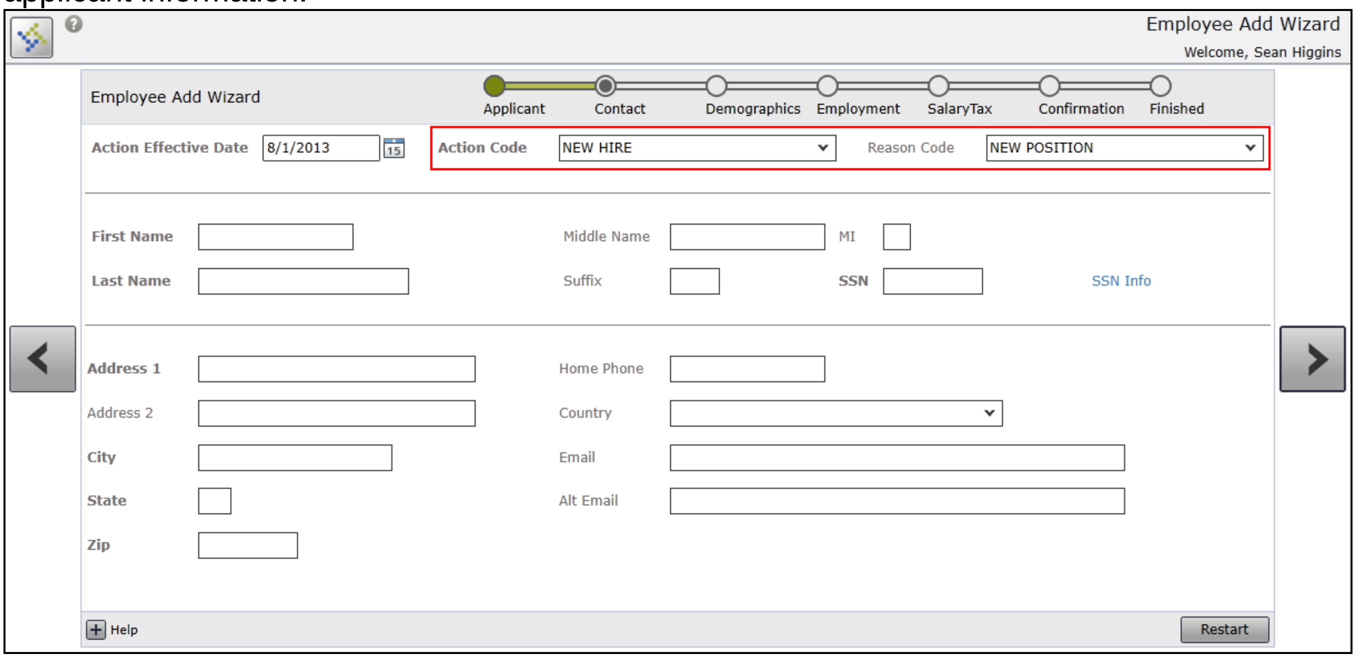
Munis Central Programs

Munis central programs are available from Other Applications menu within Munis. The Centrals menu is organized by product: Financials, HR/Payroll, Revenues, and Administration. The following are HR/Payroll central program enhancements included with Munis Version 10.4.

HR Command Center

Employee Add

If you have the permissions to access the Employee Add program through the HR Command Center but do not have the permissions required to view applicant information, the program opens to the Contact page, bypassing the Applicant page. This prevents you from accessing applicant information.

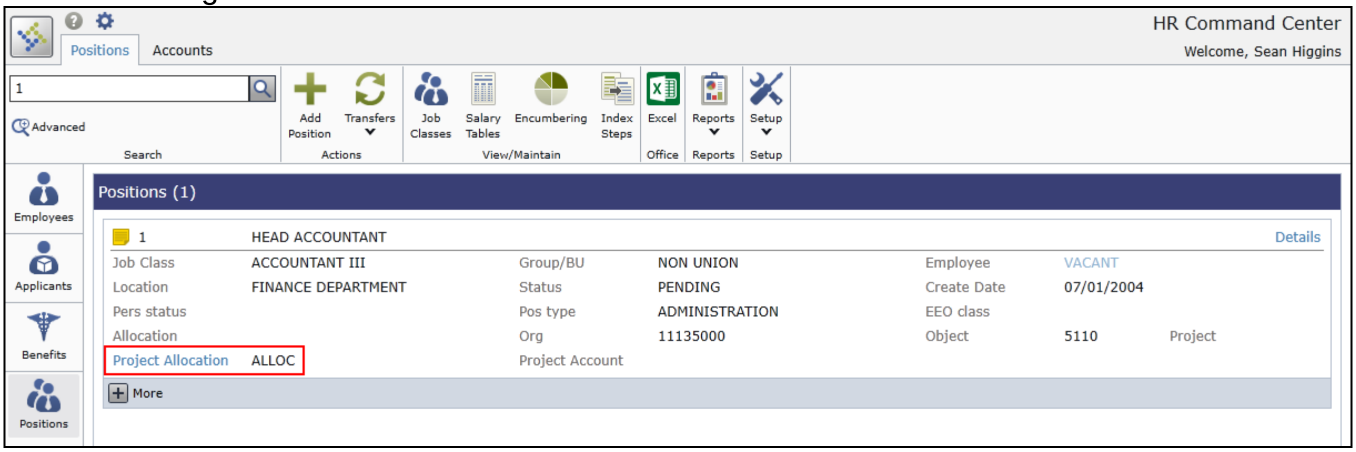


On the Contact page, the Action Code list defines an action code to be associated with the addition of the new employee. The Reason Code list indicates the reason for the action.

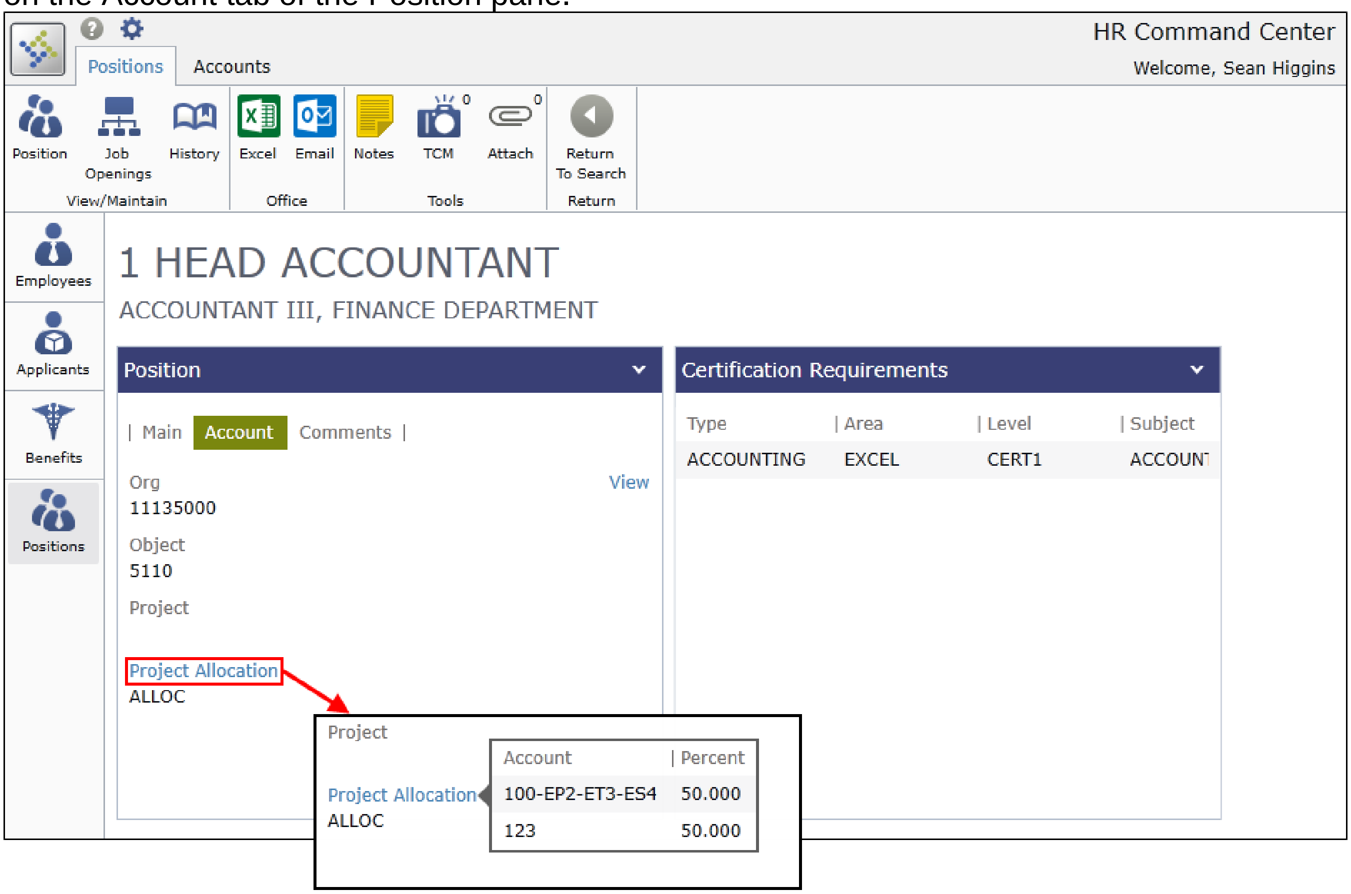
This program can be opened from the Add Employee button on the ribbon in the Employees pane or the Hire button on the Pending Applicants detail pane on the Applicants pane.

Positions

In the Positions pane search results, the program displays project allocations for records that have one assigned in Position Control.



On the Detail screen for such records, the program displays the project allocation information on the Account tab of the Position pane.



In either location, click the Project Allocation text to display a window indicating the applicable accounts and their respective allocation percentages. This information is included in the Excel export.

Munis Human Resources and Payroll for v10.5

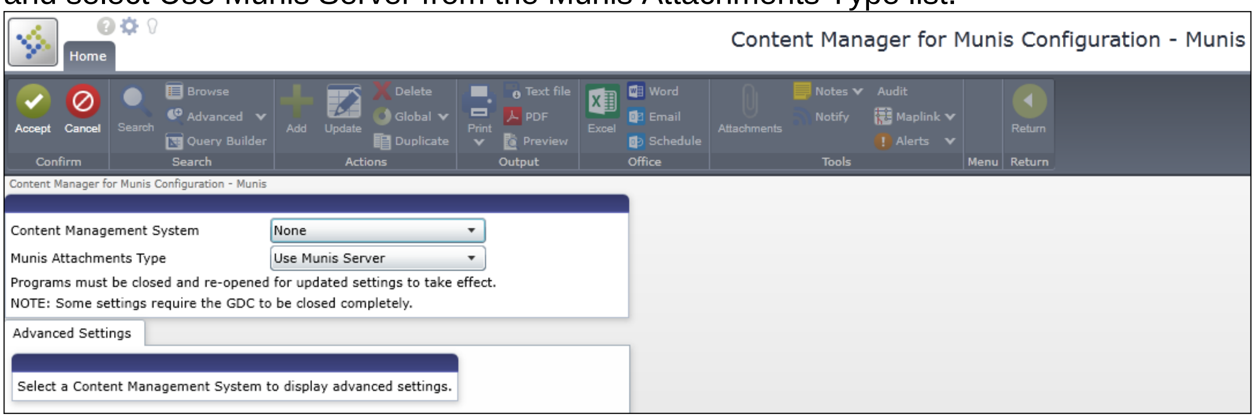
This document provides an overview of the major HR/Payroll enhancements for Munis® Version 10.5.

Attachments, Tyler Content Manager

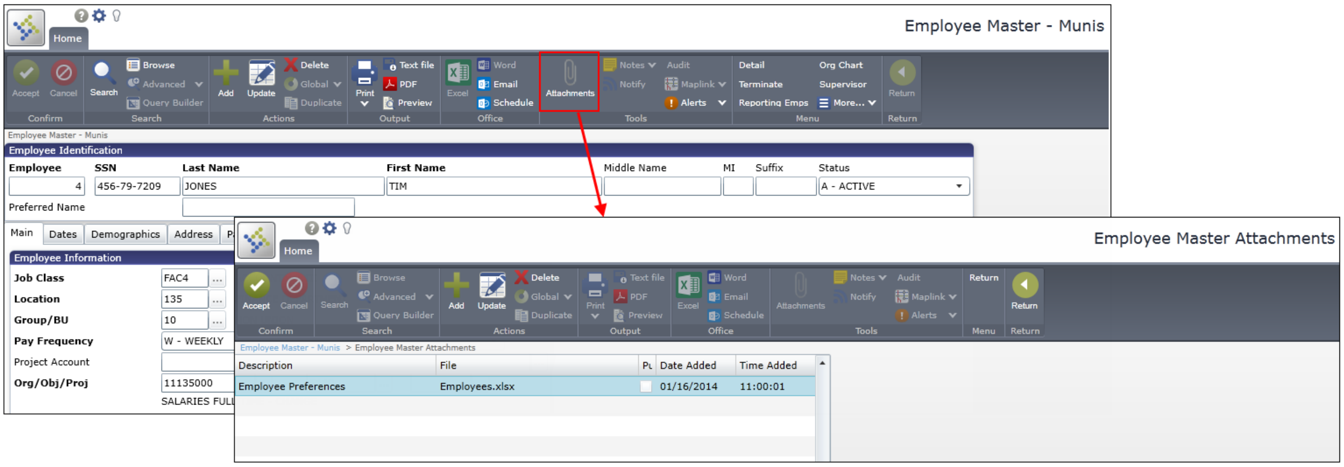
In the Tools group of the ribbon, the TCM [] button is removed and the Attachments [] button is the single option for attaching and storing documents in Munis.

To use either attachment process in Munis, you must ensure that in the Roles – Munis System program, the View Attachments and Associated Documents check box is selected. This permission makes the Attachments button accessible on the ribbon.

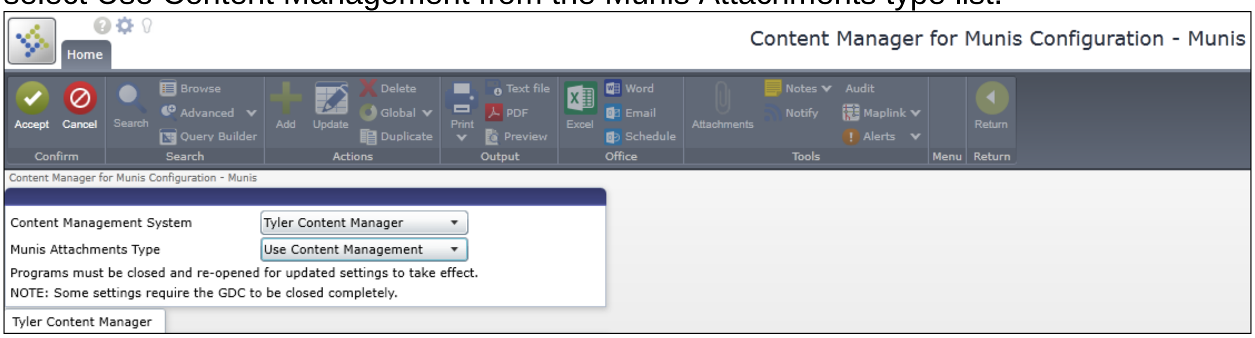
To use the standard Munis attachments screen and store documents on your Munis server, in the TylerCM for Munis Settings program, select None from the Content Manager System list and select Use Munis Server from the Munis Attachments Type list.



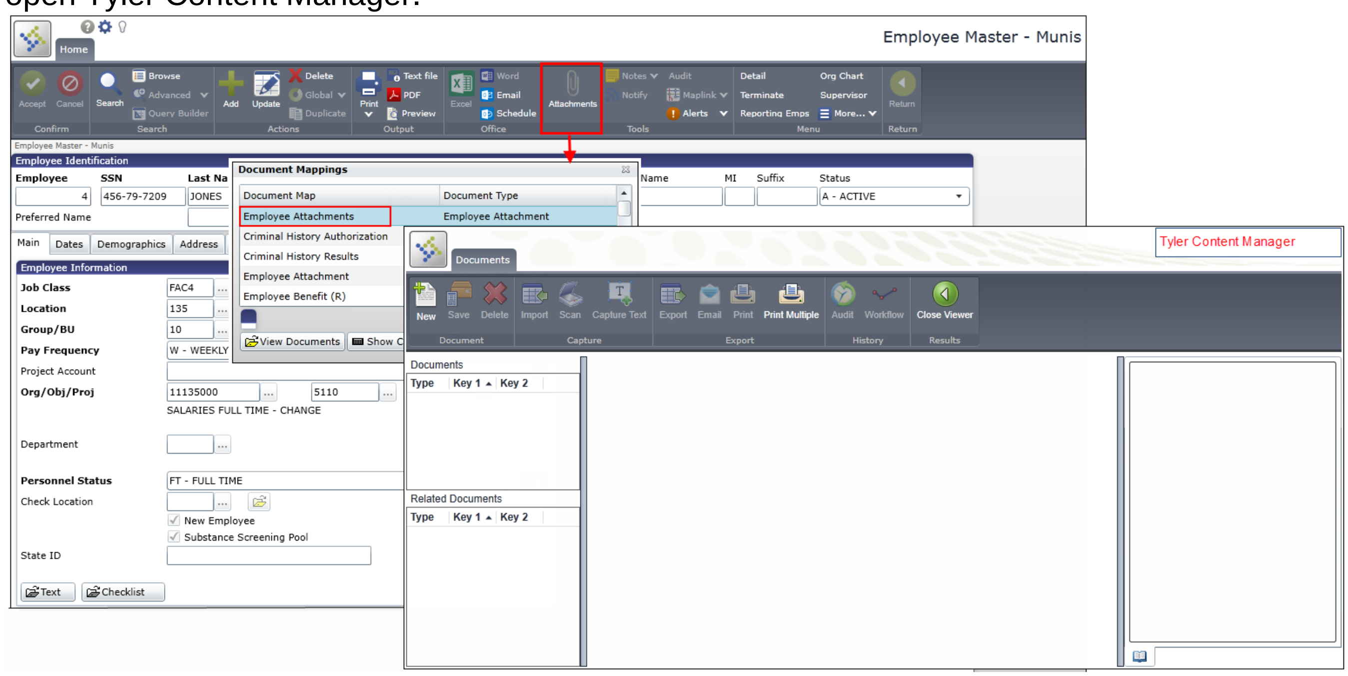
In this case, when you click Attachments in the ribbon, the program displays the standard Munis Attachments screen, where you can attach new document files or maintain existing attachments.



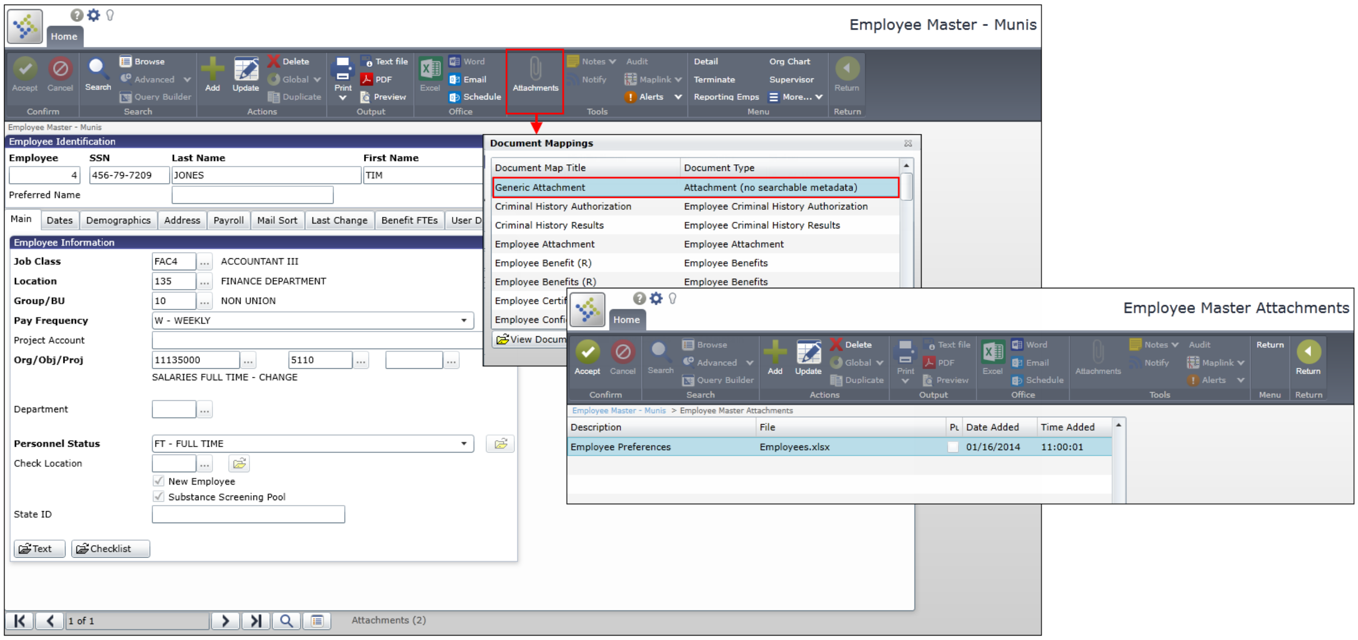
To use Tyler Content Manager to store and retrieve documents, in the TylerCM for Munis Settings program, select Tyler Content Manager from the Content Manager System list and select Use Content Management from the Munis Attachments type list.



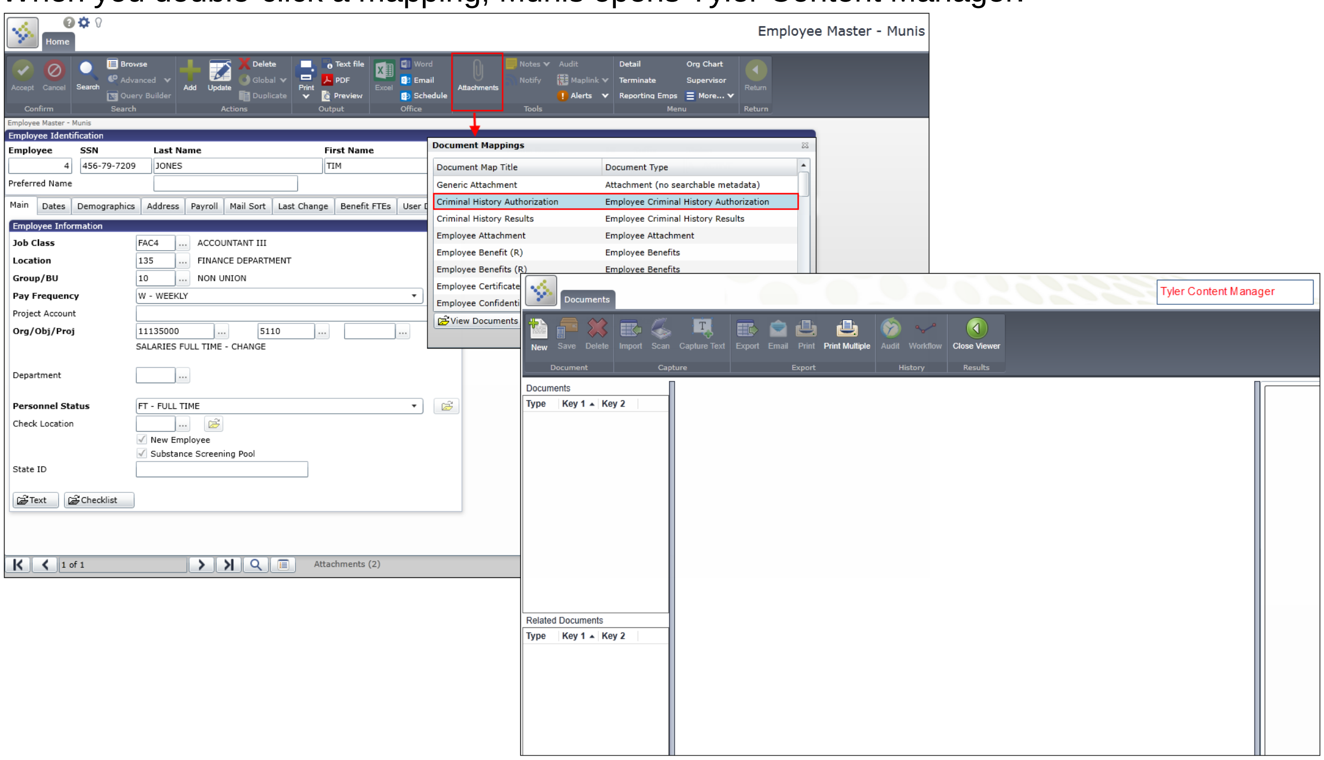
In this case, when you click Attachments, Munis provides the Document Mappings box. Double-click a document map type or highlight a document map and click View Documents to open Tyler Content Manager.



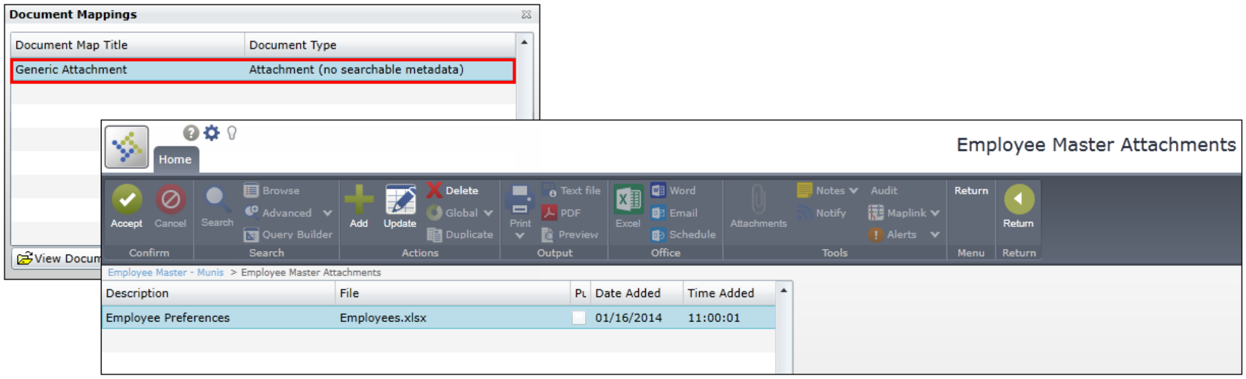
If your organization uses Tyler Content Manager and in the TylerCM for Munis Settings program, the value of the Content Manager System list is Tyler Content Manager and the value of the Munis Attachment Type list is Use Munis Server, when you click Attachments, the Munis program displays the Document Mappings dialog box. When you double-click Generic Attachment, Munis provides the standard Munis attachments screen.



When you double-click a mapping, Munis opens Tyler Content Manager.



If your organization does not use Tyler Content Manager, but the settings in the TylerCM for Munis Settings program are set to Tyler Content Manager and Use Munis Server, when you click Attachments, Munis provides the Document Mappings box with only the Generic Attachment option available.



Double-click this option, or highlight the option and click View Documents, to display the standard Munis Attachments screen.

Once you open either Munis Attachments or Tyler Content Manager, the procedures for managing attachments within those applications have not changed.

Note: If your organization uses Laserfiche®, the TCM button remains available and there are no changes to the access or use of your content management system.

Human Resources for v10.5

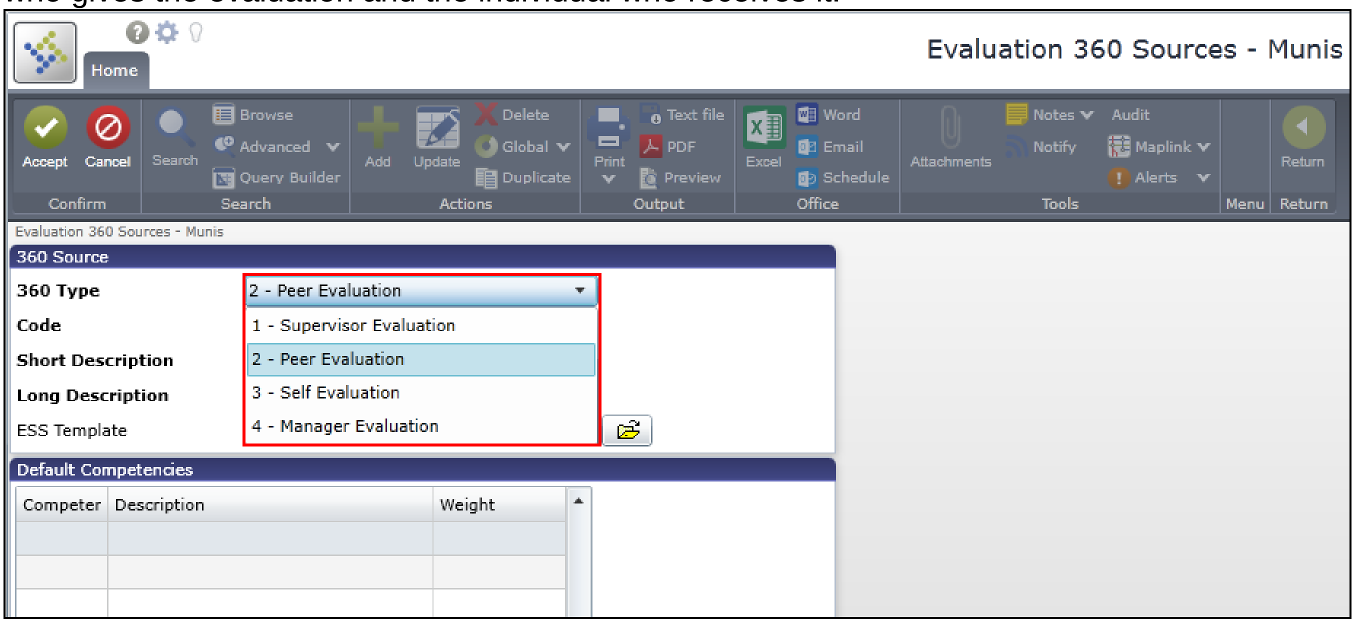
The following changes apply to Munis Human Resources programs.

360° Evaluations

The Munis evaluations programs have been enhanced to include 360° evaluation functionality. This functionality enables employees with access to Employee Self Service to complete evaluations for themselves, their peers, and their managers.

360 Type

In the Evaluation 360 Sources program, the 360 Type list defines the 360° evaluation type for an evaluation form. The evaluation type determines the relationship between the individual who gives the evaluation and the individual who receives it.

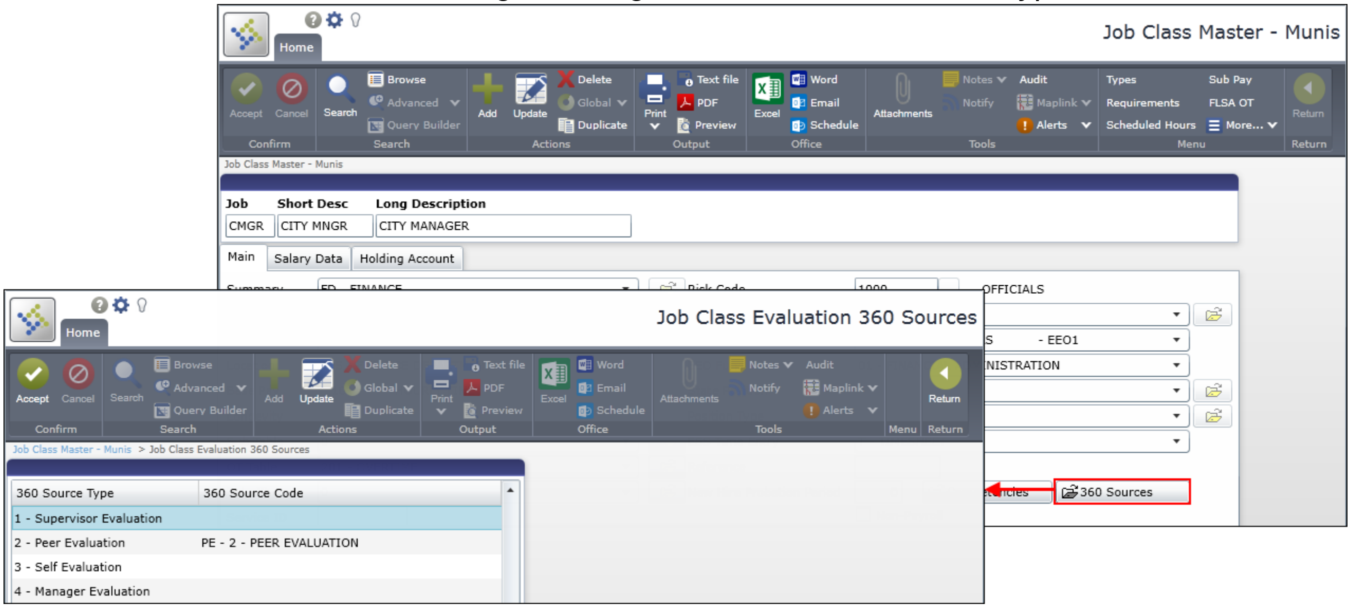


Type	Evaluates
1 – Supervisor	A subordinate
2 – Peer Evaluation	Employees with the same supervisor
3 – Self Evaluation	Yourself
4 – Manager Evaluation	Your supervisor

You can create more than one evaluation form for each 360° evaluation type. For example, you can configure multiple forms, each designated by a unique 360 code, and select the peer 360° evaluation type for all of them.

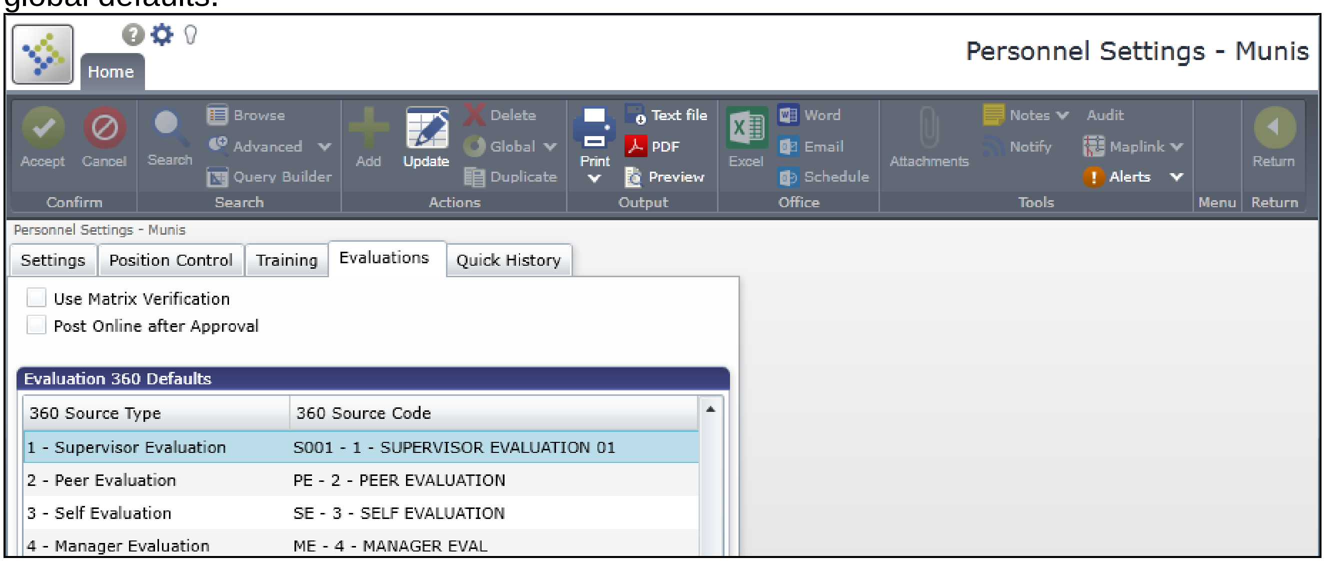
Default Forms for 360° Evaluation Types

The 360 Sources button in Job Class Master displays the Evaluation 360 Sources screen. Use this screen to define the default evaluation forms for the active job class. You must select the default forms that ESS uses when generating different 360° evaluation types.



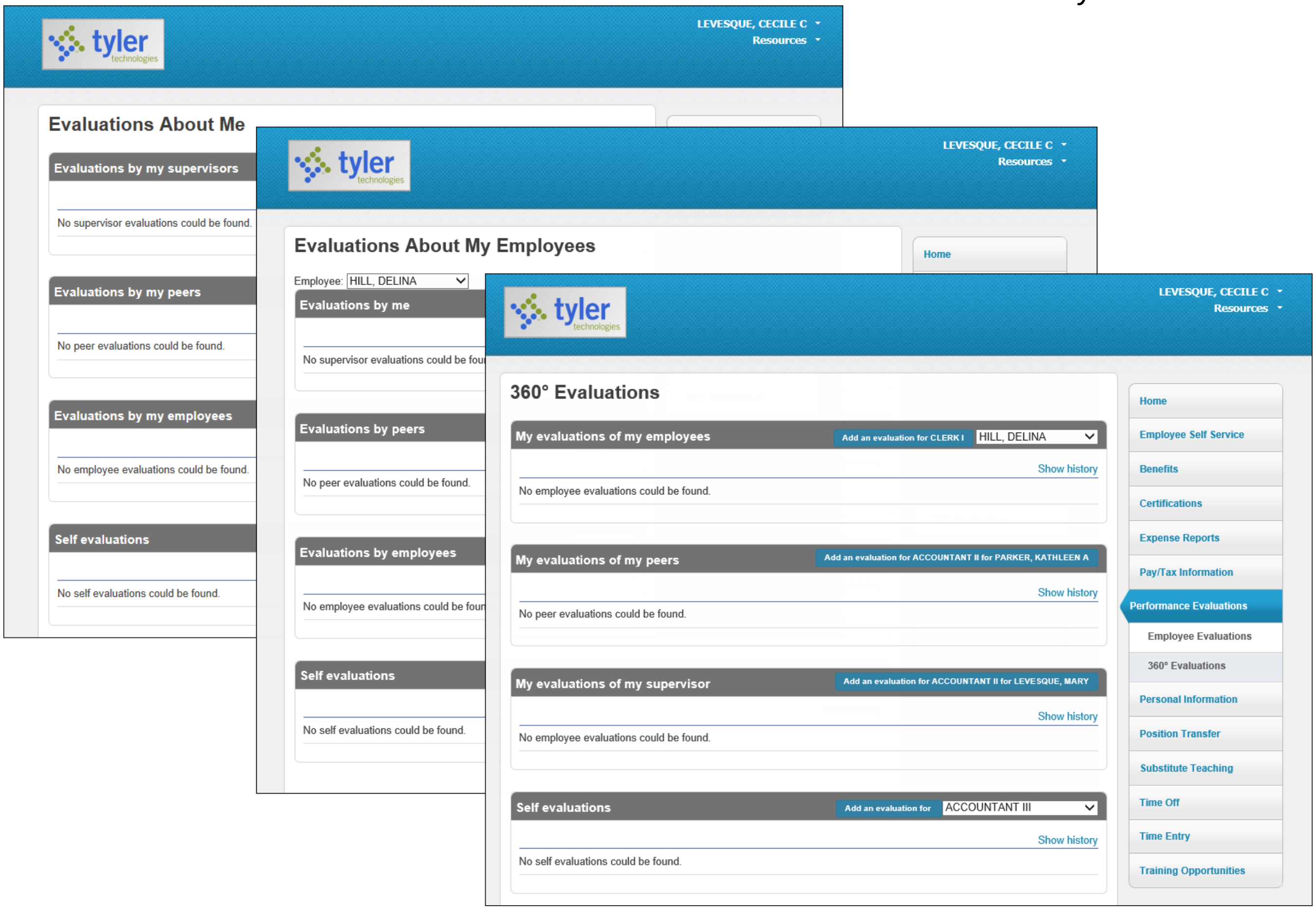
Select a default form for a 360° evaluation type by clicking the 360 source code list and indicating the source code that identifies the appropriate form. When you give an evaluation to an employee with the active job class, ESS uses the form you define here.

If you do not define a default form for a 360° evaluation type in Job Class Master, ESS uses the global default. Use the Evaluations tab in the Personnel Settings program to identify the global defaults.



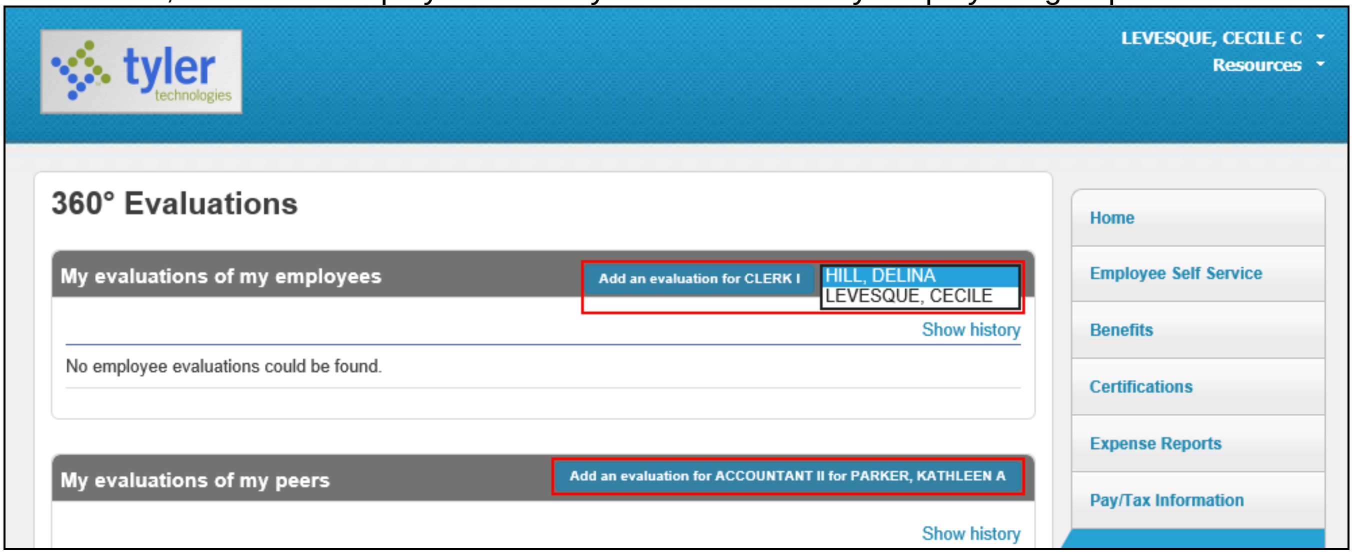
ESS Performance Evaluations

ESS Performance Evaluations accommodates the 360° evaluation functionality.



- The Performance Evaluations option on the ESS menu displays the Evaluations About Me page, which lists evaluations that have been given to you. The evaluations are grouped according to who performed them: your supervisors, your peers, your employees, and yourself.
- The Employee Evaluations option on the ESS menu displays the Employee Evaluations page, which lists evaluations given to your employees. Select a name from the Employee list to display the evaluations for that employee. Evaluations are grouped according to who performed them.
- The 360° Evaluations page lists all the evaluations you have given, grouped by recipient.

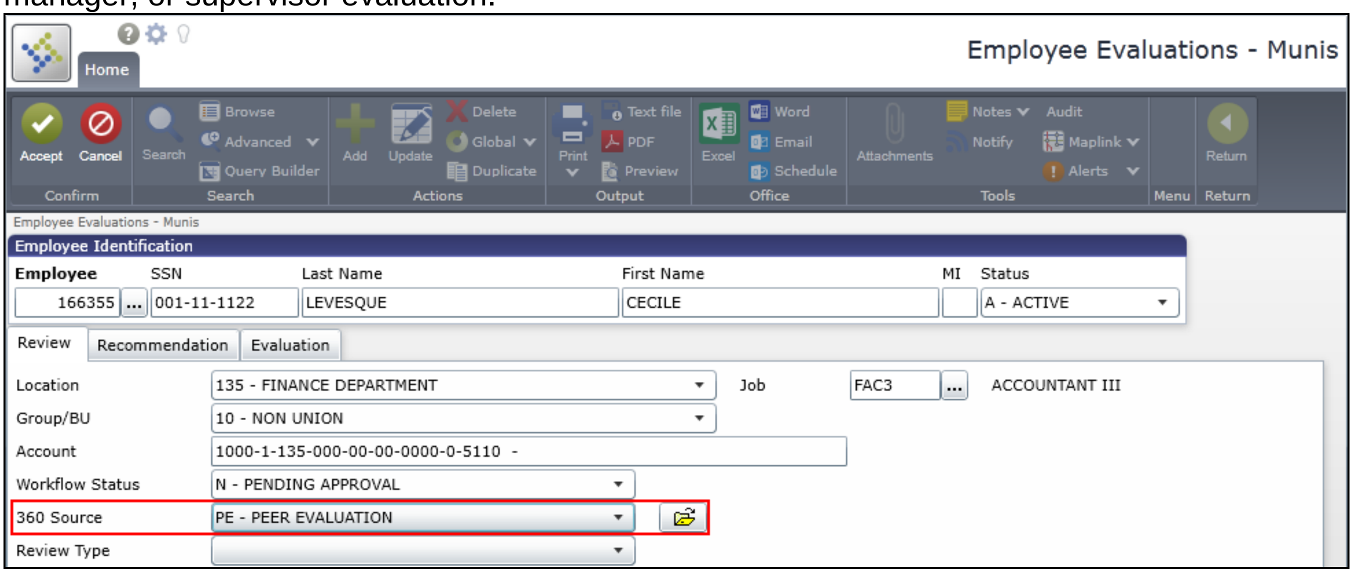
If you have permission to perform an evaluation, the header for the pertinent group includes the Add an Evaluation For button. For example, if you have permission to perform employee evaluations, this button displays for the My Evaluations of My Employees group.



If there is more than one individual you can evaluate, ESS displays a list that allows you to select the name of the correct individual. If the individual has more than one job class, ESS displays a list of job classes as well.

Employee Evaluation Records

When you view an evaluation record in the Employee Evaluations program, the 360 Source list indicates the evaluation type. This allows you to determine if the evaluation was a peer, self, manager, or supervisor evaluation.

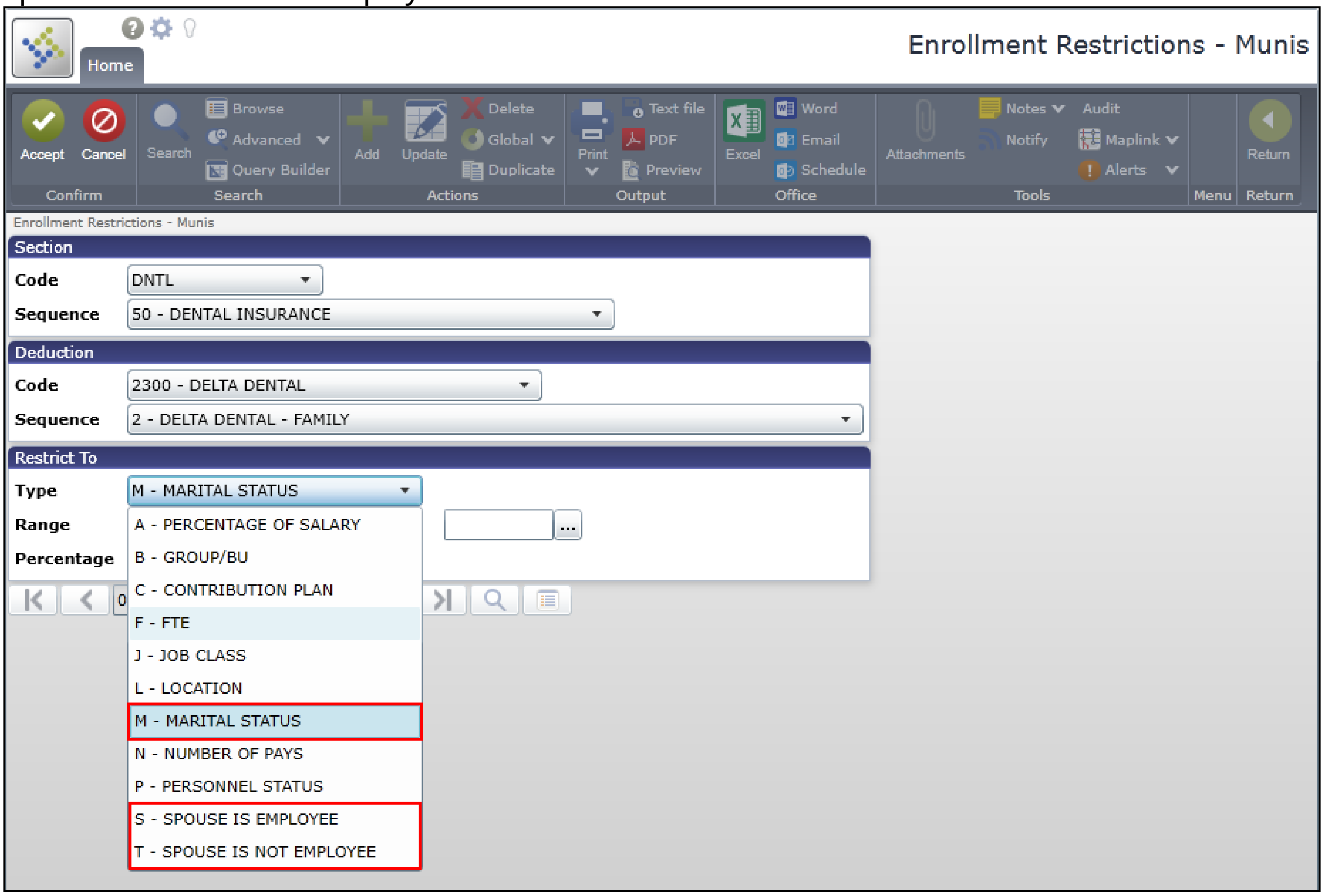


Benefits Enrollment

The Munis Benefits Enrollment programs provide greater control over the benefits enrollment process.

Marital Enrollment Restrictions

The Type list in the Enrollment Restrictions program includes options that enable you to restrict enrollment choices based on an employee's marital status or whether the employee has a spouse who is also an employee.

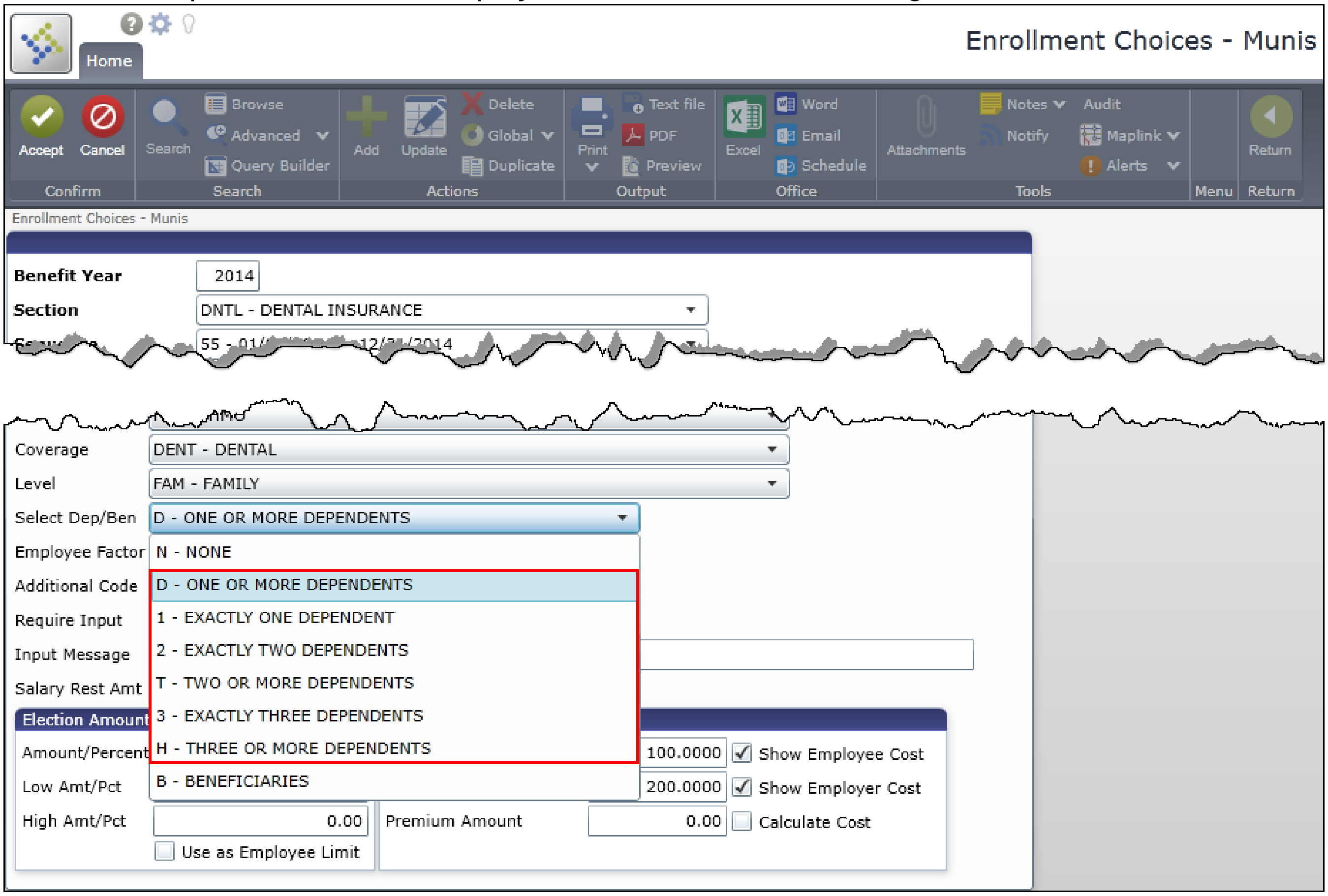


For example:

- If your organization offers a dental plan for unmarried employees, select M – Marital Status from the list. Use the Range boxes to indicate the range of acceptable marital statuses. ESS displays that benefit option to employees only when the Actual Marital Status box on their Employee Master record falls within that range.
- If your organization offers a health plan to employees with a spouse who is also an employee, select S – Spouse is Employee from this list. ESS displays that benefit option to employees only when there is an employee number entered in the Spouse box on their Employee Master record.

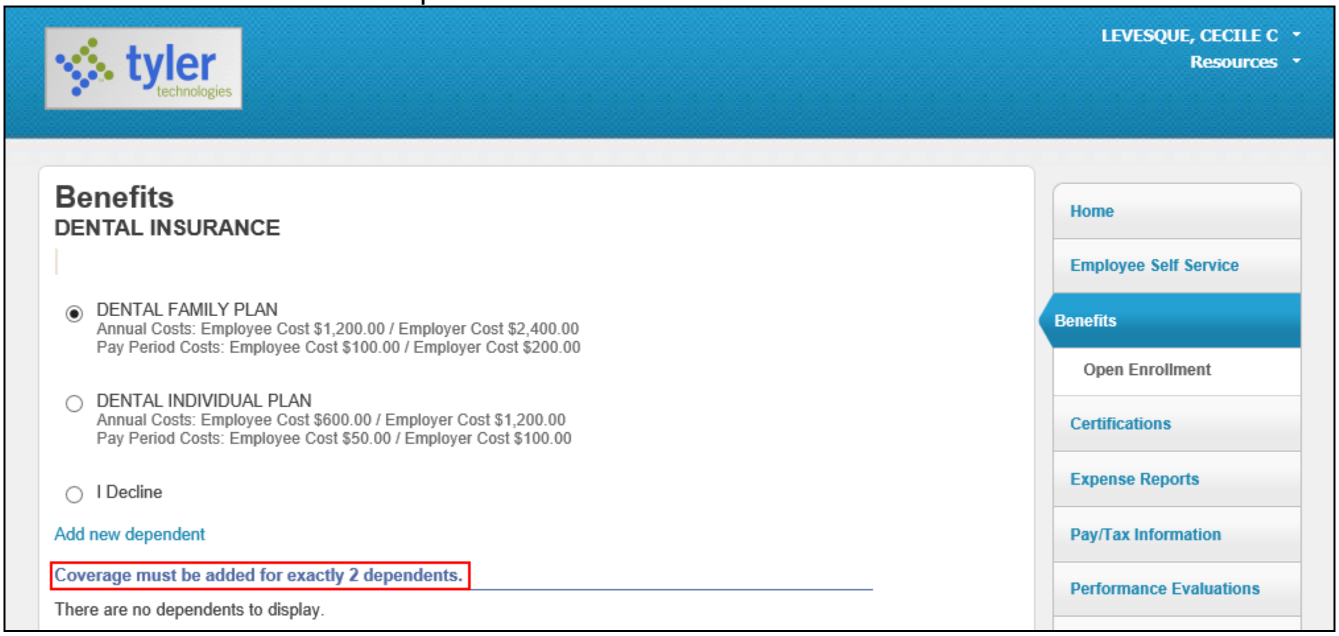
Dependent Requirements

The Select Dep/Ben list in the Enrollment Choices program provides options for specifying the number of dependents that an employee must add when selecting that enrollment choice.



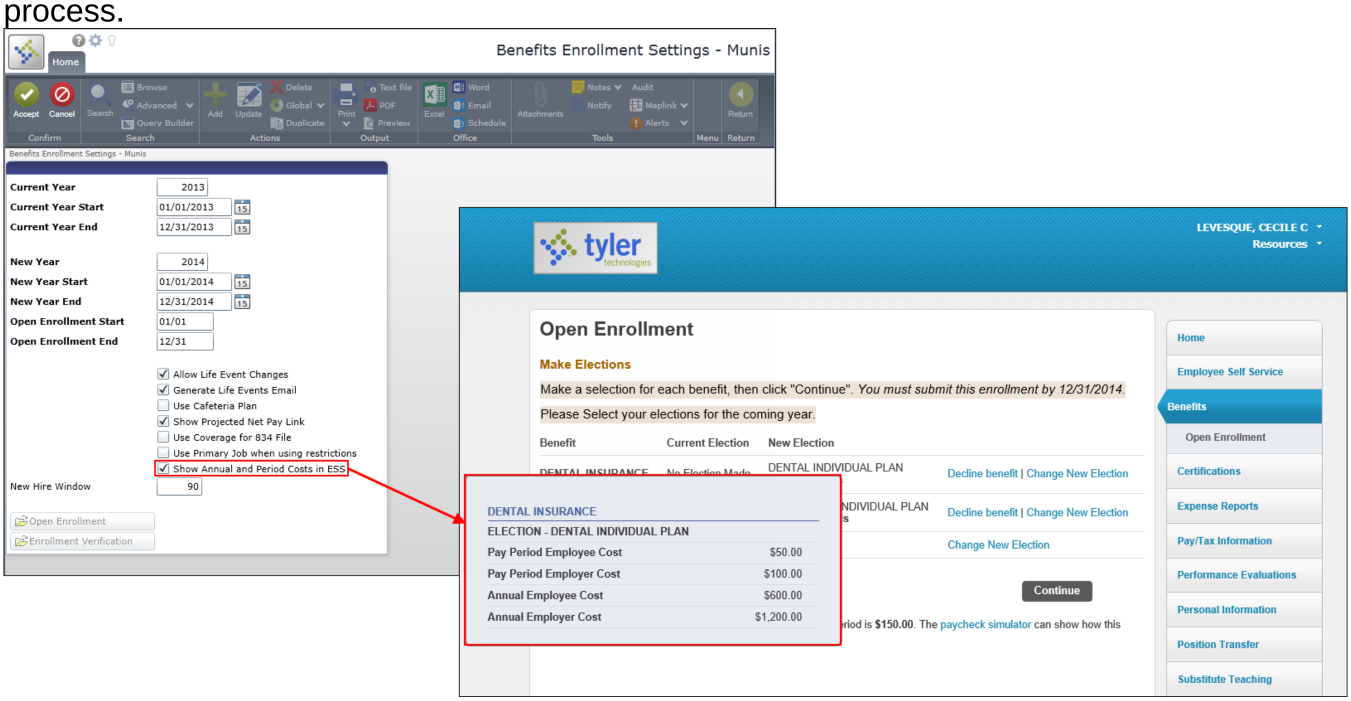
These options allow you to set more refined requirements. You can specify that the employee must select exactly one, two, or three dependents, or you can specify that the employee must select two or more, or three or more dependents. The same options are available in the corresponding list on the Additional Deductions screen.

If you have set dependent requirements for a benefit selection, ESS displays this information on all applicable screens. The program does not let the employee proceed with the selection until the correct number of dependents is defined.

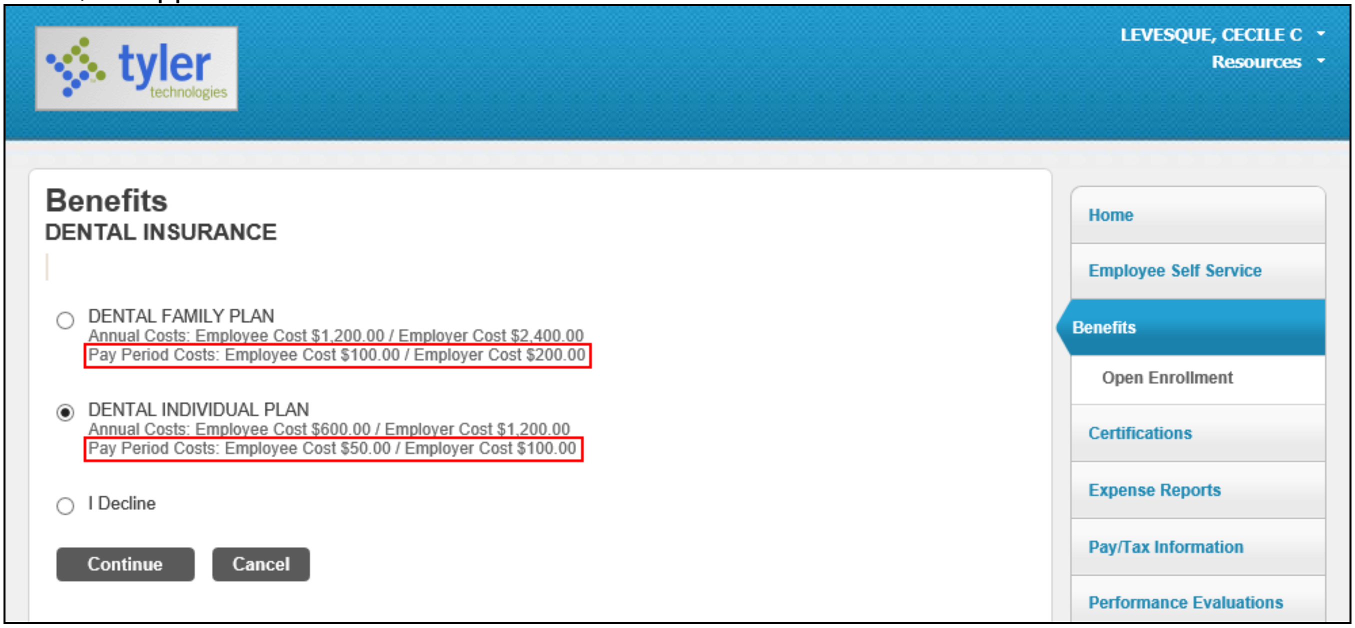


Enrollment Period Costs

The Show Annual and Period Costs in ESS option is available in the Benefits Enrollment Settings program. When you select this check box, Employee Self Service displays both annual costs and period costs for benefit selections during the enrollment process.

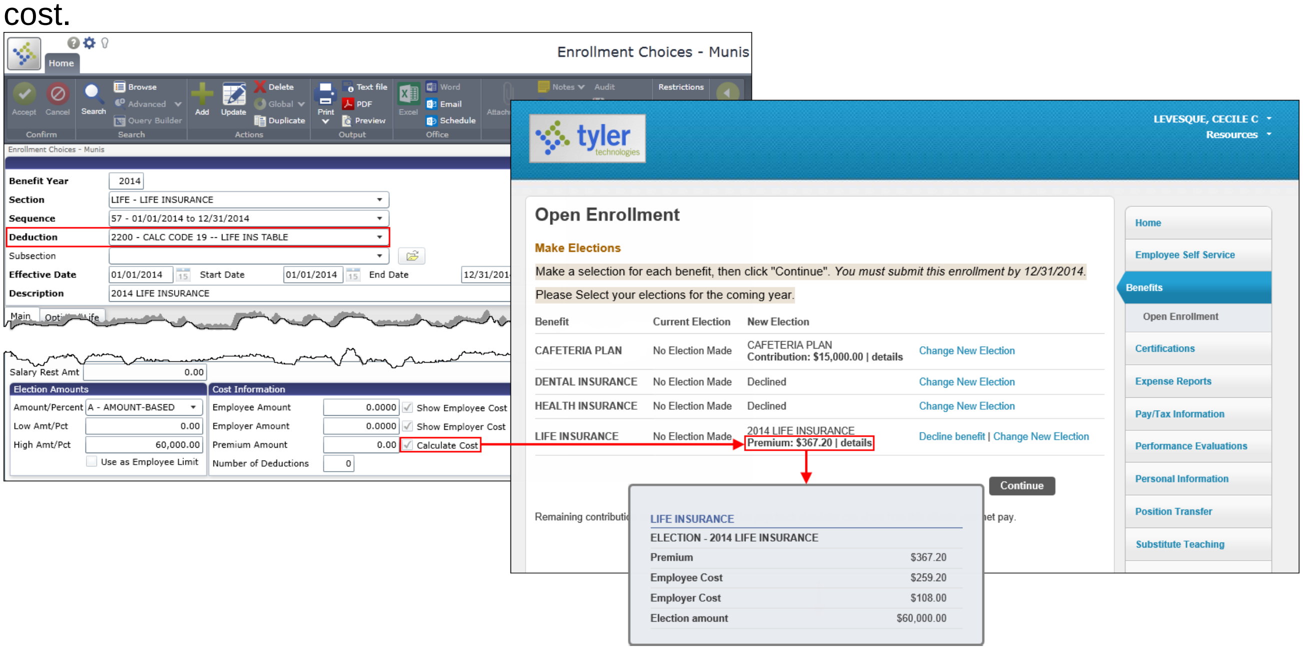


ESS provides this information in the details popup window on the main screen, on the benefits detail screen, and all applicable confirmation screens. It includes both employee and employer costs, as applicable.



Cafeteria Plan Premium Amounts

When you select the Calculate Cost check box for a cafeteria plan choice in the Enrollment Choices program, Munis automatically calculates the premium amount that each employee views for that choice in ESS. The amount is determined by adding employee and employer cost.

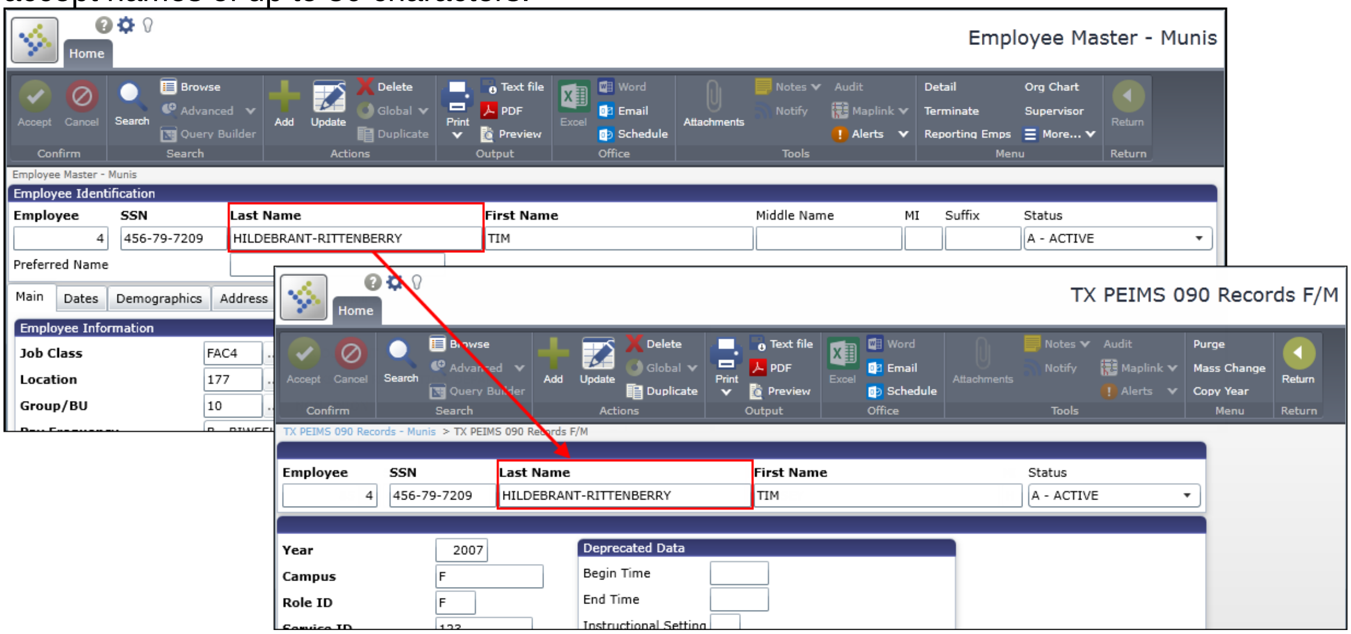


The functionality supports cafeteria plans when deductions use calc codes that use a premium table or life insurance table. As a result, when you select this check box for a benefit choice connected to a table, the premium amount is calculated for each individual user and subtracted from cafeteria amount total.

The functionality also supports benefit choices that allow employees to enter coverage amounts manually.

Employee Master First and Last Name Fields

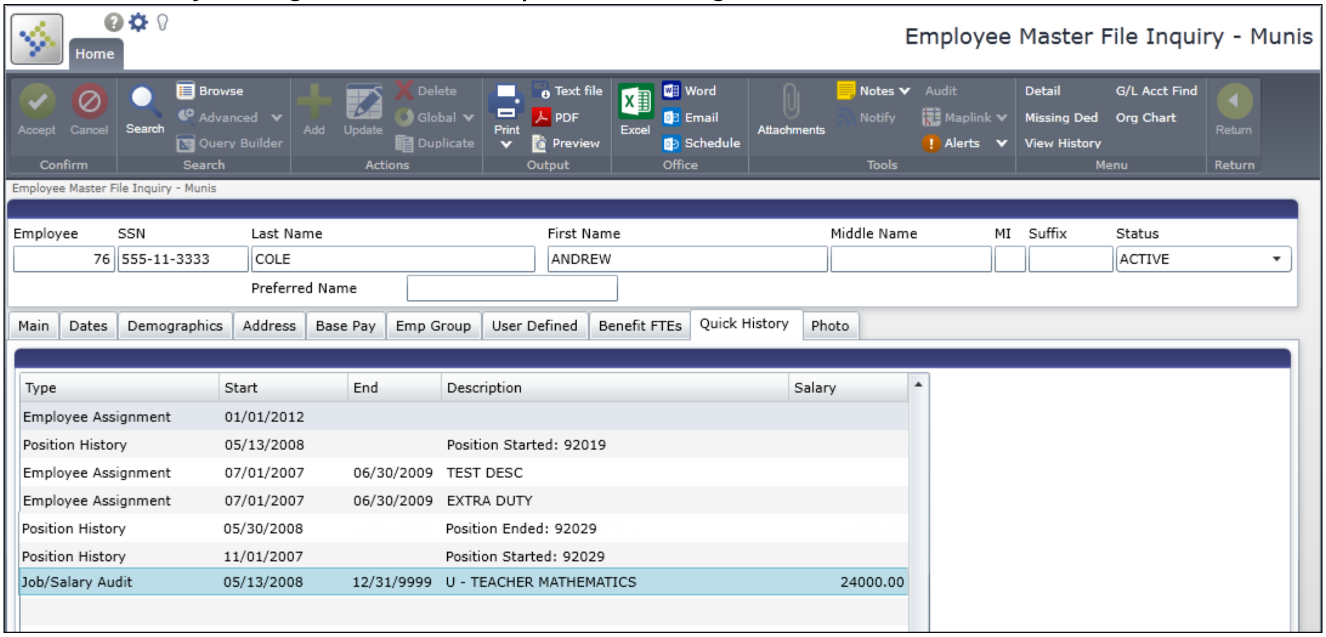
The First Name and Last Name boxes in Employee Master and all applicable Munis programs accept names of up to 30 characters.



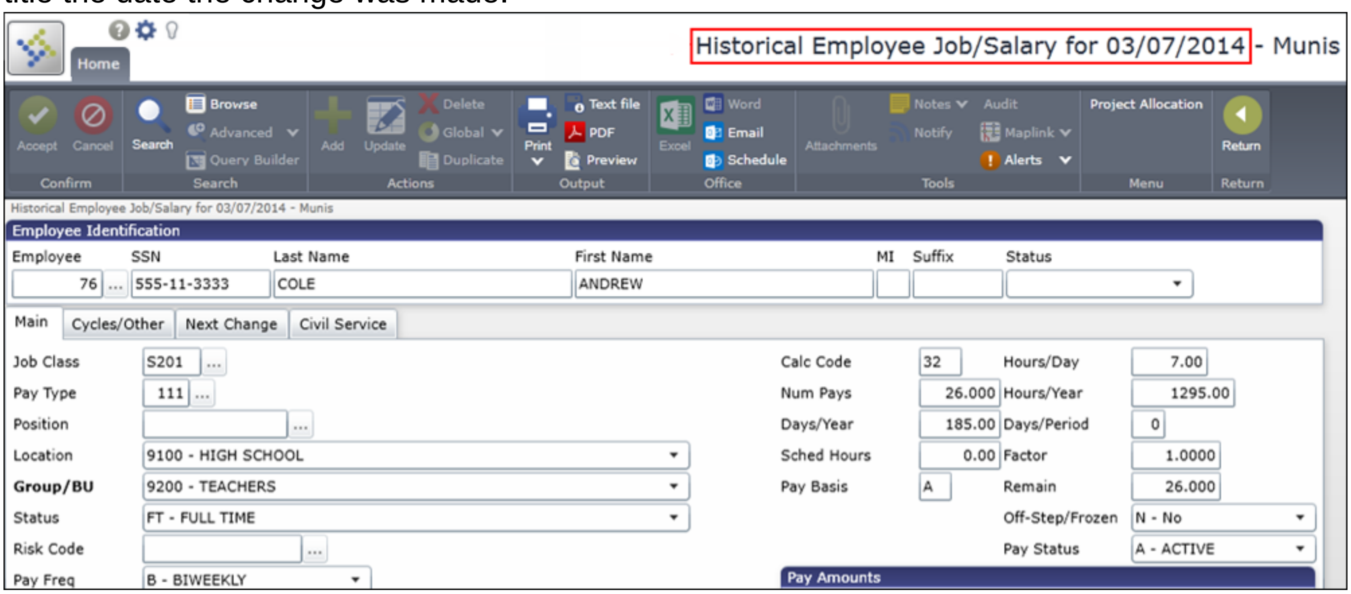
As a result, employee names display identically in all programs that include these fields, including state reporting programs. Names are also identical in all files generated by those programs. This prevents mismatch errors when you verify names on a report against Munis records.

Employee Inquiry Quick History

The Quick History tab in the Employee Inquiry program displays an overview of changes that have been made to the employee's records over time. The tab can be configured to include actions history changes, audits, and position changes.

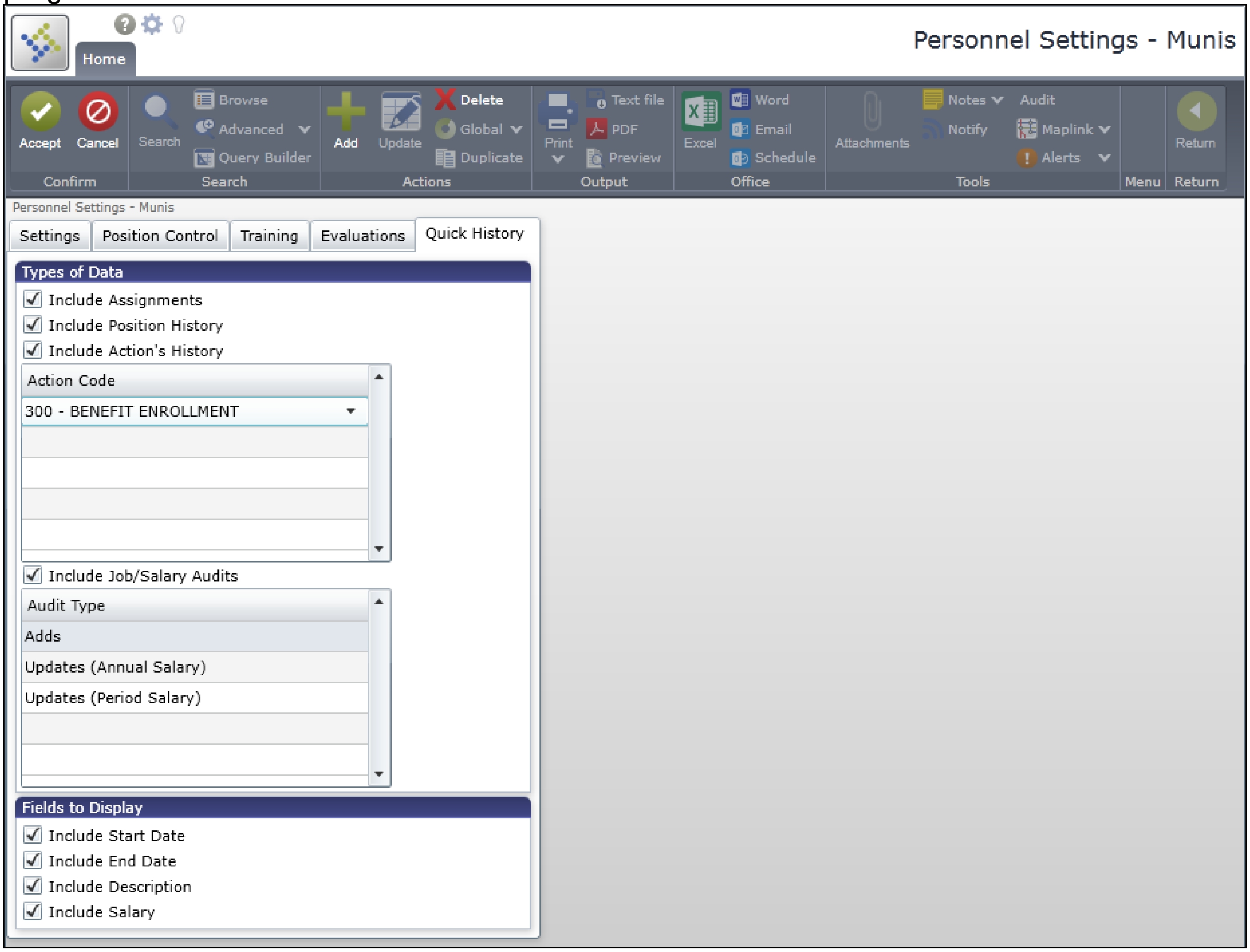


Double-click an entry to view a historical version of the record in the appropriate program. If you open a historical record for a job/salary audit entry, the program displays in the program title the date the change was made.



You cannot make updates to lines on the Quick History tab or the corresponding historical records. They are strictly for informational purposes.

To enable the tab, you must configure it using the Quick History tab in the Personnel Settings program.



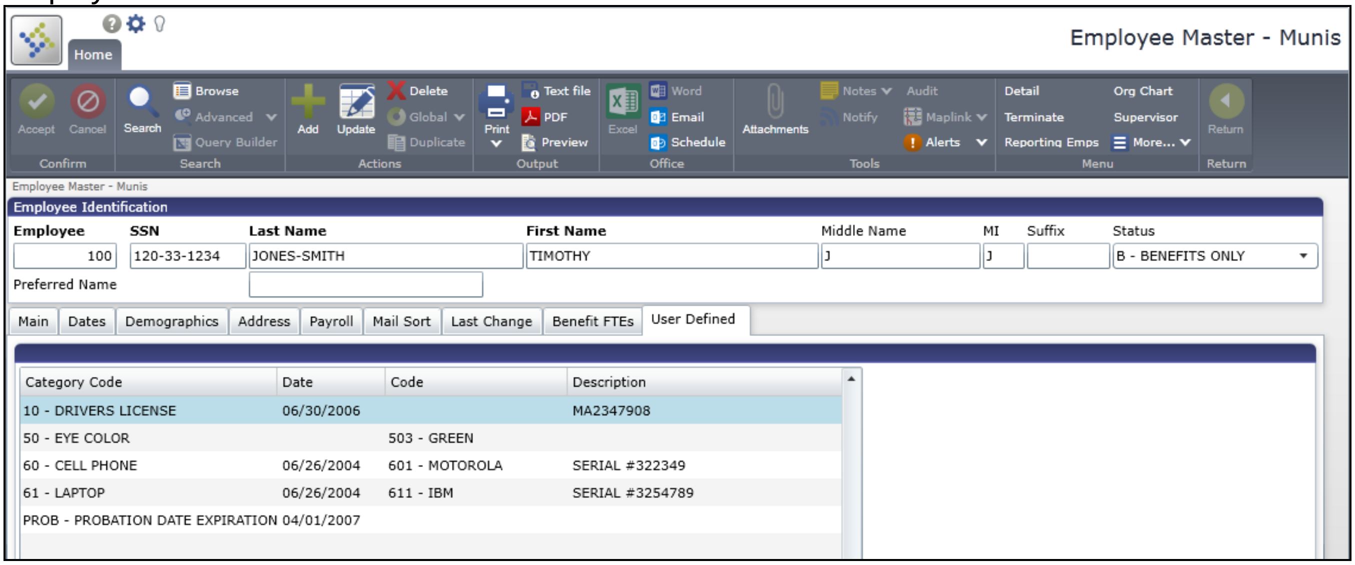
Use the check boxes to select the types of history entries provided in the list, including assignments, position history, actions history, and job/salary audits.

- If you select actions history, use the accompanying lists to specify the action codes to include.
- If you select job/salary audits, use the accompanying lists to specify the audit types to include.

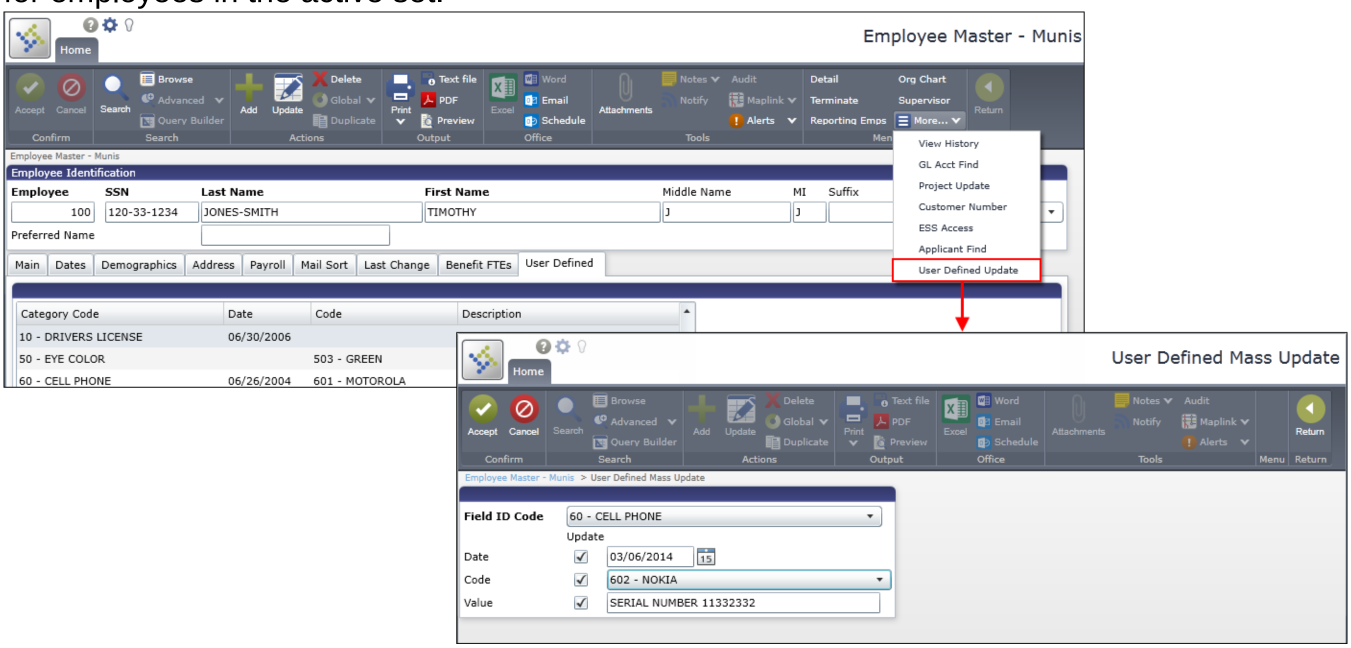
The check boxes in the Fields to Display group configure the columns that display on the Quick History tab. Options are start date, end date, description, and salary.

Employee Master User Defined Codes

The User Defined tab in Employee Master displays the user defined codes for the current employee record. These fields are searchable.



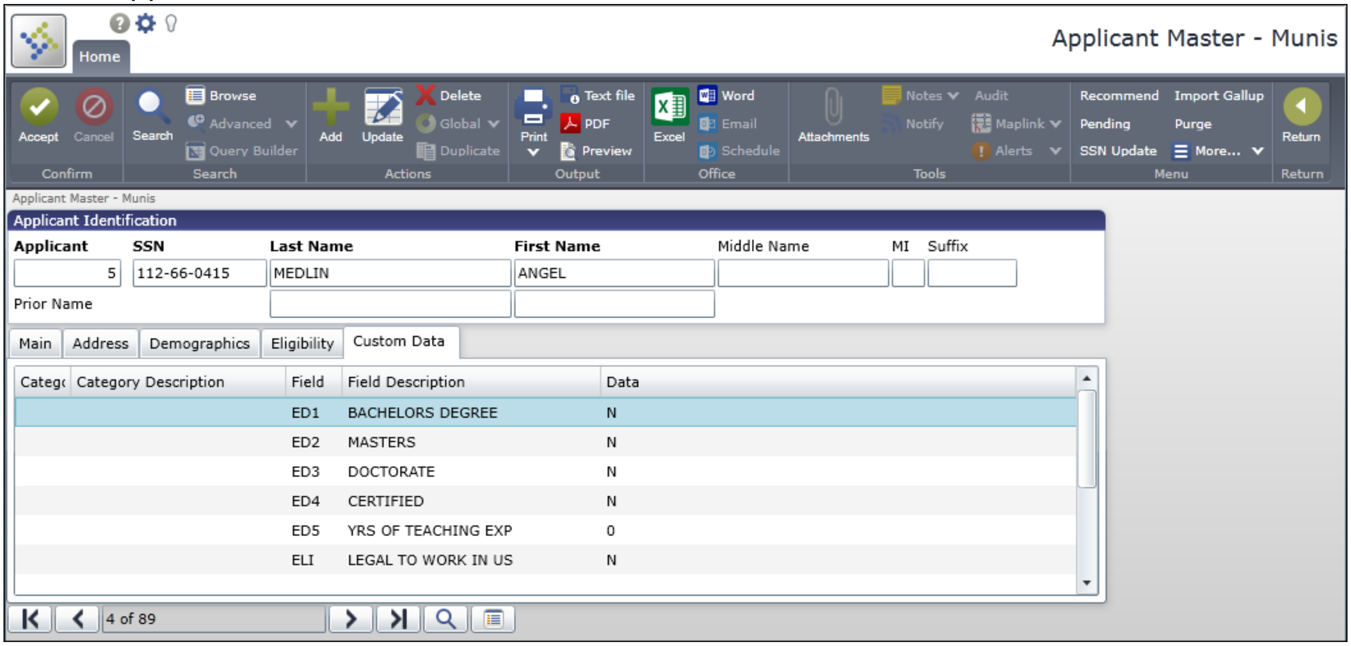
The User Defined Update option is available on the menu. Click this option to display the User Defined Mass Update screen, where you can select a field and update its date, code, or value for employees in the active set.



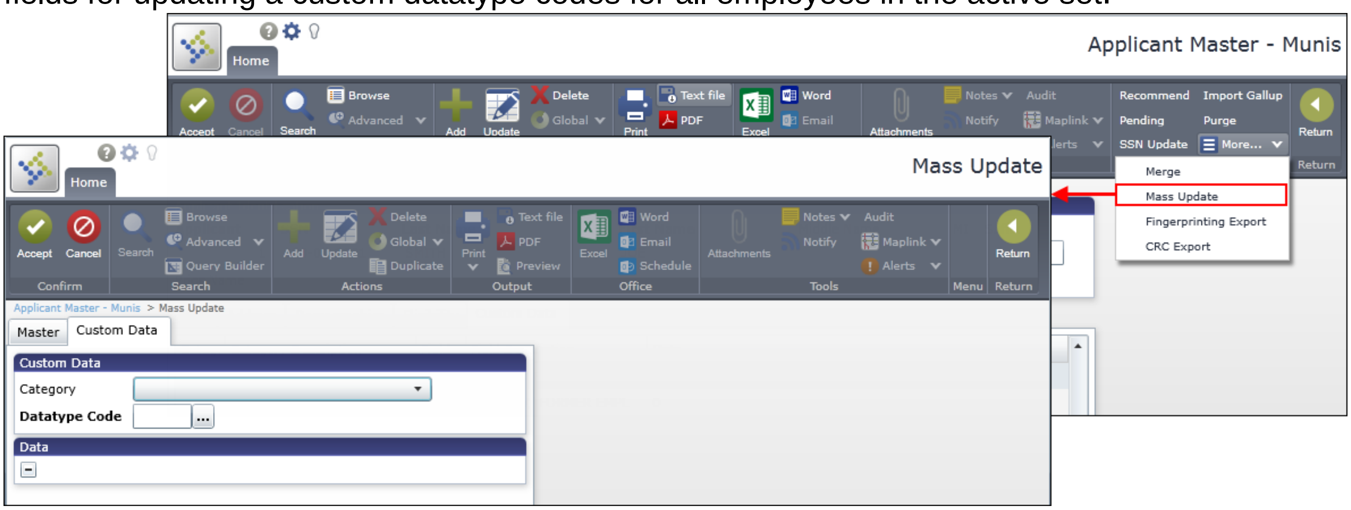
This functionality applies only to employees who already have that code on their record. You cannot use this screen to perform a mass add or mass delete.

Applicant Master Custom Datatype Codes

The Custom Data tab in Applicant Master displays the custom datatype codes defined for the current applicant record. These fields are searchable.



The Mass Update option displays the Mass Update screen, which allows you to update the values of certain fields for all records in the active set. Click the Custom Data tab to display fields for updating a custom datatype codes for all employees in the active set.

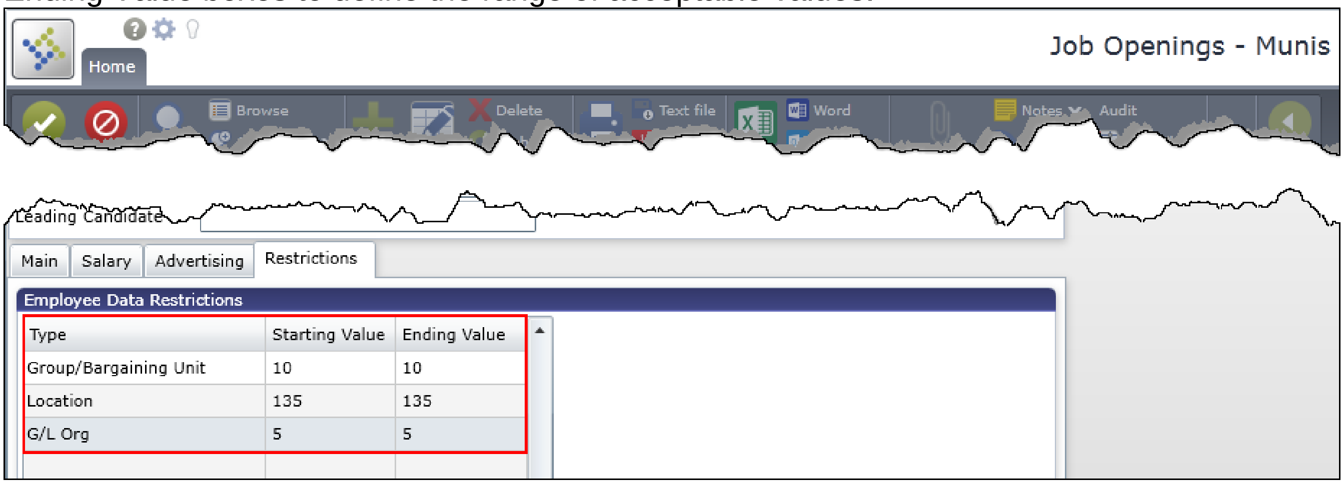


This functionality applies only to applicants who already have that code on their record. You cannot use this screen to perform a mass add or mass delete.

Job Opening Restrictions

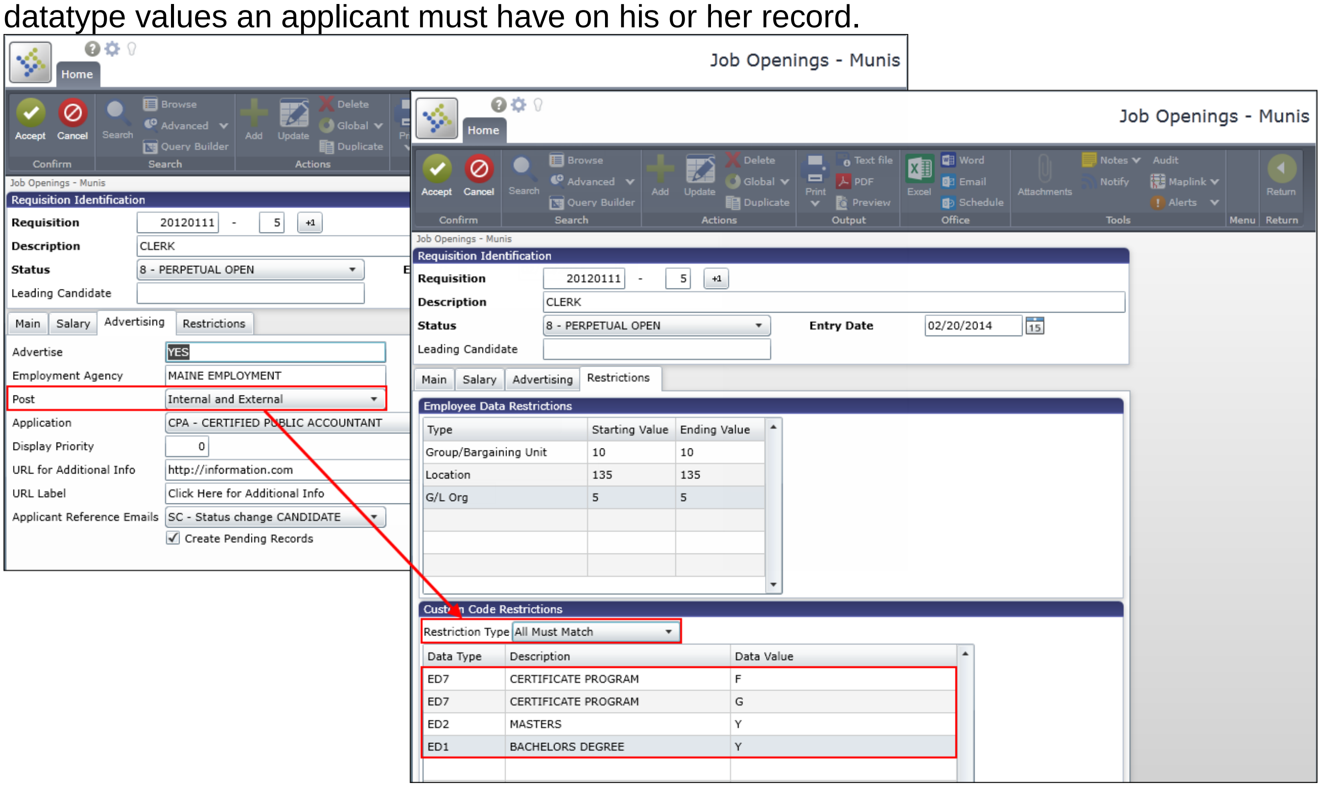
The Restrictions tab in the Job Openings program restricts which applicants can view a job opening on the Employment Opportunities page in Munis Self Service.

The fields in the Employee Data Restrictions group set restrictions based on employee data. Use the Type list to select the employee data type to use for the restriction. Options include the employee's group/BU, location, and general ledger org code. Use the Starting Value and Ending Value boxes to define the range of acceptable values.



An employee must meet all defined restrictions to see the job opening in self service. If your organization has previously existing restrictions, Munis automatically updates them to the new format.

If the Post list for a job opening is set to a value of Internal or Internal and External, the Custom Code Restrictions fields are available. These fields set restrictions for the custom datatype values an applicant must have on his or her record.



Define a restriction by selecting a datatype from the Data Type list and entering an acceptable value in the Data Value box. For example, you can select a datatype for certificate programs and then the data value for a particular program. Only applicants who have completed that program can view the job opening in self service. Use the Restriction Type list to indicate whether an applicant must meet all the custom data restrictions or only one.

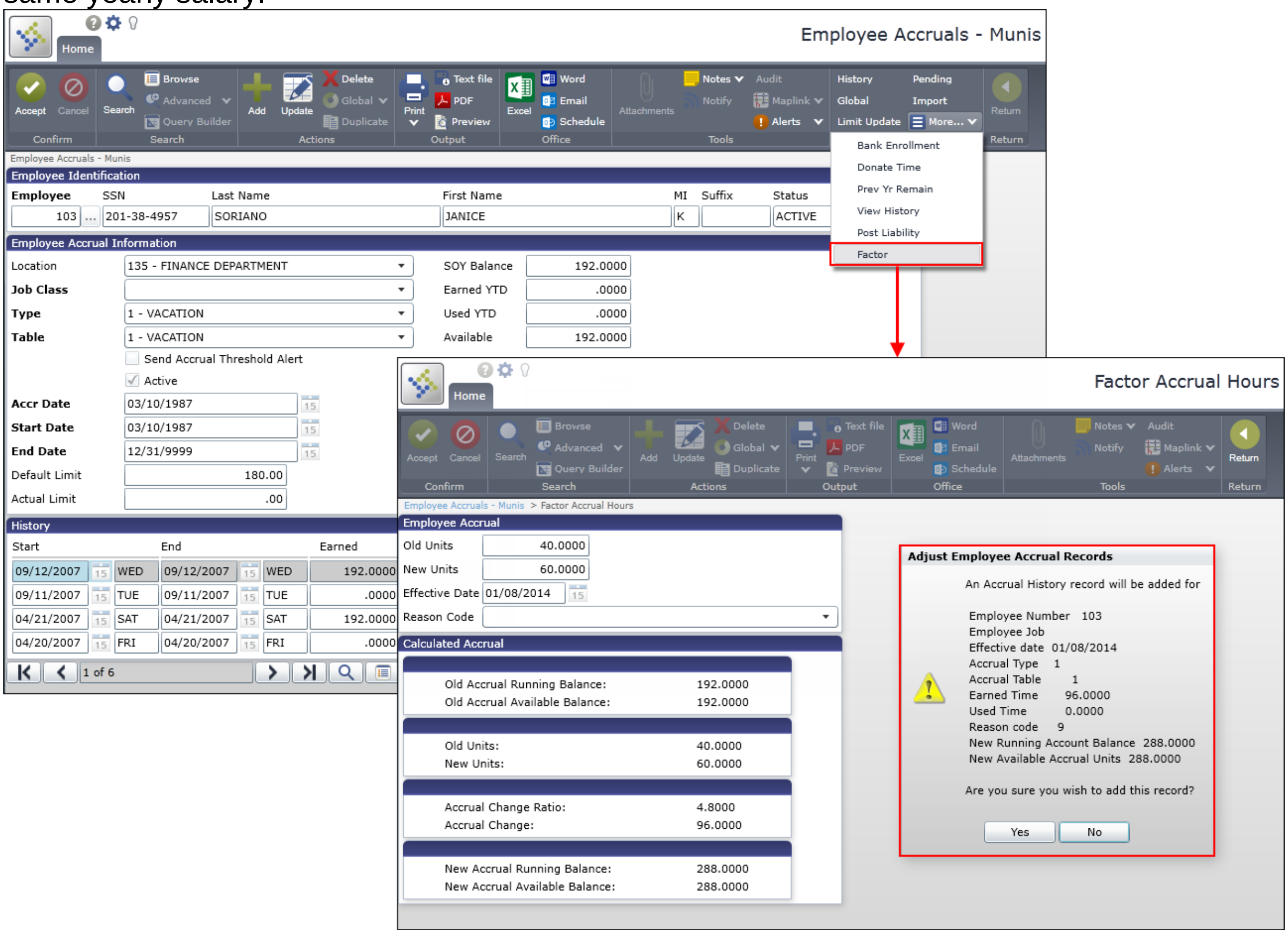
Payroll for v10.5

The following changes apply to Munis Payroll programs.

Accruals

Accrual Factoring

The Factor option in the Employee Accruals program displays the Factor Accrual Hours screen. This screen updates balances and history records for the active accrual when employees switch to a different number of hours or days worked per pay period, but retain the same yearly salary.

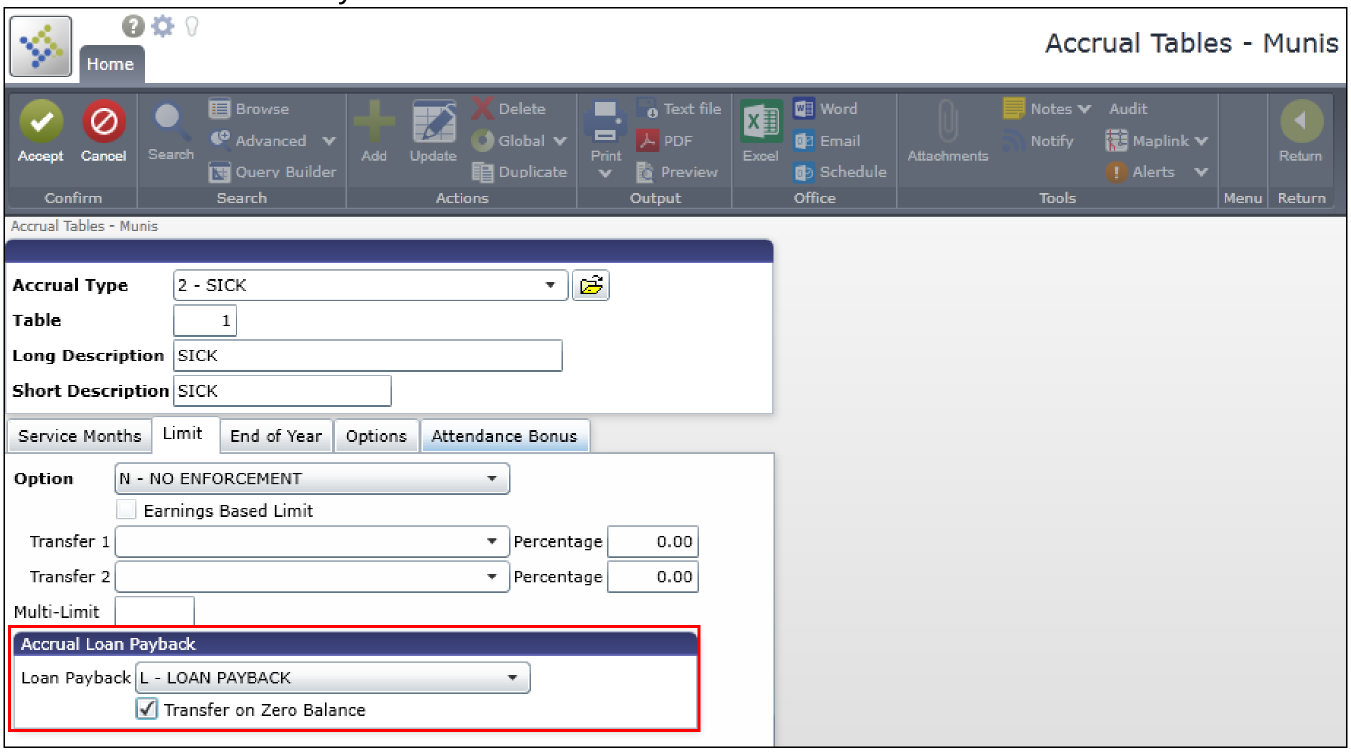


For example, if an employee moves from working 40 hours in a pay period to 60 hours in a pay period, enter 40 in the Old Units box and 60 in the New Units box. Enter the effective date and reason code for the change, as applicable. When you click Accept, the program calculates new balances for the accrual and displays the Adjust Employee Accrual Records dialog box. This dialog box presents the option of adding a history record to adjust the accrual to reflect the newly calculated balances. Click Yes to add the record.

Accrual Loans

The accrual process includes functionality for loaning accrual time to employees and processing repayment of the loaned time. Before enabling loan functionality for an accrual type, you must create a corresponding loan-payback accrual type and table.

In the Accrual Tables program, use the Limit tab to configure options for the repayment of loans that are tracked by the active table.



For example, to set up a sick time loan, open the accrual table that tracks sick time for the employees receiving the loan. Next, define the Loan Payback list and Transfer on Zero Balance options.

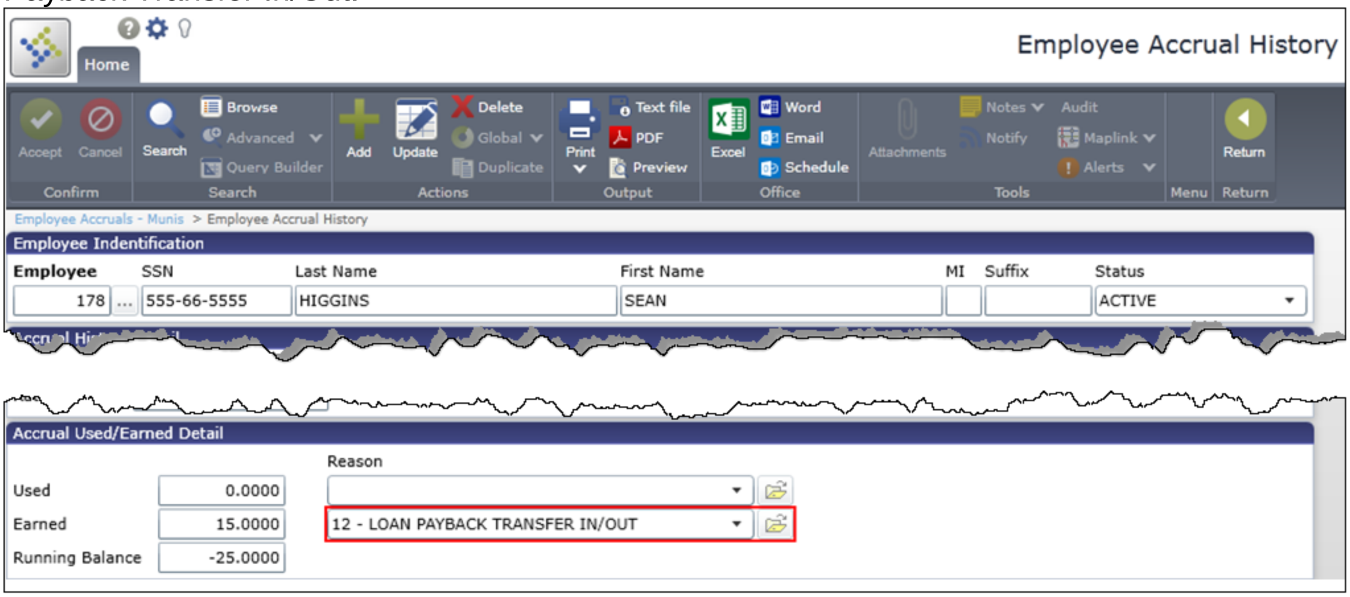
The Loan Payback list identifies the type of accrual used to track loan payback. Selecting an accrual type directs the program to check for existing loan records when calculating an employee's accrual balances. If a loan exists, new time accrued is paid toward the loan.

The Transfer on Zero Balance check box configures how accrual time earned by an employee is paid to their loan, if one exists:

- When you select the check box, newly earned accrual time is paid toward the loan only after the employee uses all available time and has a zero balance.
- When you do not select the check box, newly earned accrual time is paid toward the loan regardless of the employee's balance.

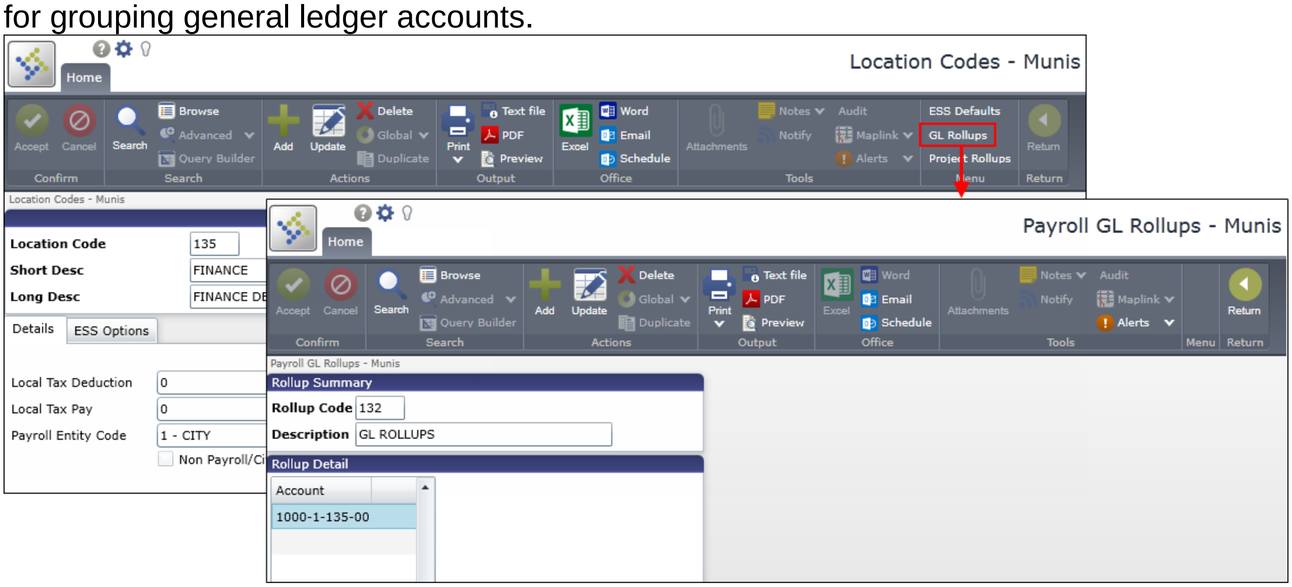
If this check box is selected, an employee who starts a payroll with available accrual time and earns additional accrual time at the end of the payroll would not make a payment because they have more than zero hours available. For example, an employee who starts a payroll with 5.7 hours available and earns 2.3 hours at the end of the payroll makes no payments toward the loan and carries forward an available balance of 8 hours. However, if during the next payroll, the employee uses all 8 hours in the balance and then earns another 2.3 hours at the end of the payroll, these newly earned hours are applied to the loan. This is because the employee's balance prior to earning those hours was zero.

When an employee's accrual hours are applied to a loan as payment, these transactions are recorded in a new accrual history record on both the loan-payback accrual and the original accrual that was loaned. The repayment records are marked with a reason code of 12 – Loan Payback Transfer In/Out.

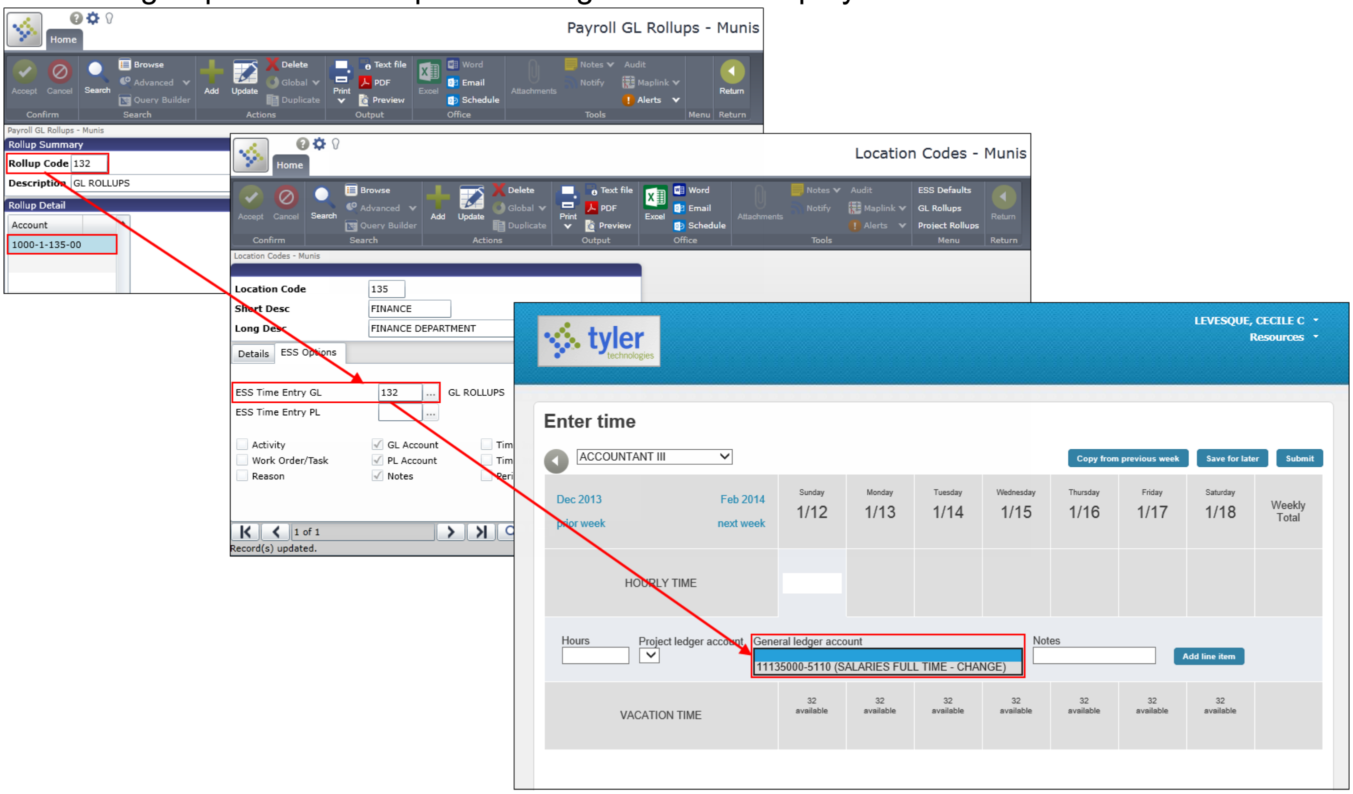


GL Rollups for ESS

In the Location Codes program, the GL Rollups option is available. When you select this option, the program displays the Payroll GL Rollups screen, where you can define rollup codes for grouping general ledger accounts.

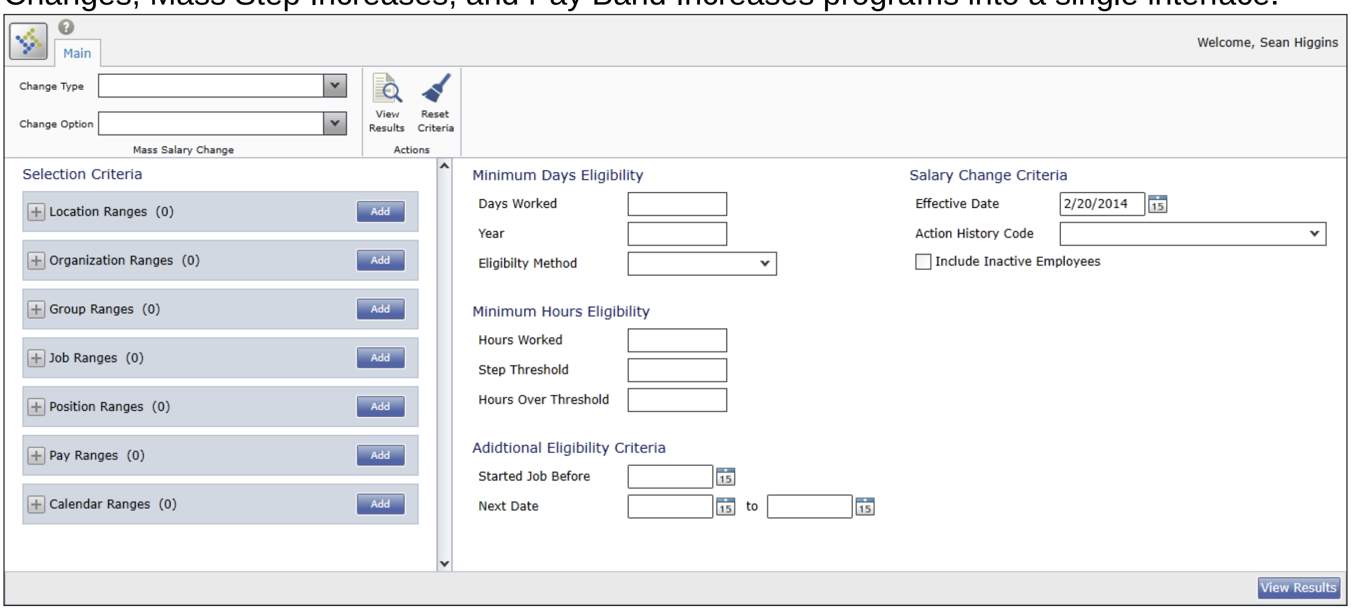


Once you have created the rollup codes, use the ESS Time Entry GL box on the ESS Options tab to assign one or more rollup codes to a specific location. When employees are entering time in ESS Time Entry, the General Ledger Account list includes all the general ledger accounts grouped in the rollup code assigned to that employee's location.



Mass Salary Change

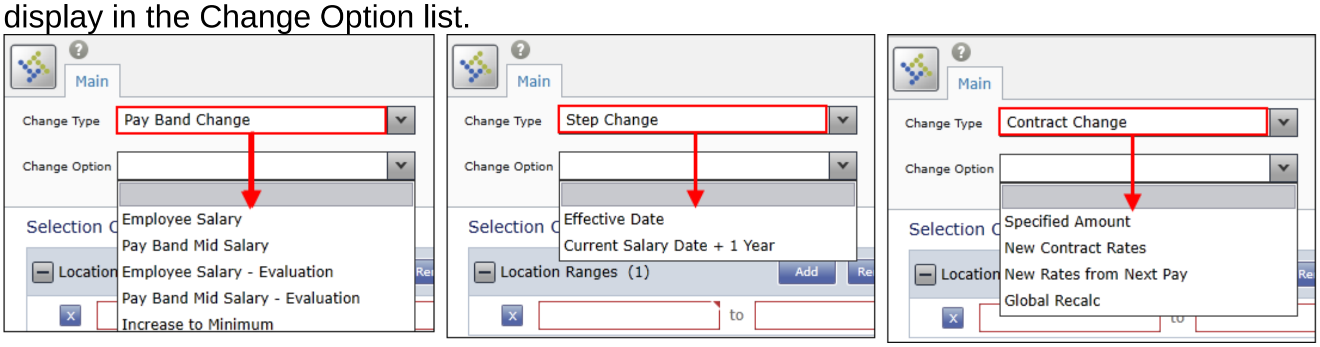
The updated Mass Salary Change program combines the functionality of the Mass Contract Changes, Mass Step Increases, and Pay Band Increases programs into a single interface.



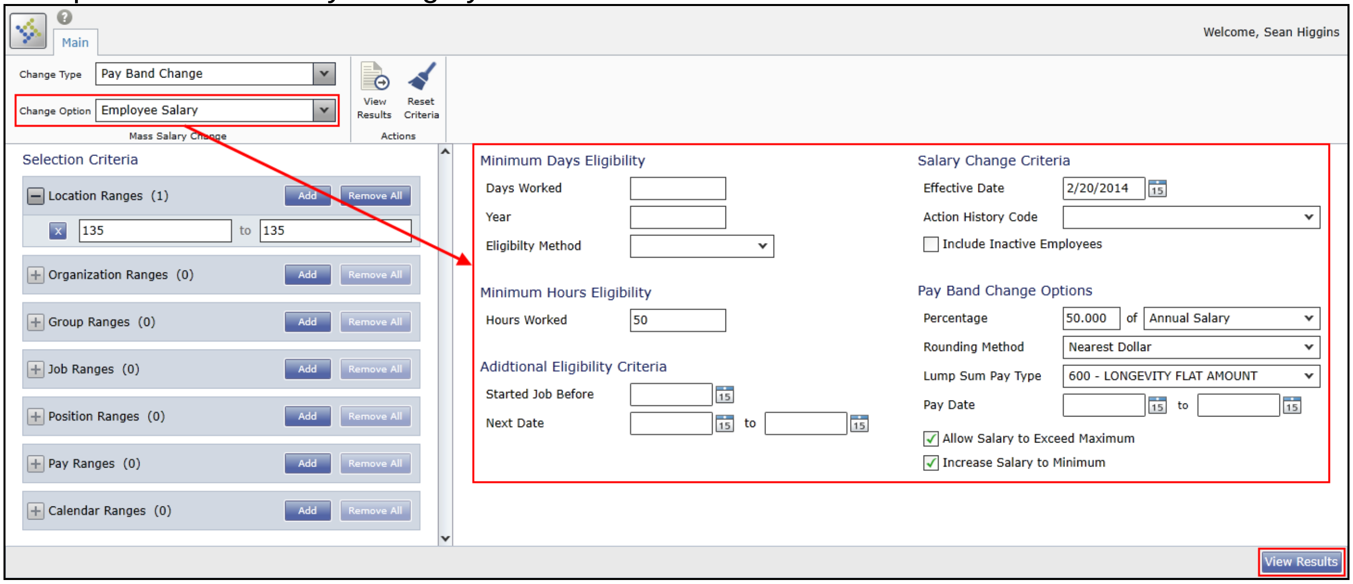
Use the options in the Selection Criteria pane to select the employees to include in the mass salary change. Create an active set of employees by defining ranges of different types, including location ranges, pay ranges, and calendar ranges.

Click Add next to any range type header and the program displays a new blank range of that type for you to complete.

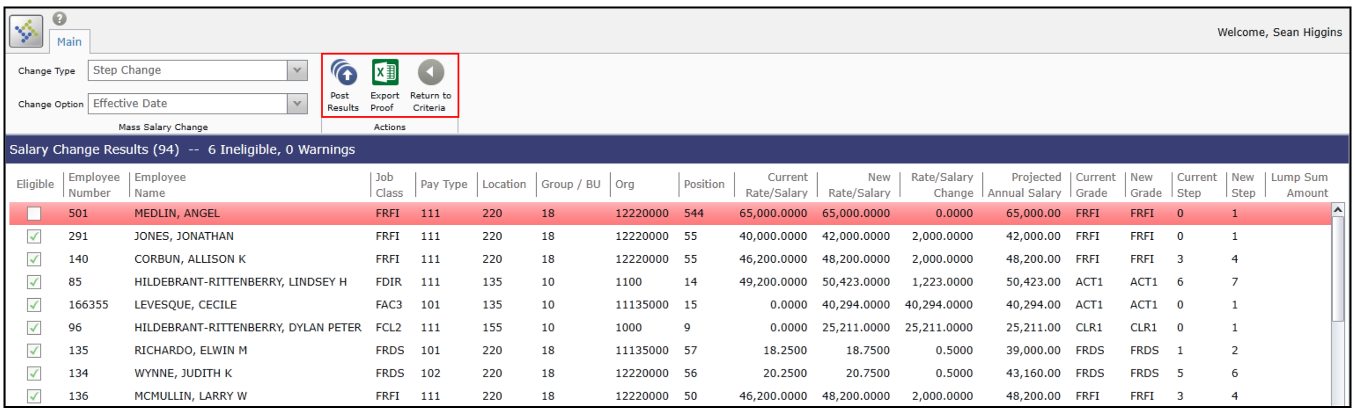
Use the Change Type list to select the type of mass salary change to make. You can select pay band change, step change, or contract change. Your choice determines the options that display in the Change Option list.



When you make a selection from the Change Option list, the fields in the primary pane refresh to accommodate your choice. The primary pane displays only the fields necessary to define the specific mass salary change you selected.



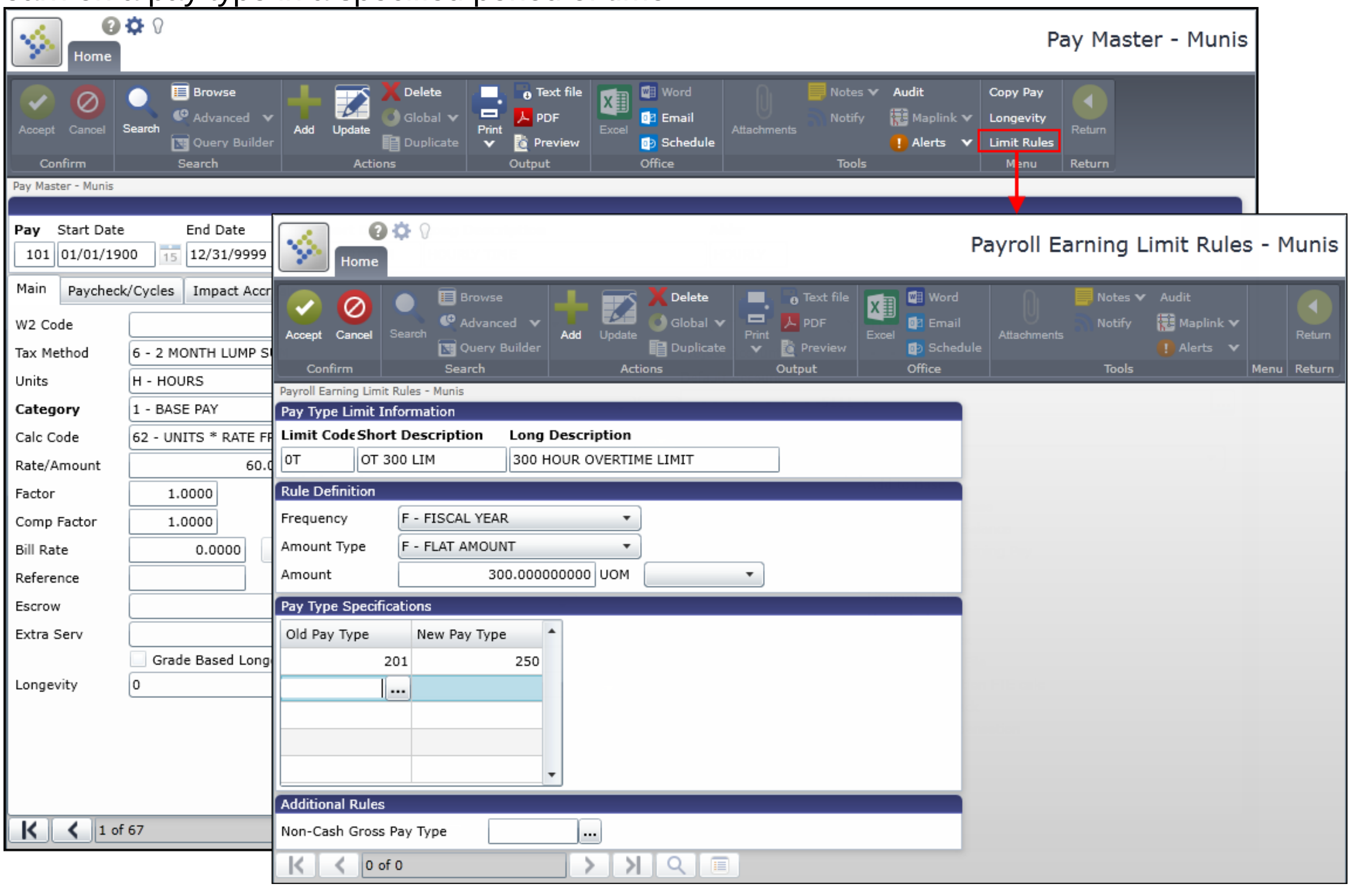
Once you have configured all necessary options, click View Results to display the proof screen.



Use the options in the Actions group to post the change, export the proof to Microsoft Excel, or return to the selection screen.

Pay Type Limit Rules

The Limit Rules option on the menu in Pay Master displays the Payroll Earning Limit Rules screen. This screen manages pay type limit rules, which control how much an employee can earn on a pay type in a specified period of time.



Use the Frequency list to set the limit period. For example, you can set a limit for every month, quarter, or fiscal year. The Amount Type list and Amount box are also available. Together, these fields define the limit amount. You can set a limit either when the employee has reached a specified accrual balance or when the employee has earned a specified percentage of their annual salary.

In the Old Pay Type box, indicate the pay type that the limit applies to. In the New Pay Type box, enter the pay type to use for employee earnings once they have reached the limit. All employee earnings after they have reached the limit are recorded this new pay type. Earnings revert to the old pay type when a new limit period begins.

For example, you can configure a limit so that:

- The first 300 hours of overtime that an employee earns in a fiscal year use a pay type that counts toward retirement benefits.
- Any hours the employee earns in a fiscal year after they have reached the limit use a pay type that does not count toward retirement benefits.

The limit is applied whether the employee receives earnings during payroll processing or you enter earnings for the employee manually. The effects are reflected in the employee's Payroll Earnings and Deductions records.

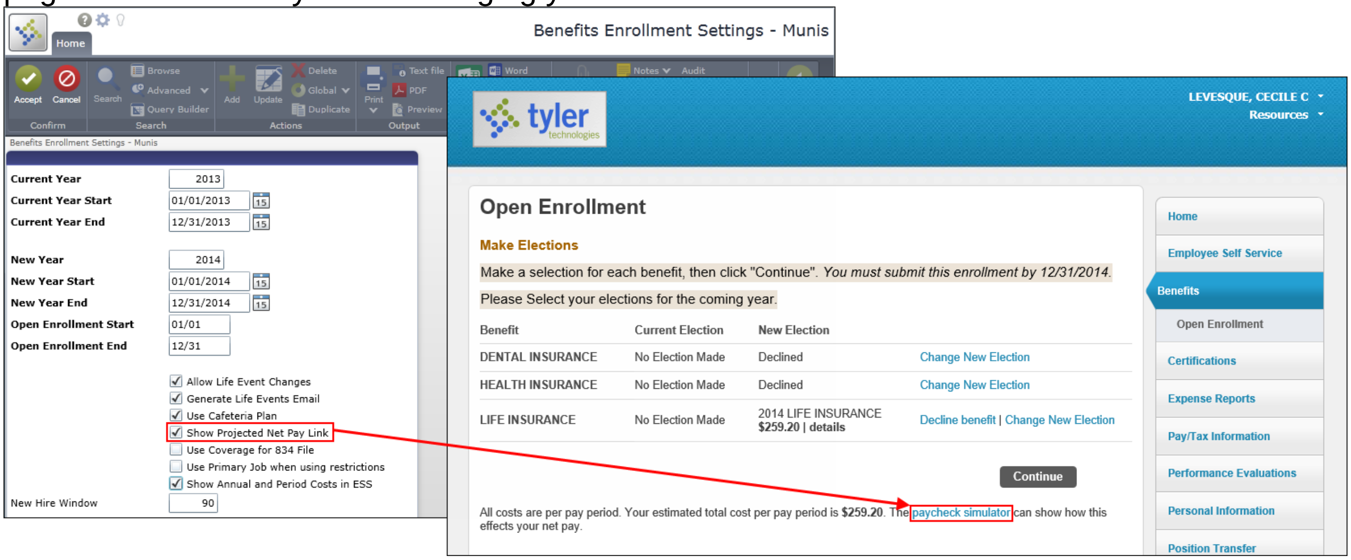
Payroll Control Settings

Category	Setting	Description
General	Reduce Accrual Earnings	This option, when enabled, configures the accruals process so that accruals do not create a lapse record in Employee Accrual History when they exceed their defined limit. Instead, these accruals limited to the defined maximum.

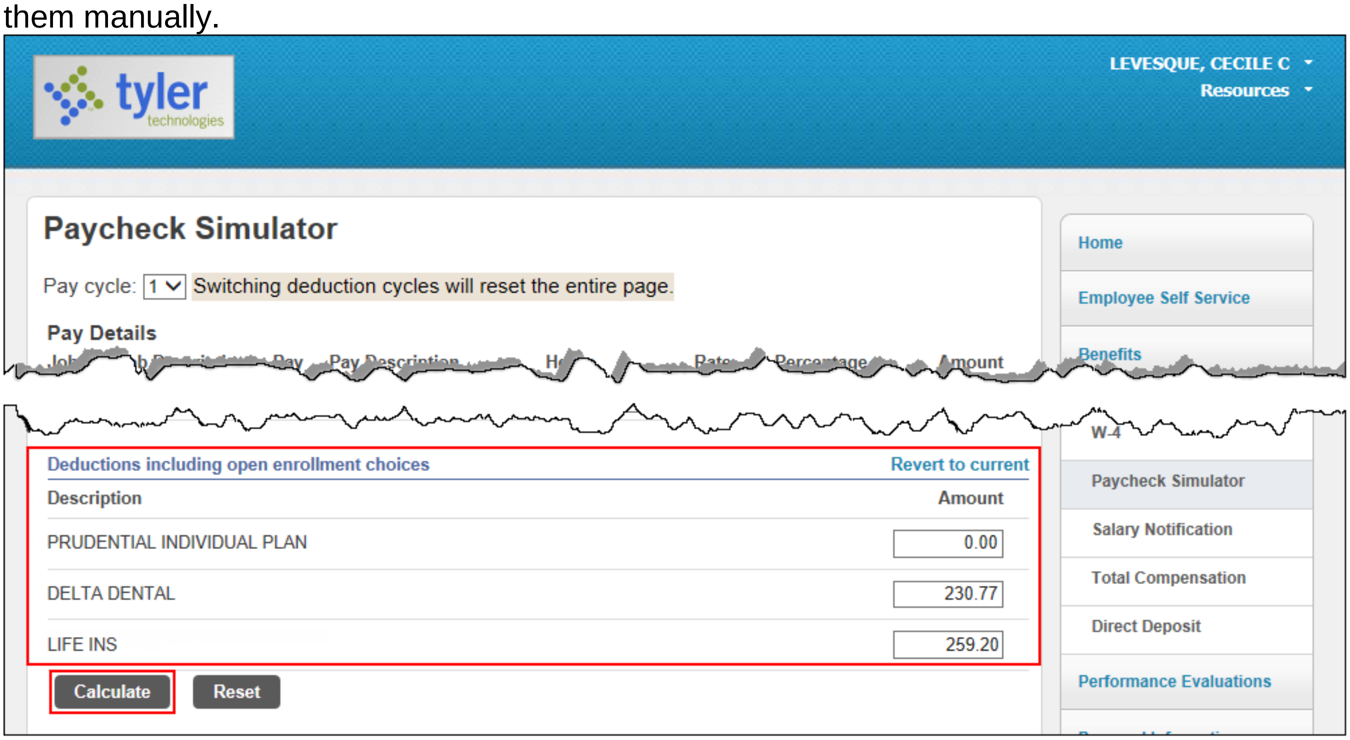
Employee Self Service

Benefits Enrollment Paycheck Simulator

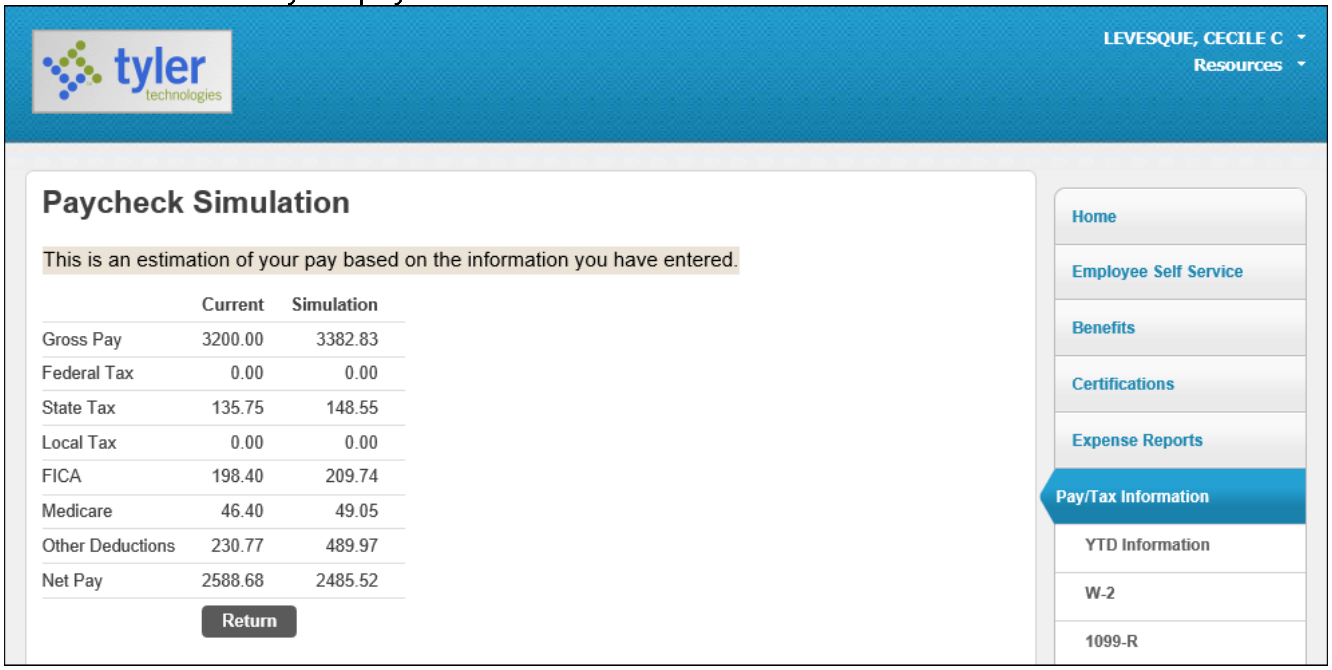
The Benefits Enrollment Settings program includes the Show Projected New Pay Link check box. When you select this check box, ESS displays the Paycheck Simulator link on applicable pages in ESS when you are changing your benefit selections.



Click the Paycheck Simulator link to open the paycheck simulator page. ESS automatically carries over the amounts from your new selections to this page so you do not have to enter them manually.



Click Calculate and ESS displays the paycheck simulation page, which shows the effect of those selections on your paycheck.

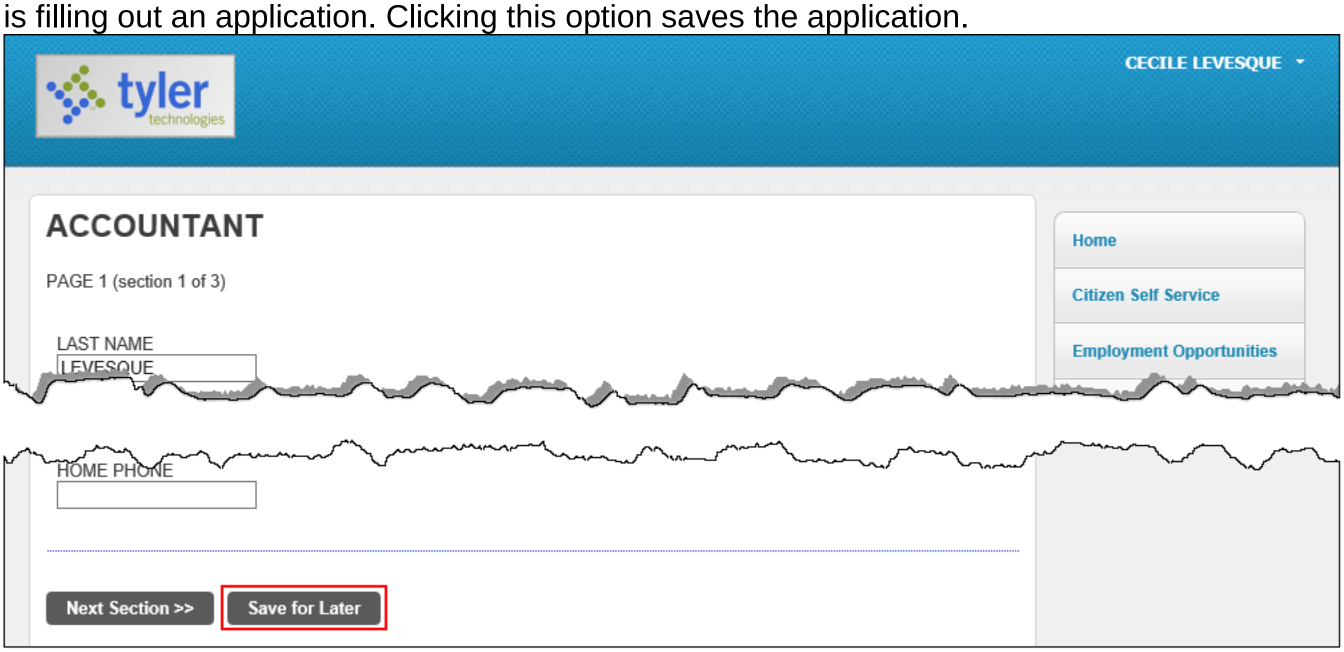


This function enables you to test the effects of different benefit selections on your paycheck and choose the best combination.

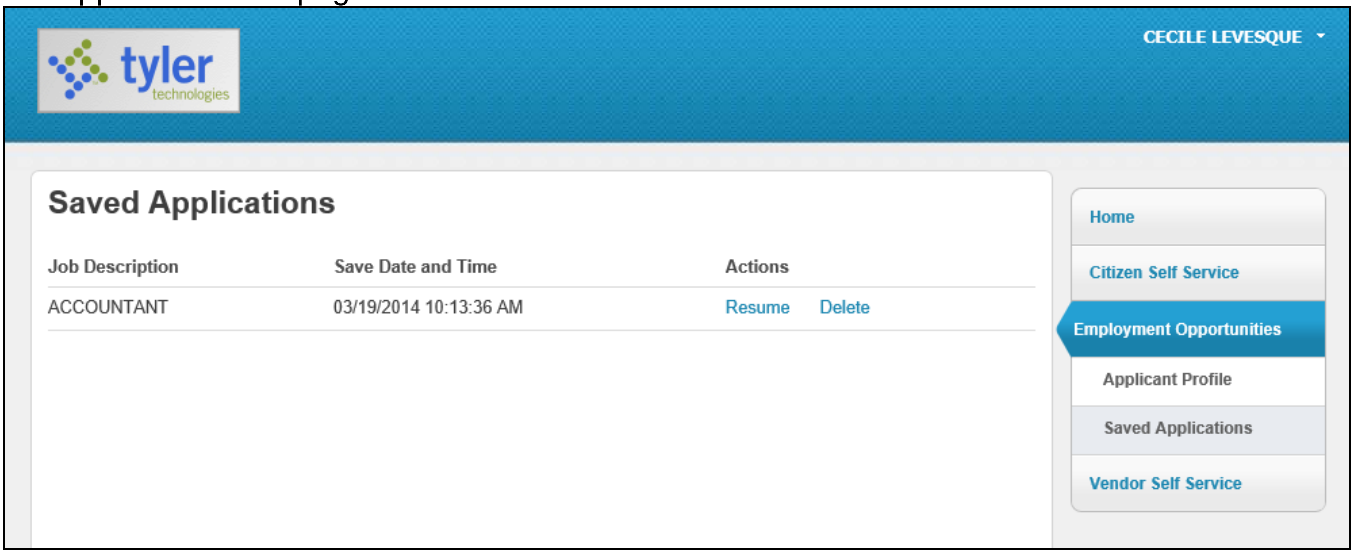
Employment Opportunities

Incomplete Job Applications

Munis Self Service allows applicants to save incomplete applications and return to finish them at a later time. Self service displays the Save for Later option on every page when an applicant is filling out an application. Clicking this option saves the application.

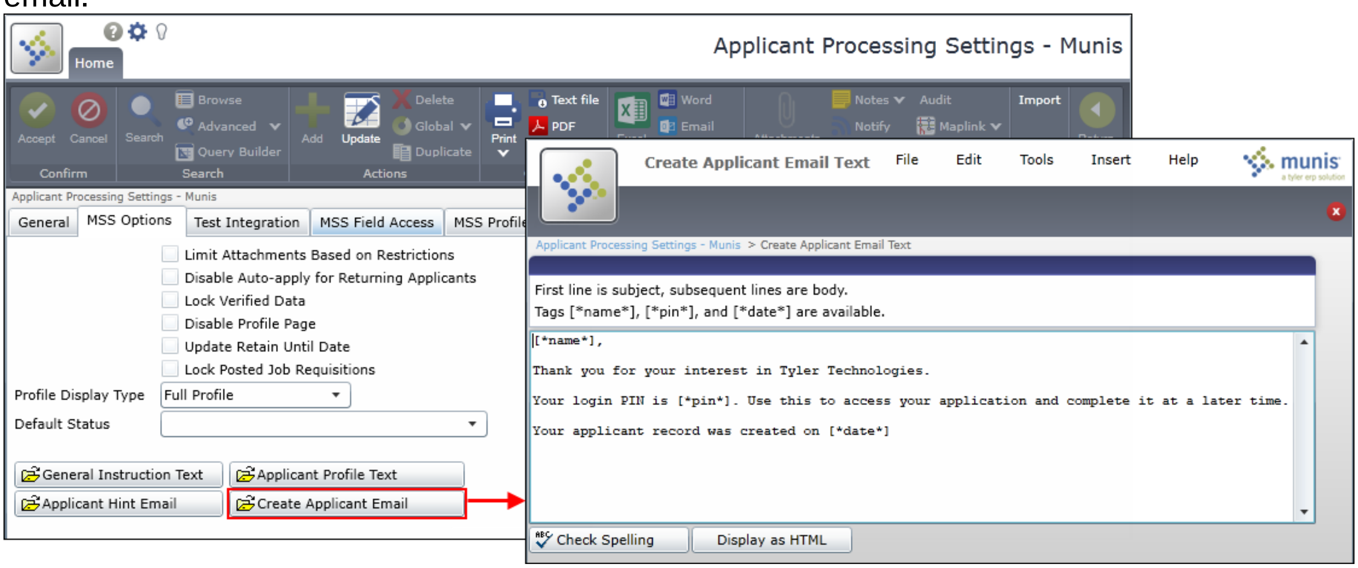


Applicants can access incomplete applications by logging in to their self service accounts and clicking Saved Applications in the Employment Opportunities group on the menu. This page lists each incomplete application, including the date and time it was saved and options for resuming or deleting it. This information is also included in the Saved Applications group on the Applicant Profile page.

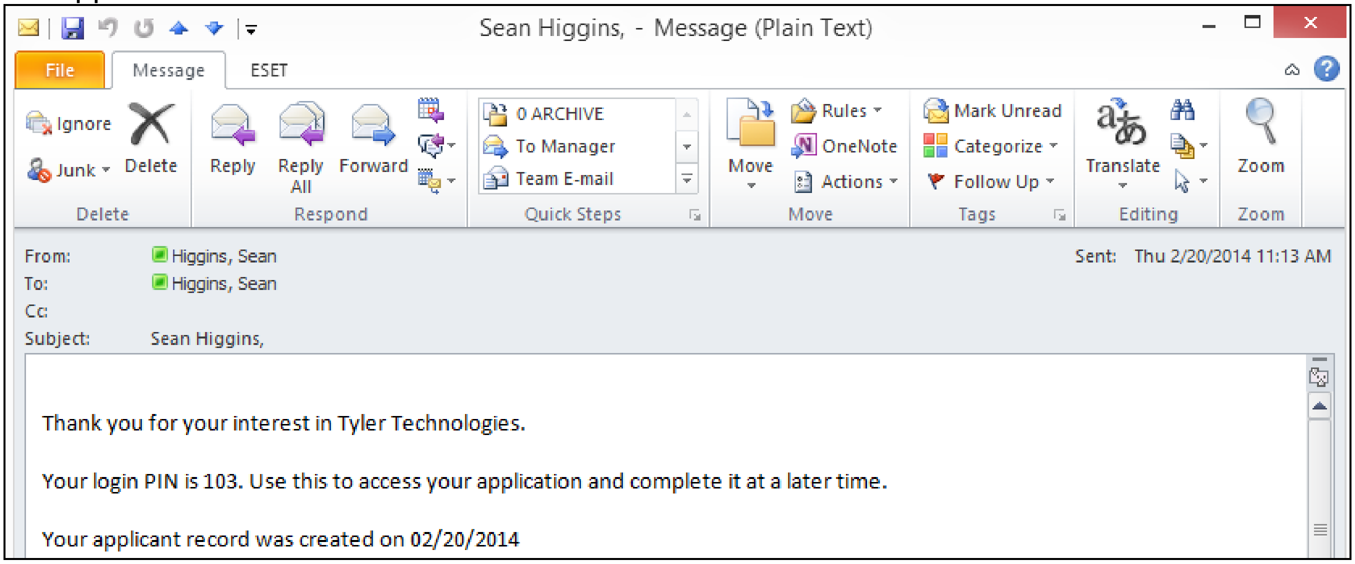


The Applicant Processing Settings program includes functionality for emailing a personal identification number (PIN) to all applicants who create an account on self service, even if they do not complete an application. They can use this PIN to access their account and complete unfinished applications.

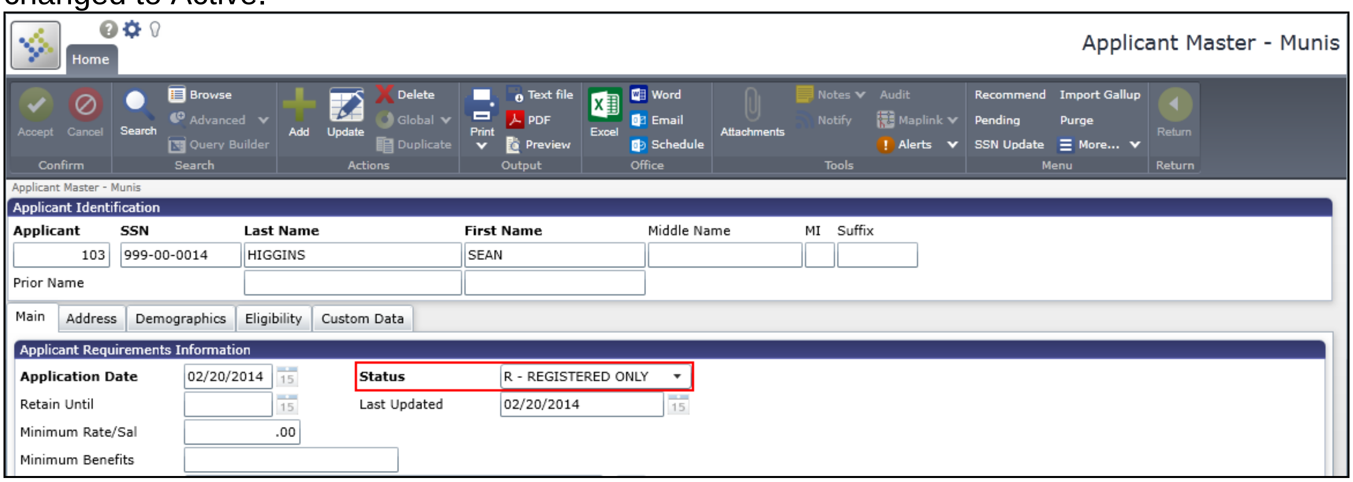
The Create Applicant Email option on the MSS Options tab opens the Create Applicant Email Text screen, where you can specify the text of the PIN email.



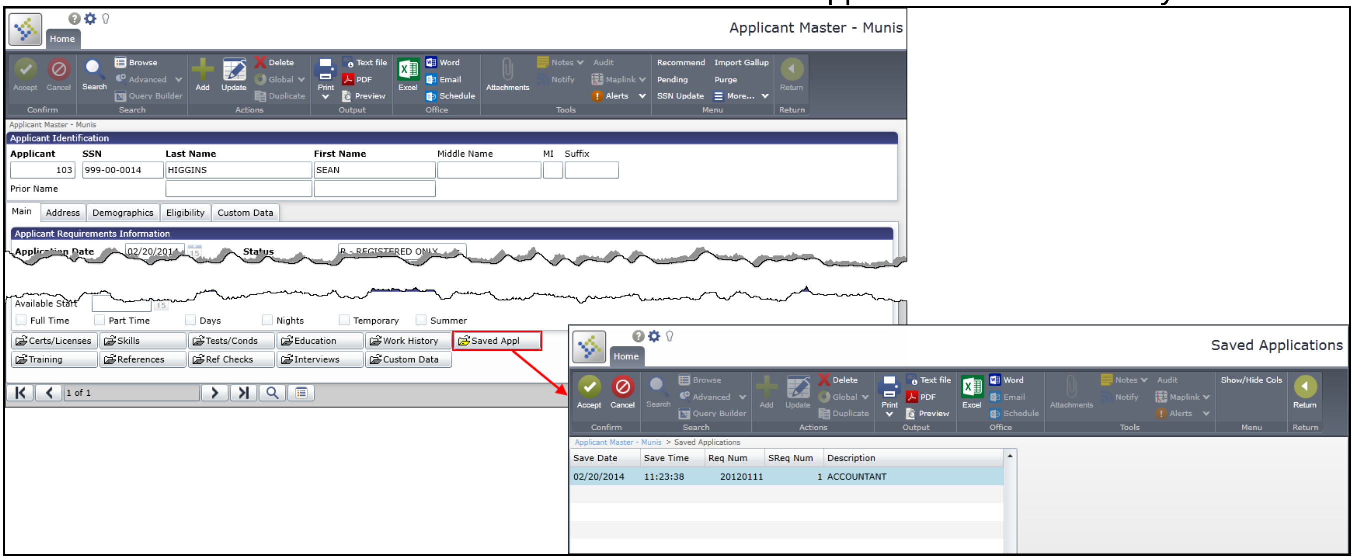
If you do not define an applicant email, the program uses a default format configured to supply the applicant's PIN.



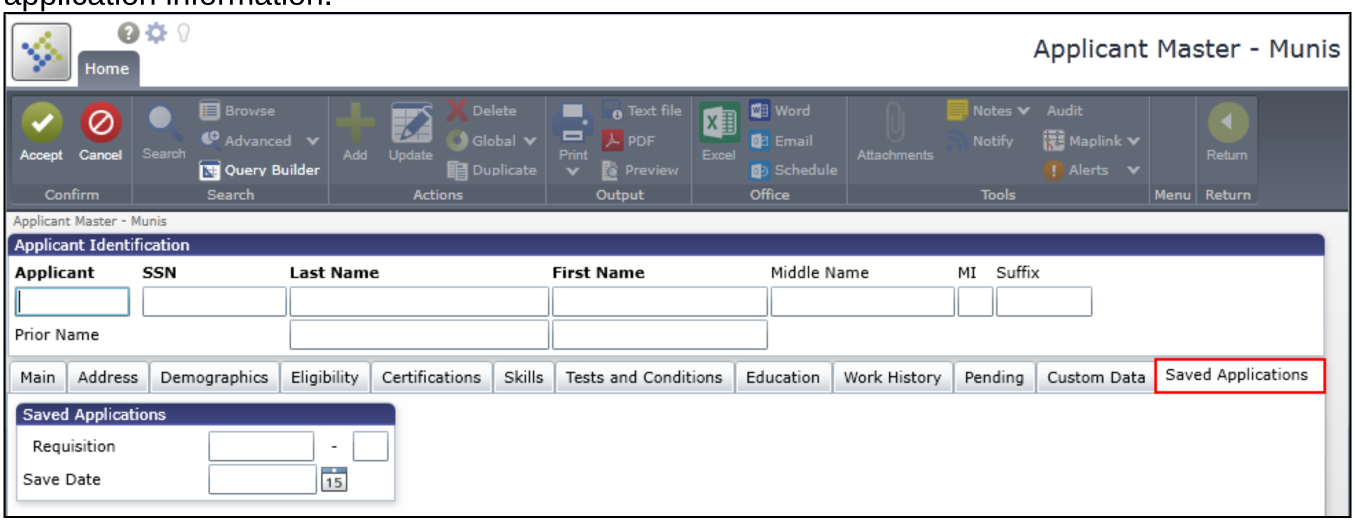
Applicant Master tracks the completion of applications. If an applicant has only logged into his or her account but not completed any applications, the status on the record is set to R - Registered Only. When the applicant has completed at least one application, the status is changed to Active.



If you have personnel superuser permissions, use the Saved Appl button in Applicant Master to display the Saved Applications screen. This screen lists all incomplete applications saved by the applicant as well as details about those applications, including the date and time when it was saved. Use the Delete button on the menu to delete applications as necessary.



When you perform a search in Applicant Master, the Saved Applications tab is available. Complete the Requisition and Save Date fields to search for an applicant using their saved application information.

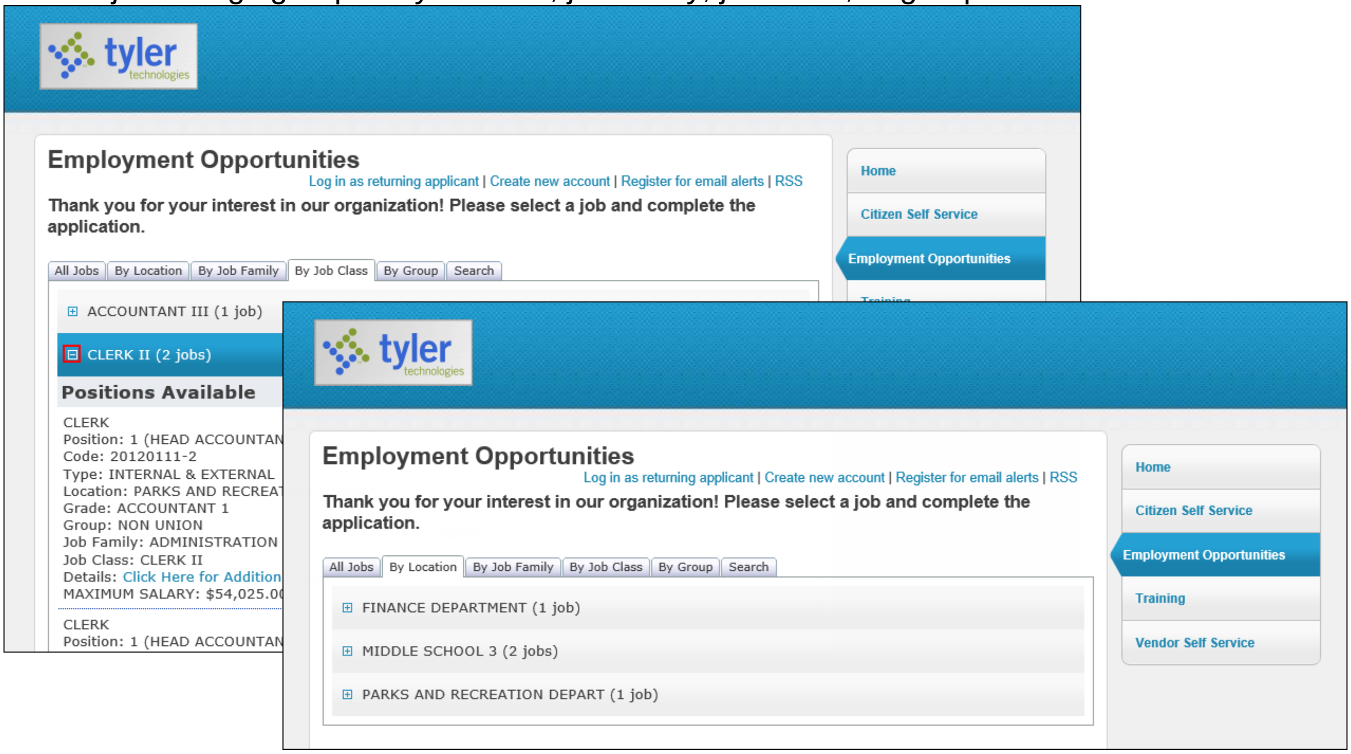


If you delete an applicant record, any associated saved applications are deleted as well. If you merge two applicant records, all applications saved on those records are merged.

Employment Opportunities Page

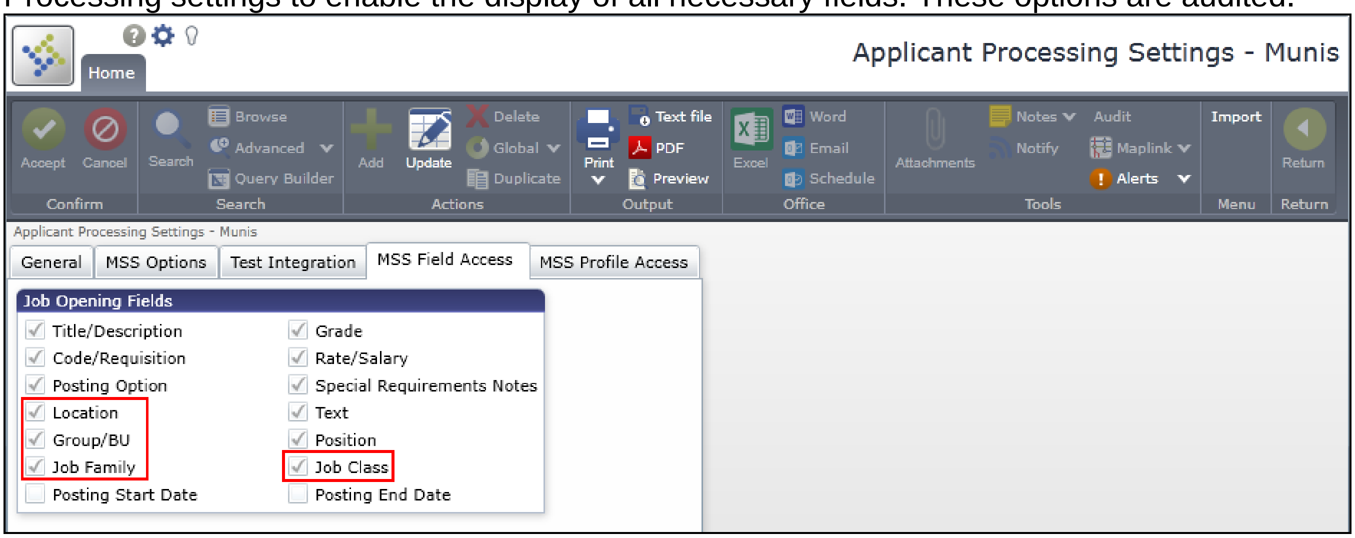
Munis Self Service and associated Munis programs provide greater control over how the Employment Opportunities page displays job openings to applicants.

The page provides tabs that group available jobs by different criteria. Select one of these tabs to view job listings grouped by location, job family, job class, or group.

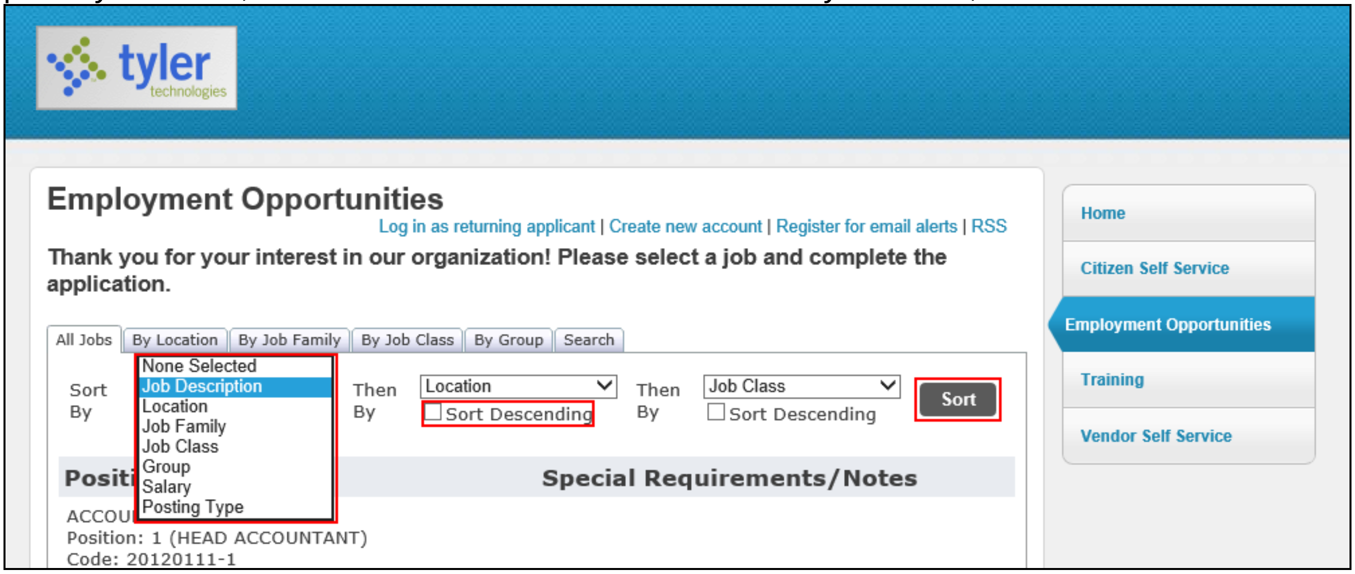


Each tab provides subgroups that further organize the job listings. For example, on the By Location tab, self service displays a header for each location that has job openings. Each header shows the number of openings for that location. Click the more (+) button on a header to expand that list of jobs.

To enable these tabs, you must configure the pertinent fields to display in self service as part of the job opening listing. Use the check boxes on the MSS Field Access tab in Applicant Processing settings to enable the display of all necessary fields. These options are audited.

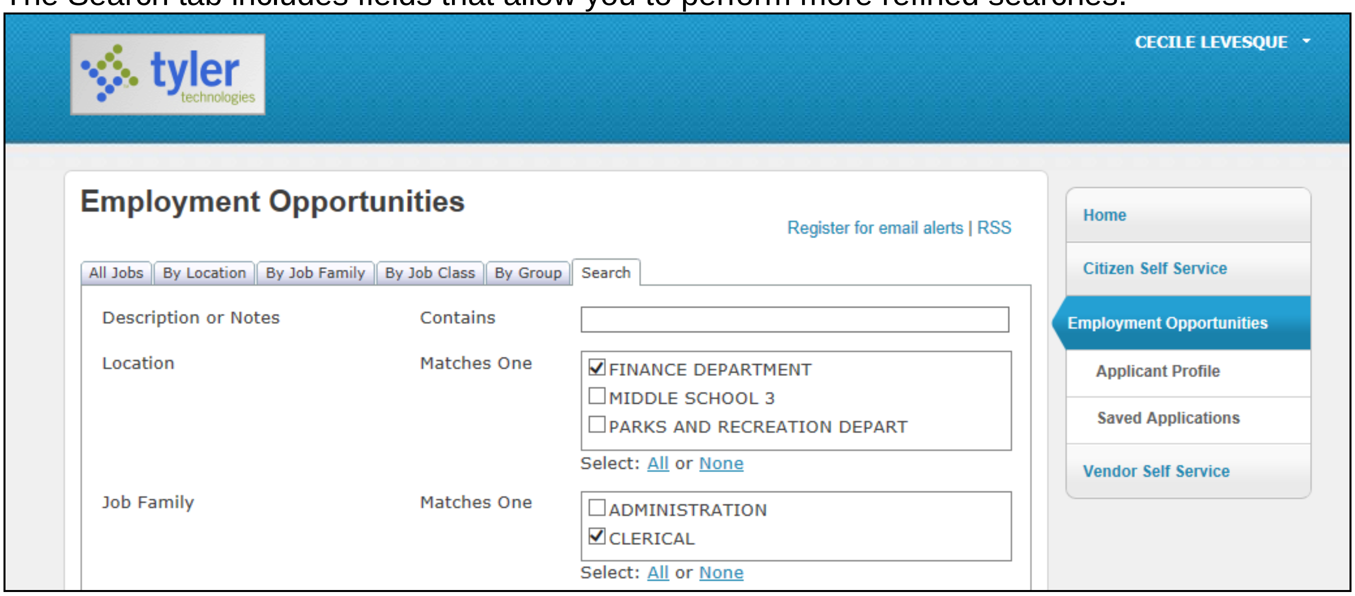


The All Jobs tab on the Employment Opportunities page provides three Sort By lists. Select the names of fields from these lists to sort the available positions. The first list determines the primary sort field, the second list determines the secondary sort field, and so on.

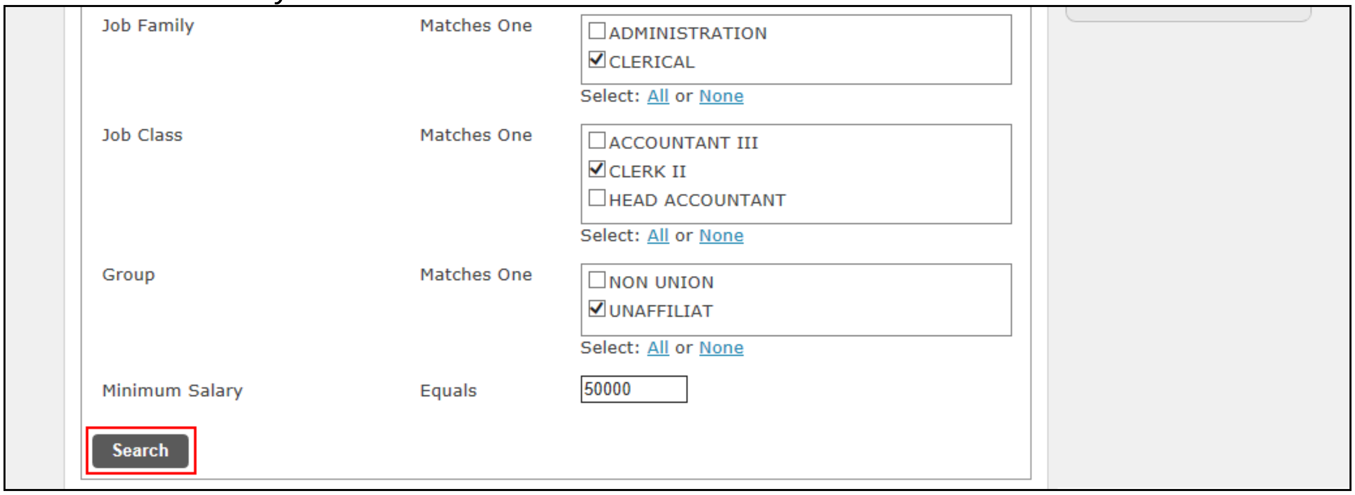


Click the Sort Descending check box under any of these lists to sort by the specified field in descending order rather than ascending order. Once you have configured your sort criteria, click Sort to sort the list.

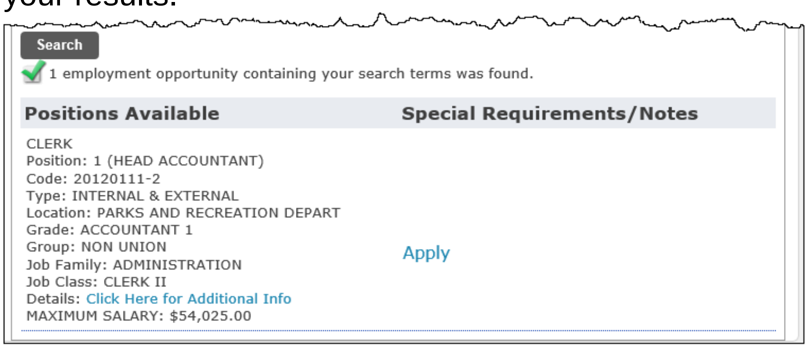
The Search tab includes fields that allow you to perform more refined searches.



You can search for job listings by specifying criteria including description, location, job class, and minimum salary.

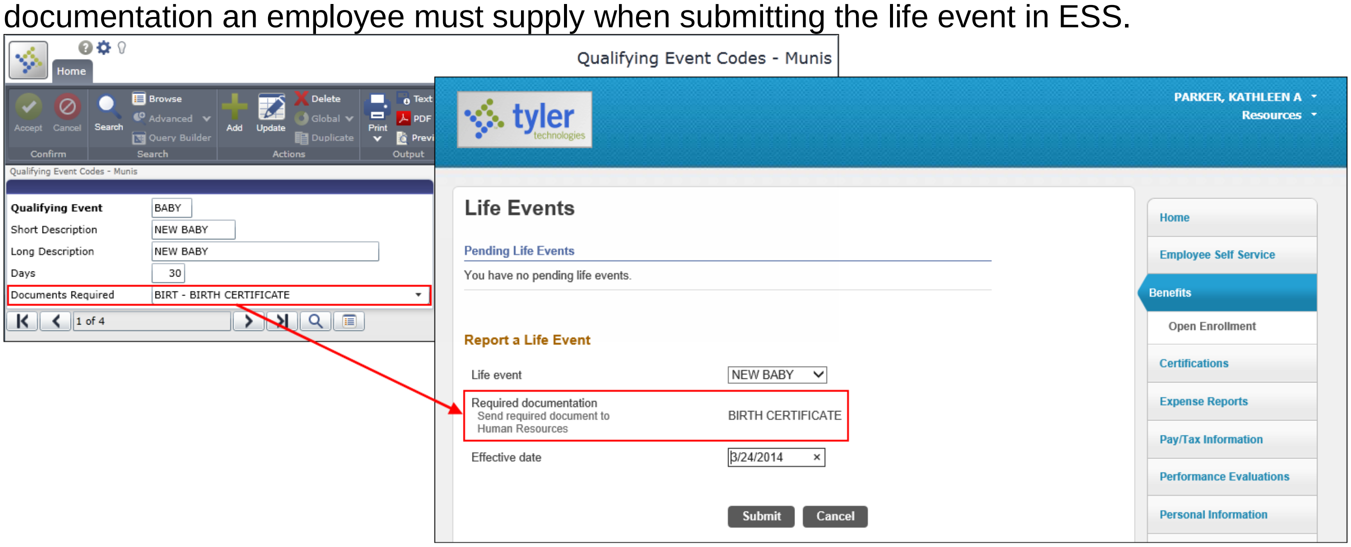


Select the check boxes and complete the boxes to define your search. Click Search to view your results.



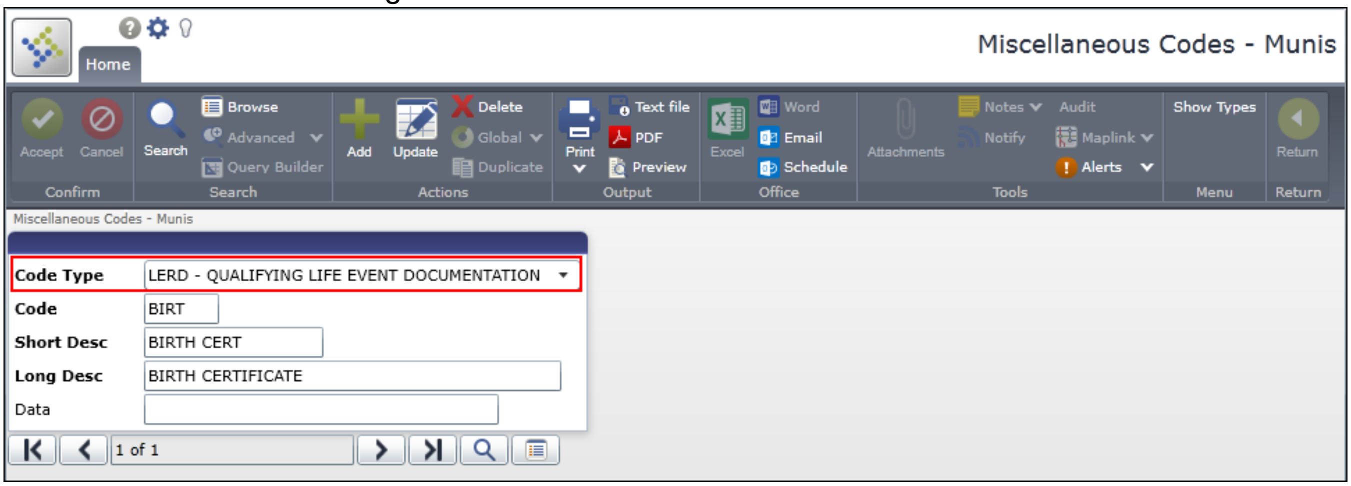
Life Event Documentation

The Documents Required list in the Qualifying Event Codes program specifies the type of documentation an employee must supply when submitting the life event in ESS.

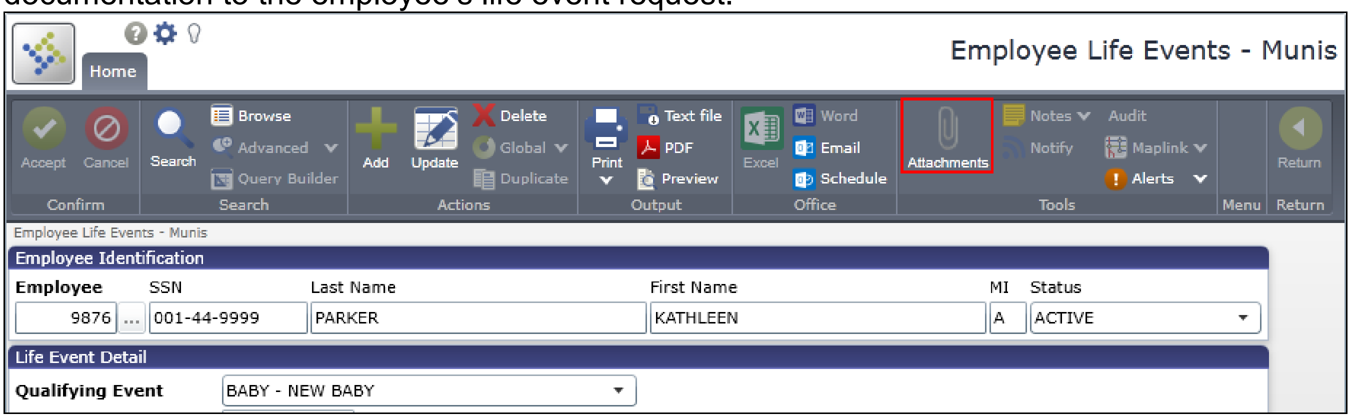


When an employee submits that life event, the ESS confirmation page displays the documentation requirement.

Define codes for required documents using the LERD – Qualifying Life Event Documentation code type in Payroll Miscellaneous Codes. The information that displays to the employee in ESS is drawn from the Long Desc field.

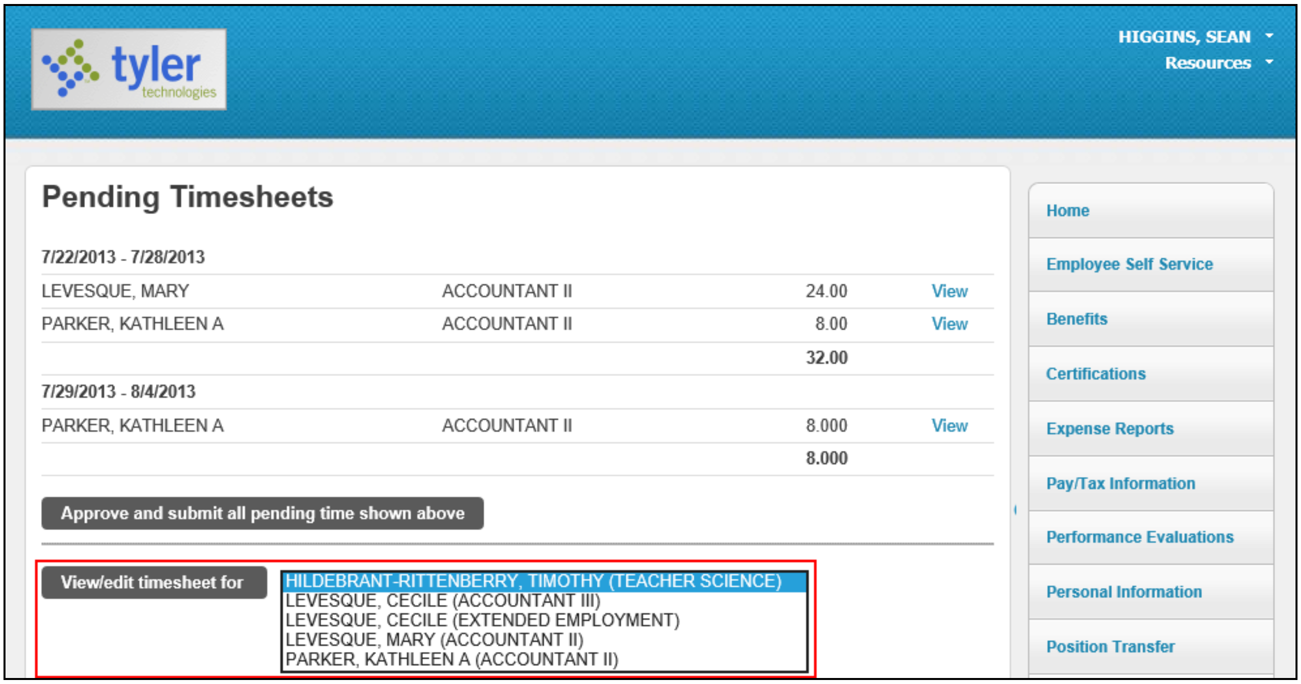


Use the Attachments function in the Employee Life Events program to attach the documentation to the employee's life event request.

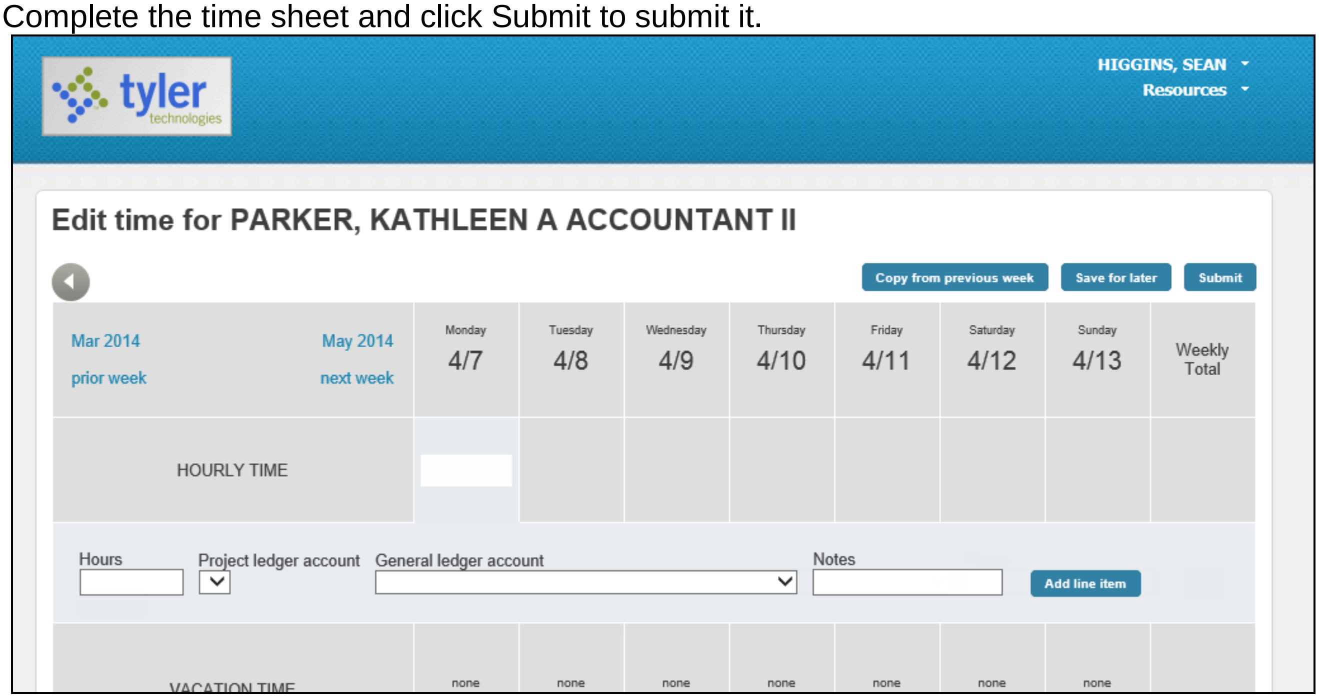


Time Entry

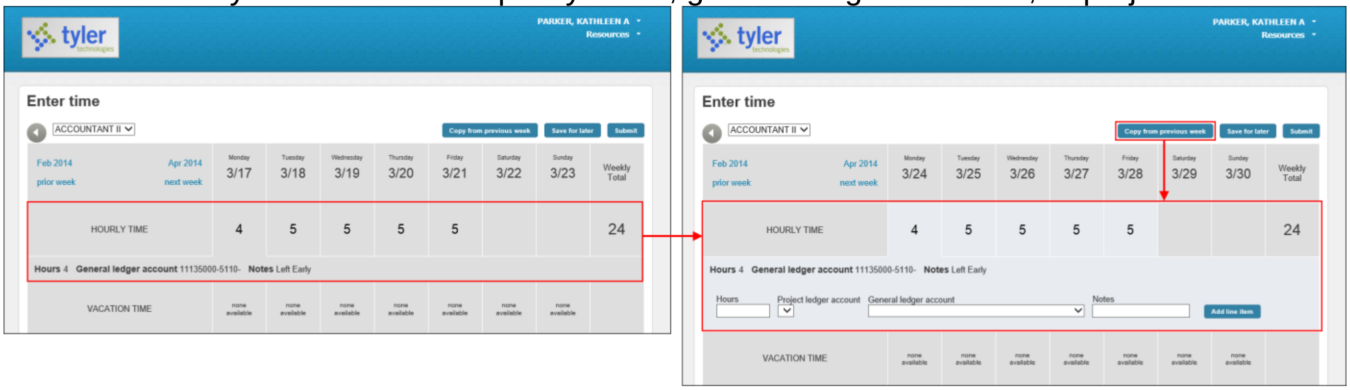
If you are a supervisor, the View/Edit Timesheet For option is available on the Pending Timesheets page in ESS Time Entry. This option allows you to add a new time sheet for one of your subordinates, for example, when he or she cannot submit a time sheet due to an unforeseen absence.



Use the list to select the employee you are entering a time sheet for. If the employee has more than one job class, select the option that includes the appropriate job class. Click the View/Edit Timesheet For button and ESS displays that employee's time sheet for the current week. Complete the time sheet and click Submit to submit it.



The Copy From Previous Week button is available on the Enter Time page in ESS Time Entry. Click this button to copy the time sheet entered for the previous week. The function copies any line entries that you have used to specify notes, general ledger accounts, or project accounts.



If your time sheet is complex, but changes minimally from week to week, this function enables you to complete your time entry more efficiently and with fewer errors. It copies only entries for worked time; it does not copy accrual requests.

The First Day of Time Sheet Week list is available in the Time Sheet section on the Application Settings page in Employee Self Service Administration. This list defines the first day that displays on the time sheet in ESS Time Entry.