Munis Human Resources and Payroll

Major Enhancements
Version 10.4 to 10.5

For more information, visit www.tylertech.com.

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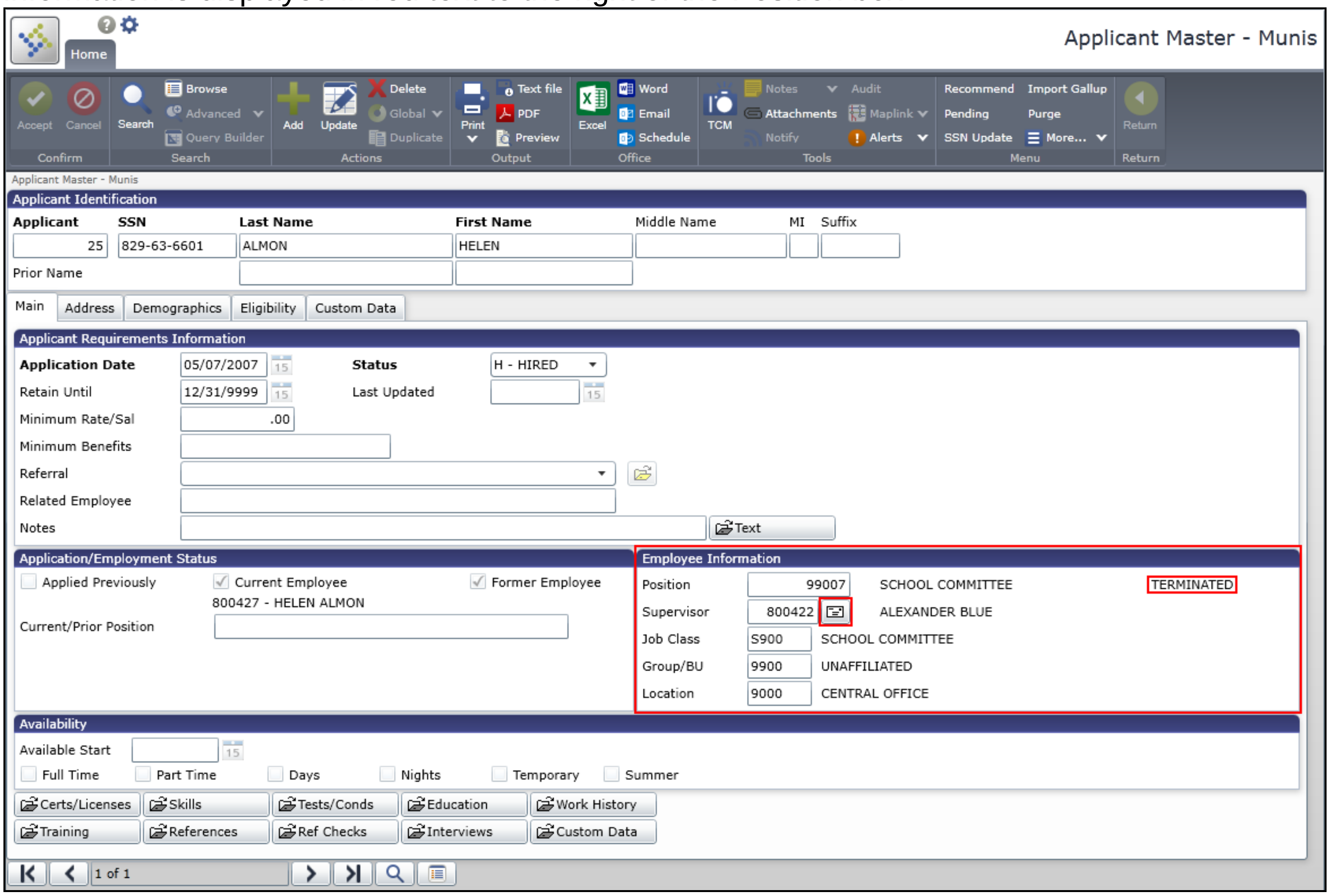
Human Resources for Version 10.4

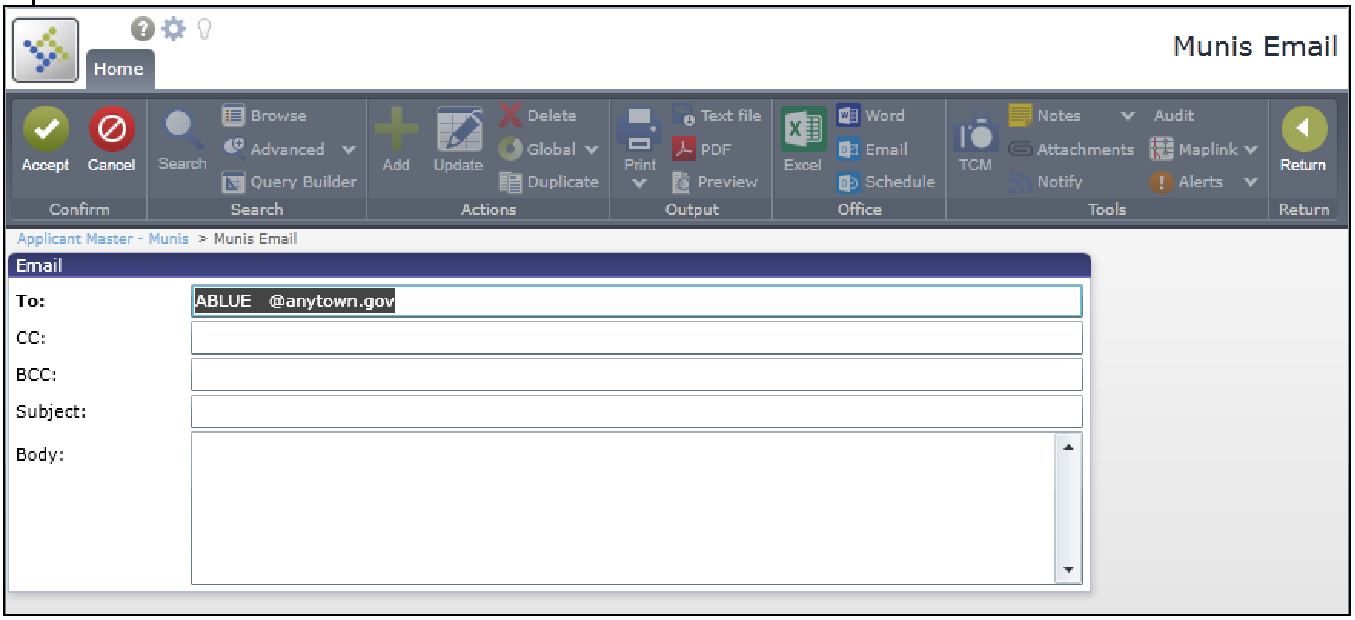
The following changes apply to Munis Human Resources programs.

Applicant Master

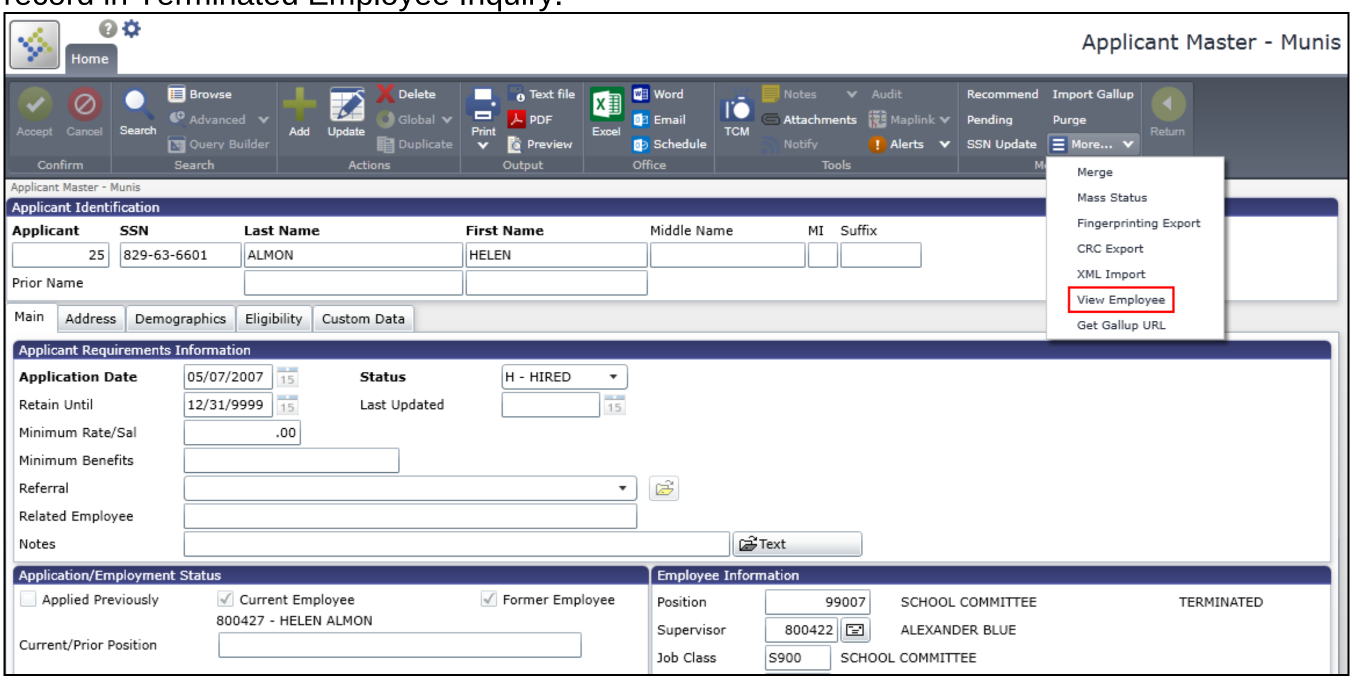
The Employee Information group on the Main tab in Applicant Master provides information regarding the applicant's current or previous position with your organization, if one exists. If you have the proper permissions, the group displays information including the position's number, supervisor, and location. 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.



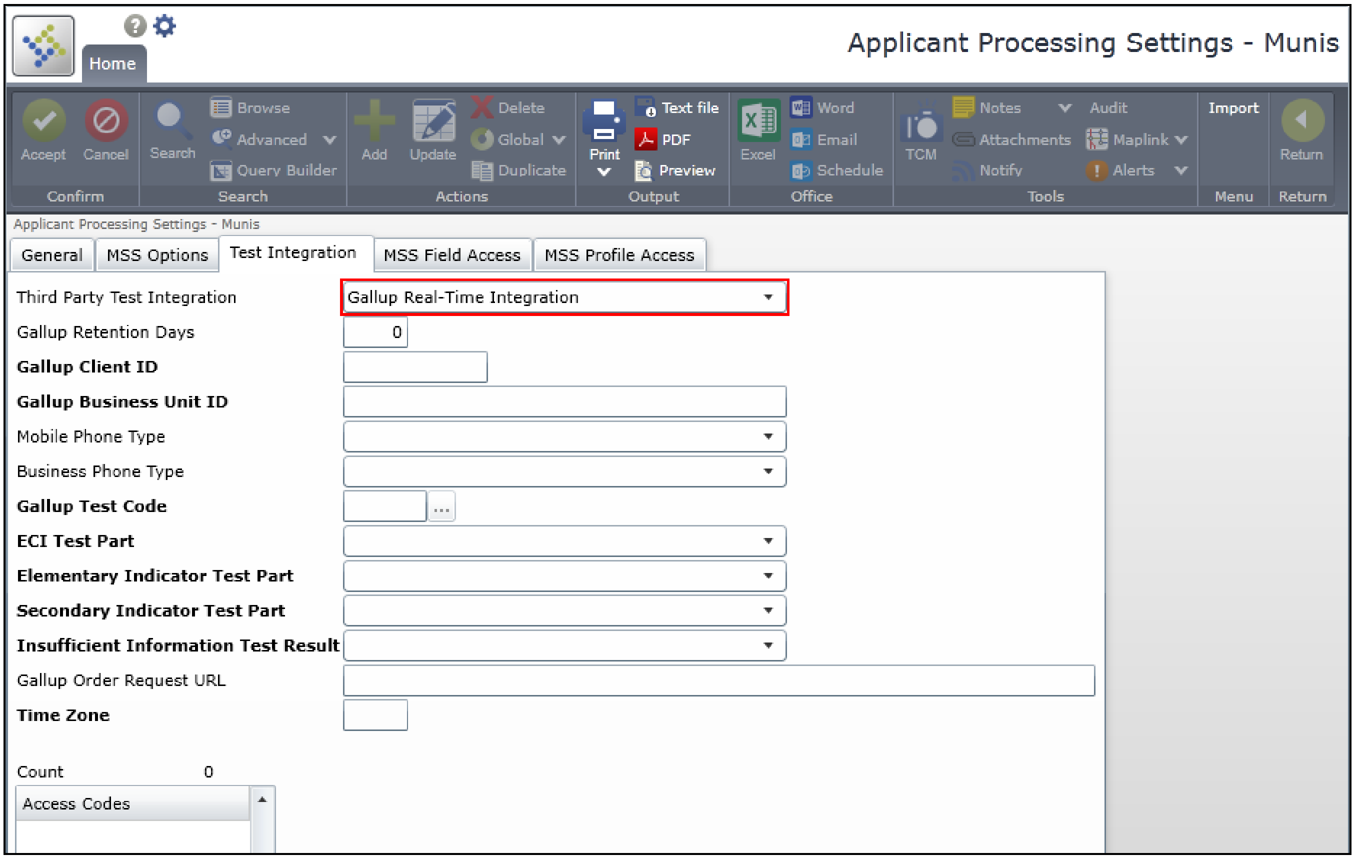
If you have the necessary permissions, click View Employee to display the active applicant's record in Employee Inquiry. If the applicant was terminated, this button displays his or her record in Terminated Employee Inquiry.



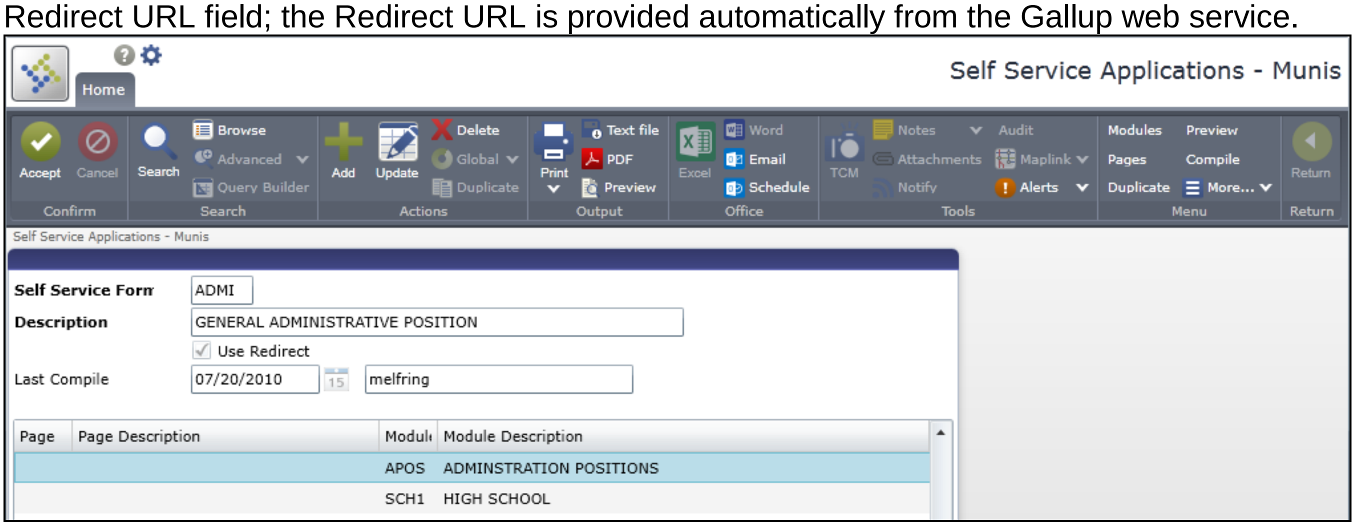
Applicant Processing

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

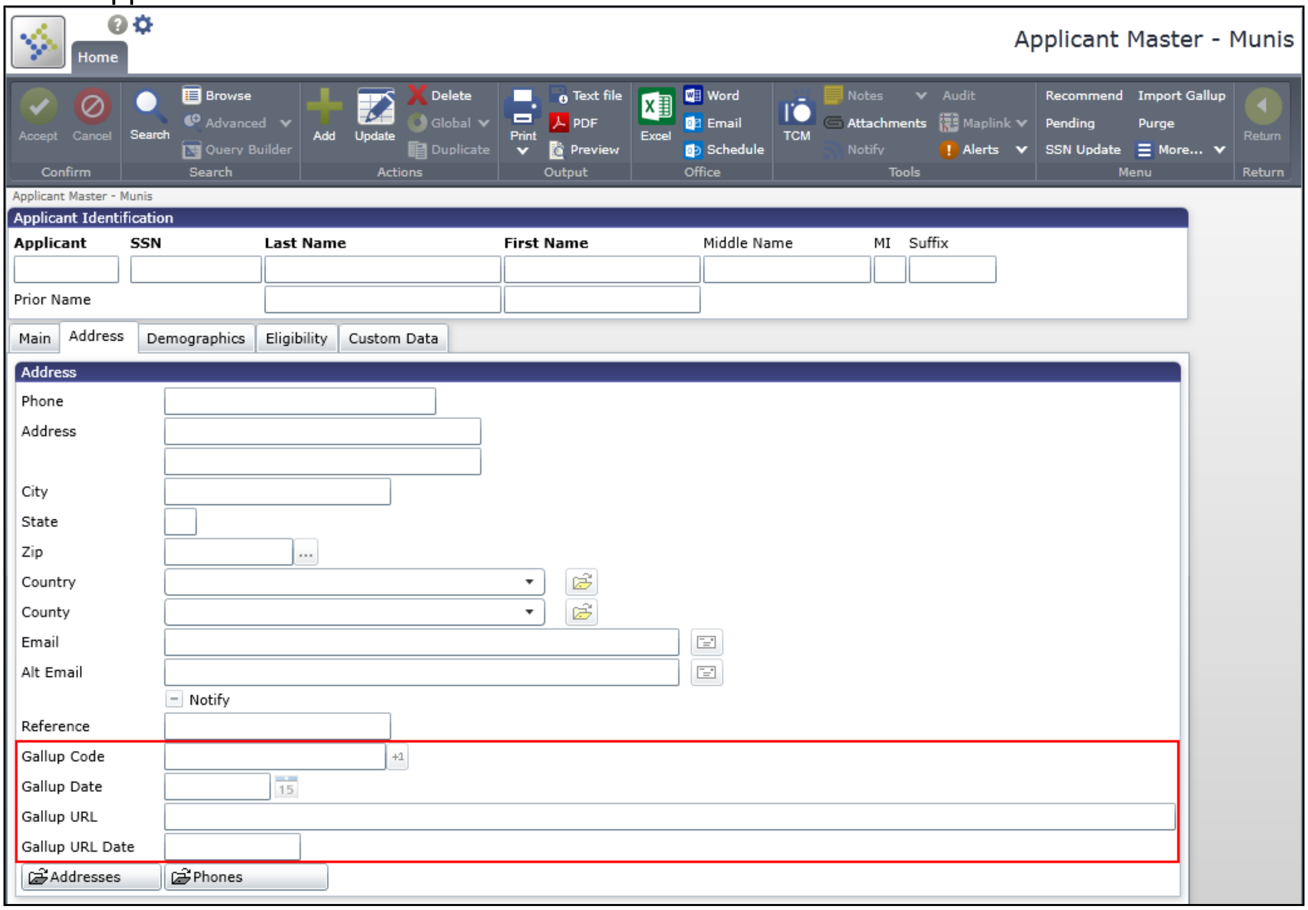
In Applicant Processing Settings, the Gallup Folder tab has been renamed Test Integration. When you select Gallup Real-Time Integration from the Third Party Test Integration list, the program displays options for configuring an automated process that imports Gallup data into Munis in real time.



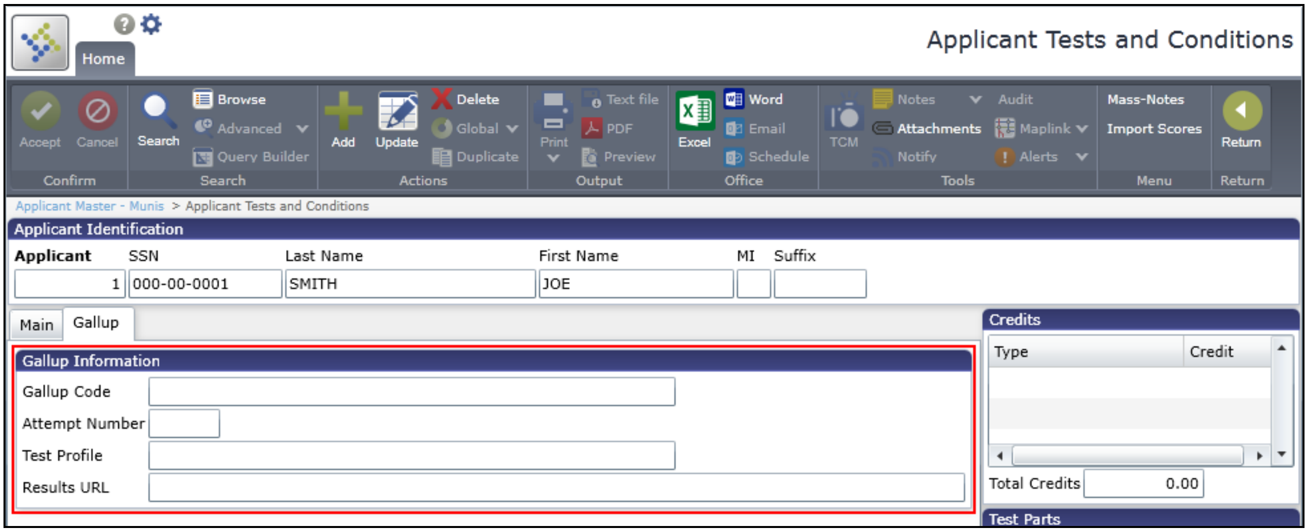
When you set up Gallup real-time integration, the Self Service Applications program automatically selects the Use Redirect box, which configures the system to redirect applicants to a Gallup interview URL after completing their applications. The program does not display the Redirect URL field; the Redirect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

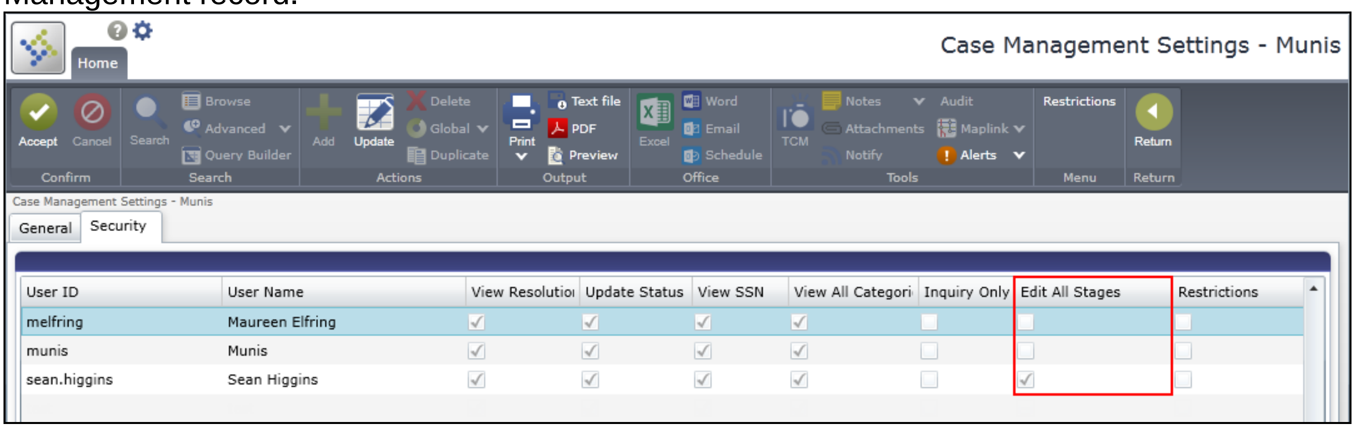


On the Applicant Tests and Conditions screen in Applicant Master, the Gallup tab displays information regarding the applicant's test, including the Gallup code and a URL for viewing detailed results.

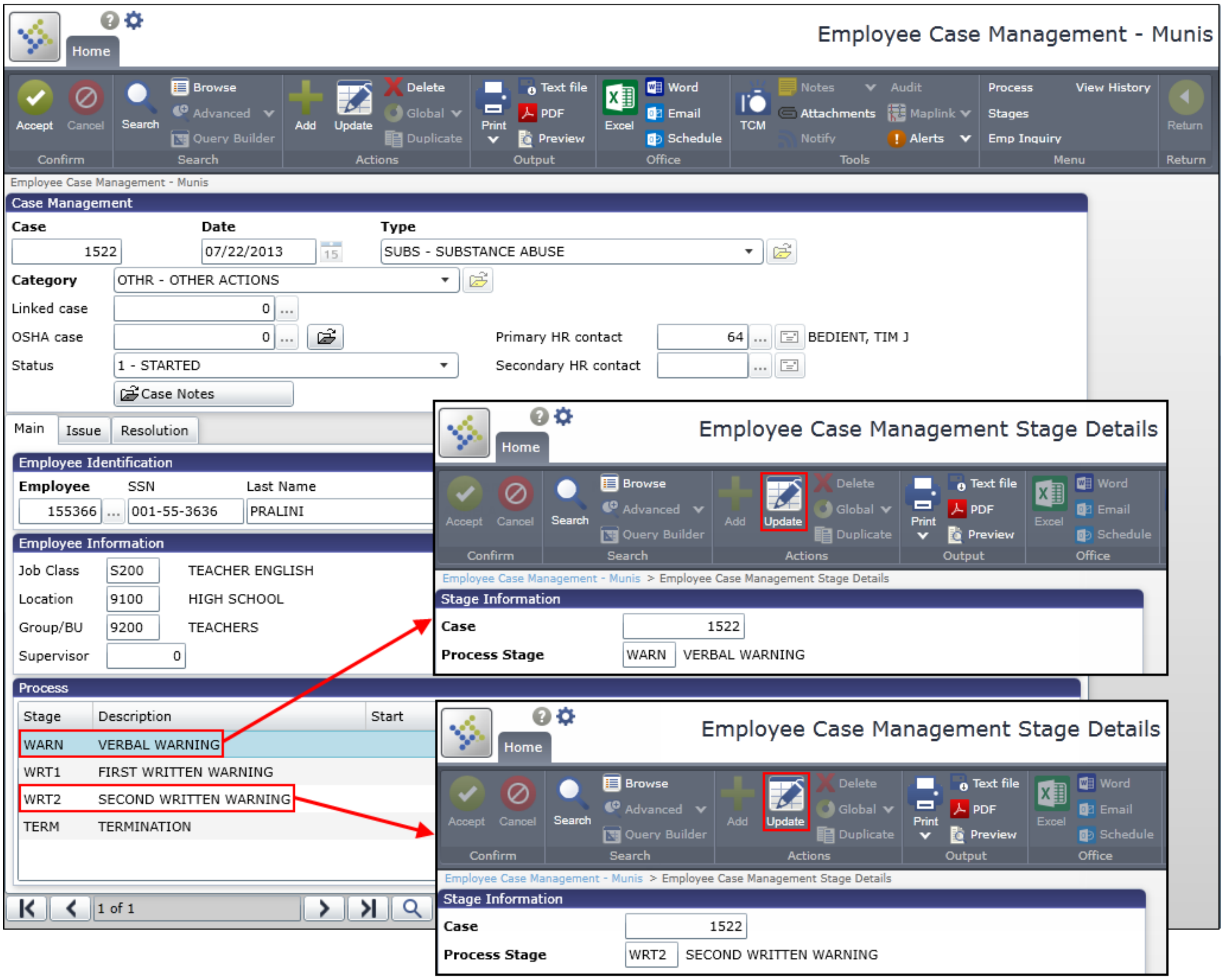


Case Management Settings

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.



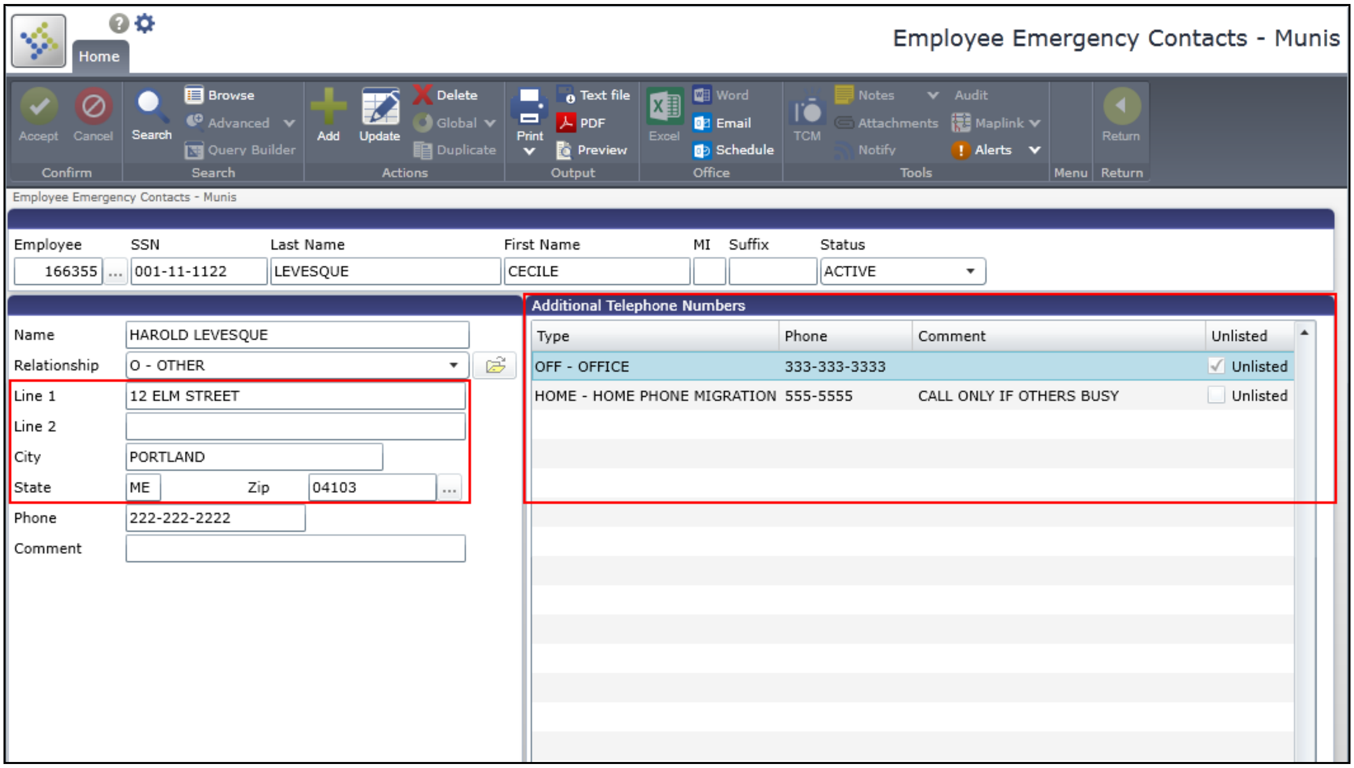
If you have been granted this permission, you can update any stage of a case in the Case Management program at any point in the process.



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

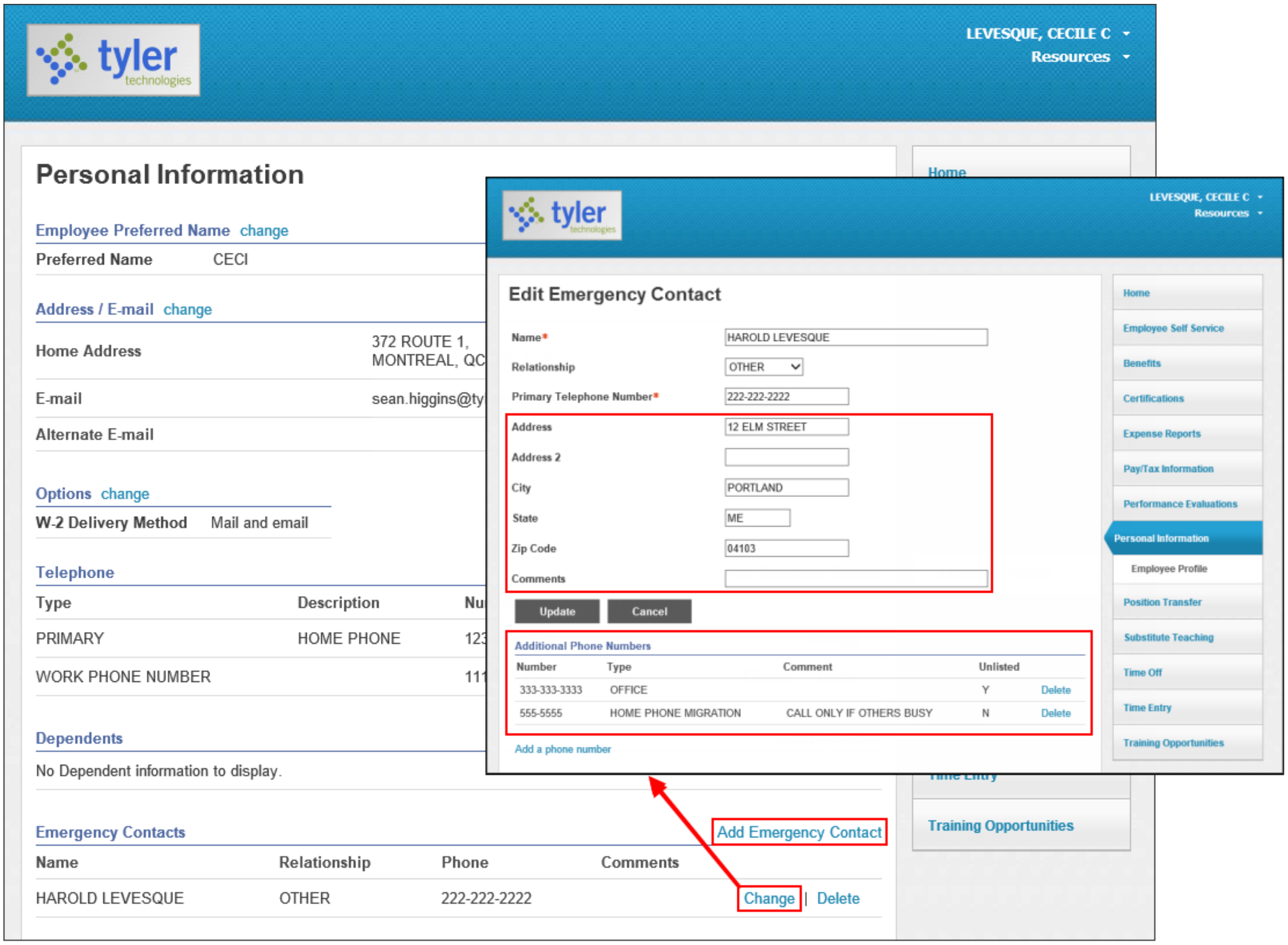
Employee Emergency Contacts

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.

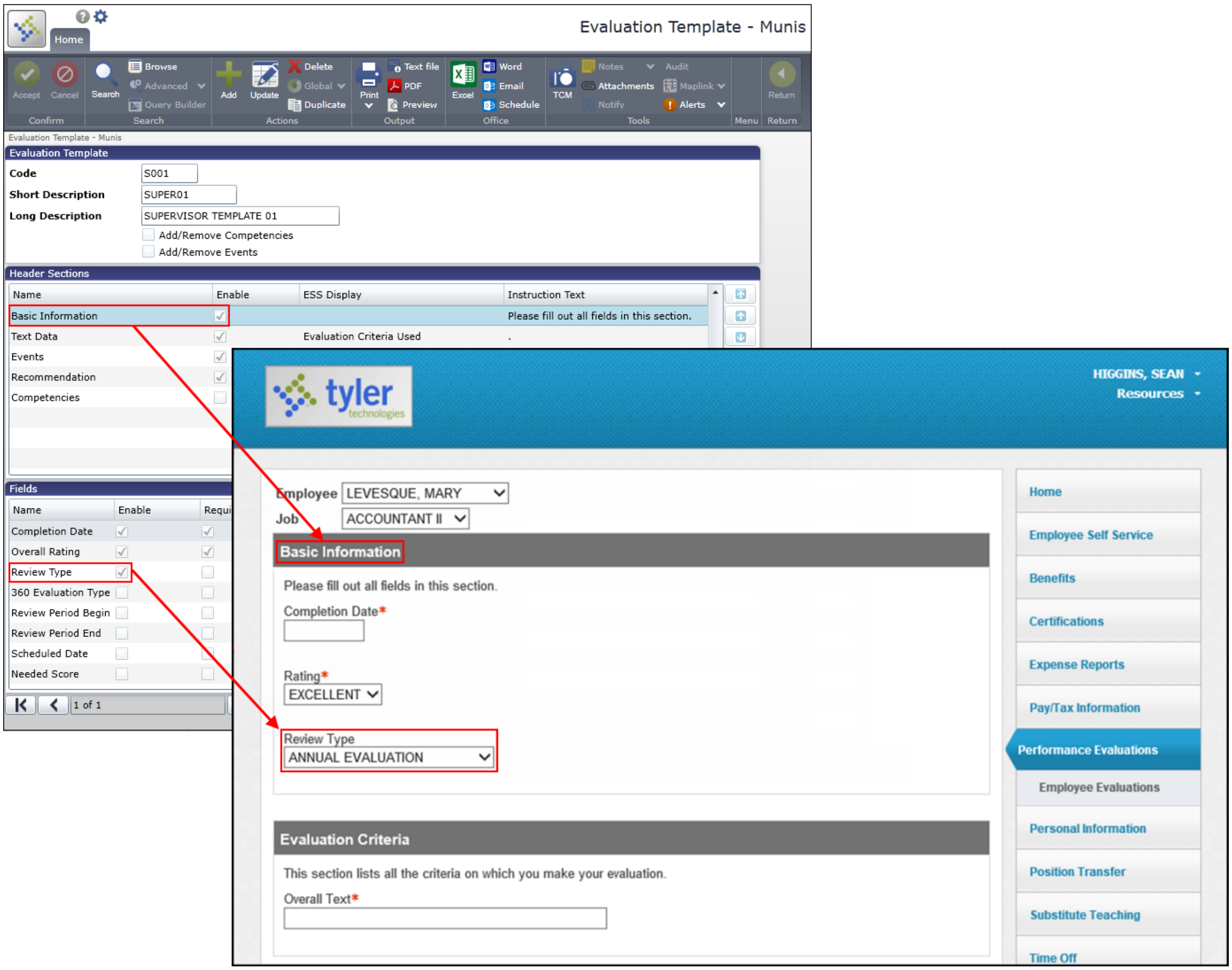


These fields are also available for entry when you select Add Emergency Contact to add a new contact.

Employee Evaluations

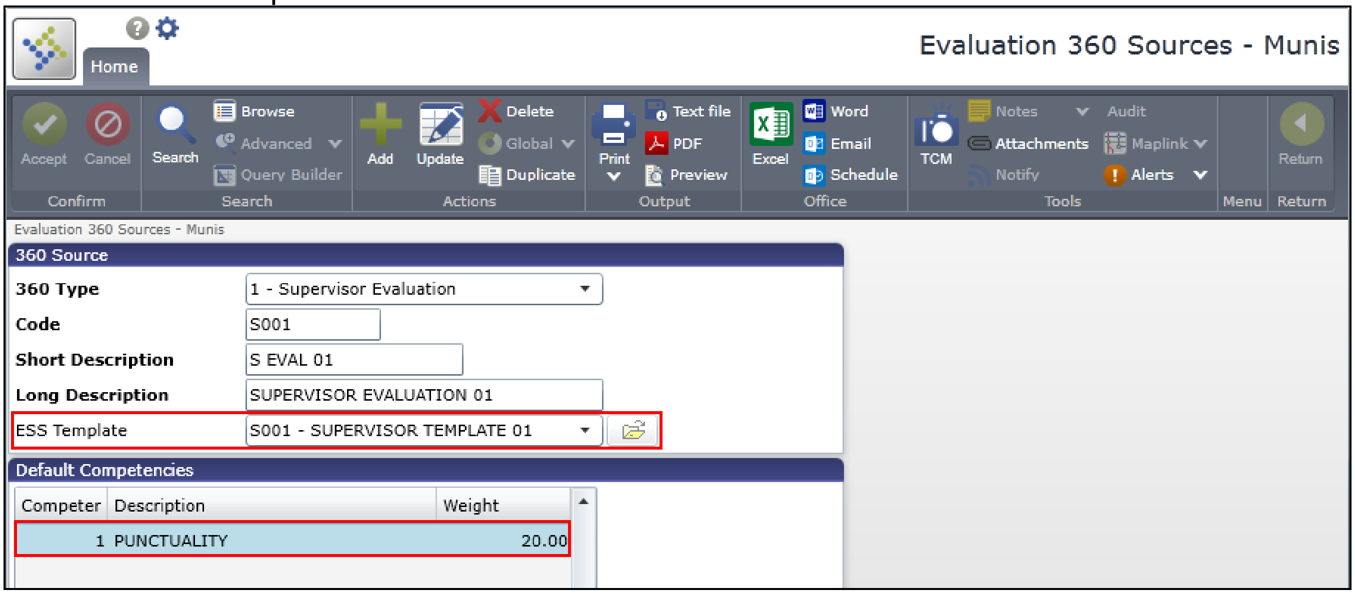
New programs are available for customizing ESS employee evaluation forms.

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.

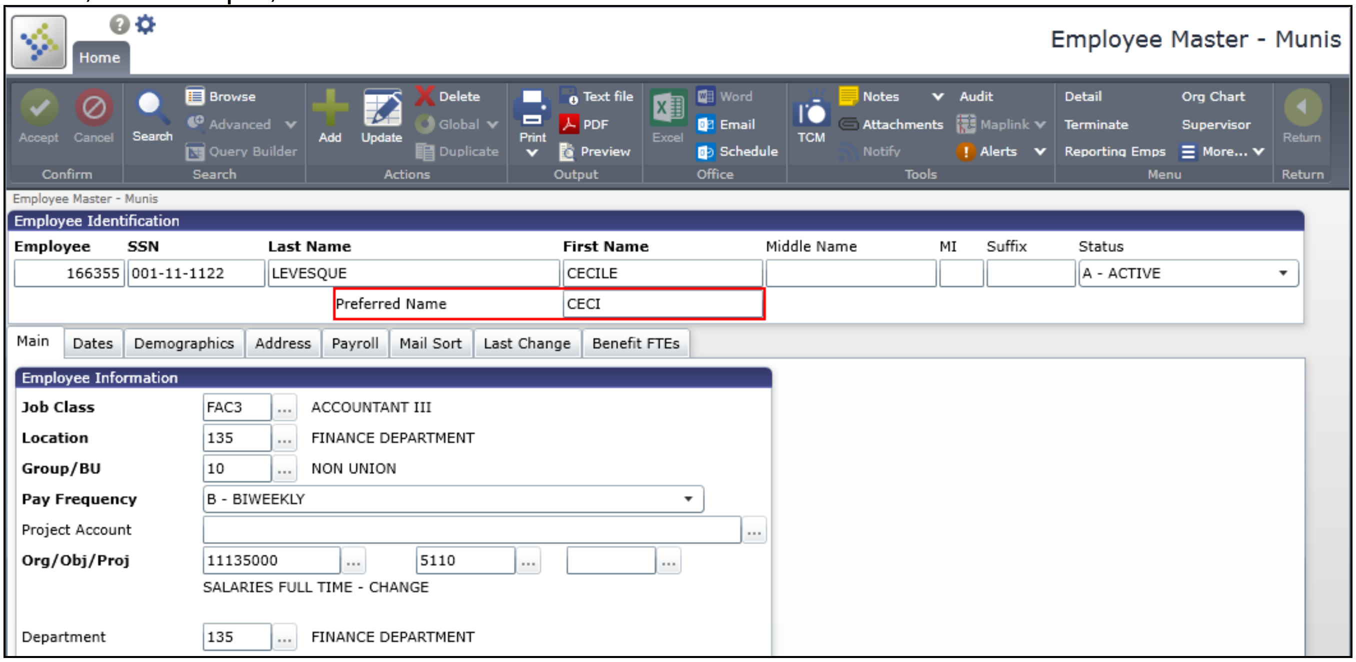


Use the ESS Template list to select a template to associate the evaluation source code with. You can associate as many source codes with a single template as necessary. Use the Default Competencies fields to define the competencies for the source code. You can create multiple evaluation forms from the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

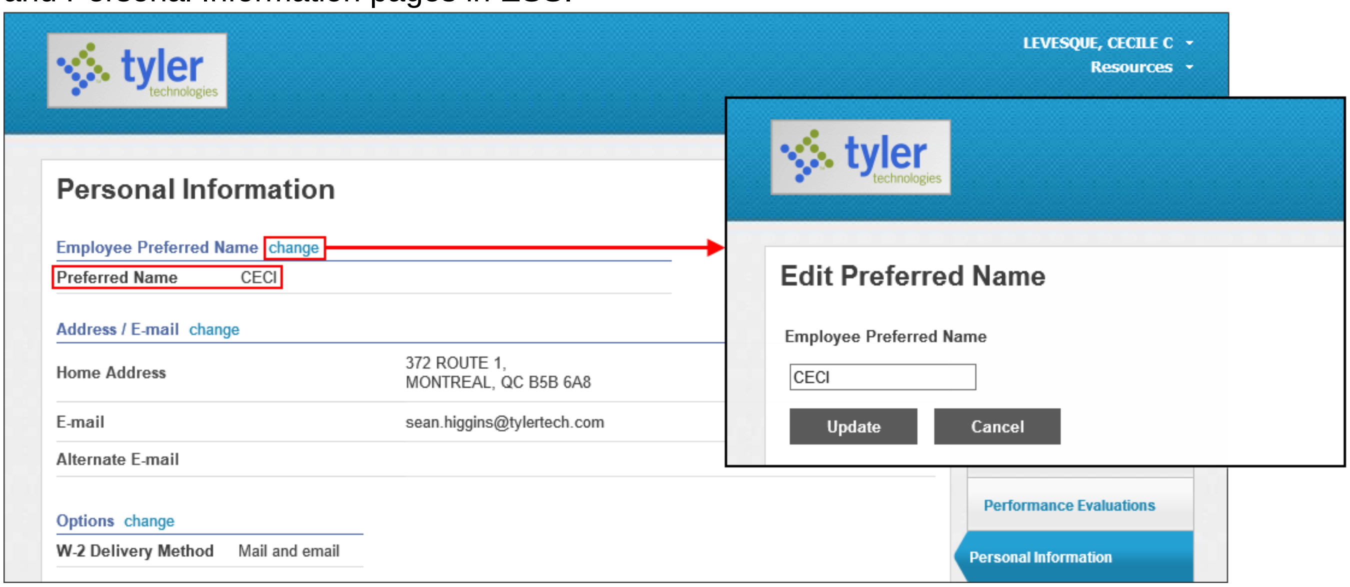
When you add an evaluation for an employee in ESS, the program checks the evaluation source code on the employee’s job class and generates the evaluation form with the competencies and template defined on that source code.

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.



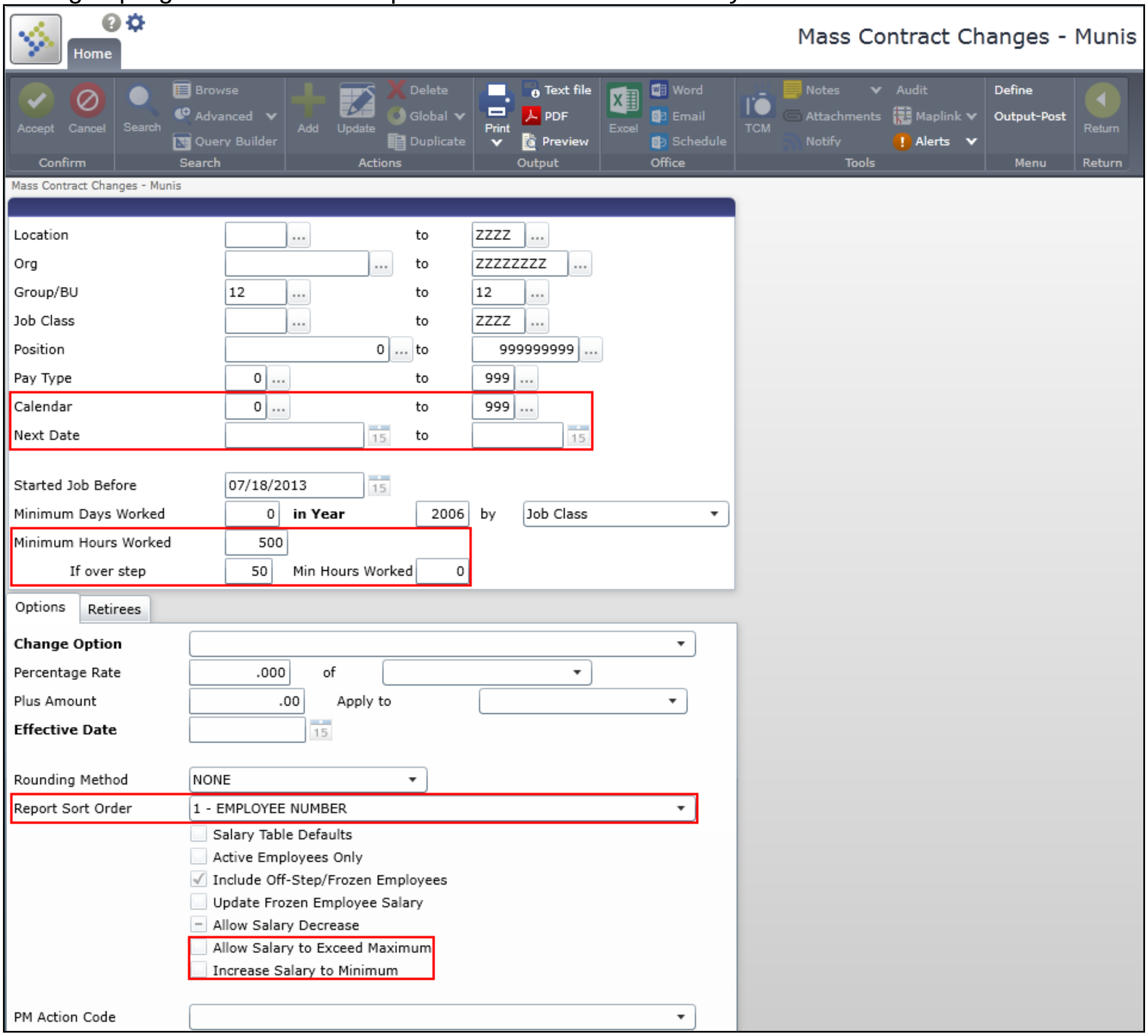
View the preferred name attached to your Employee Master record on the Employee Profile and Personal Information pages in ESS.



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

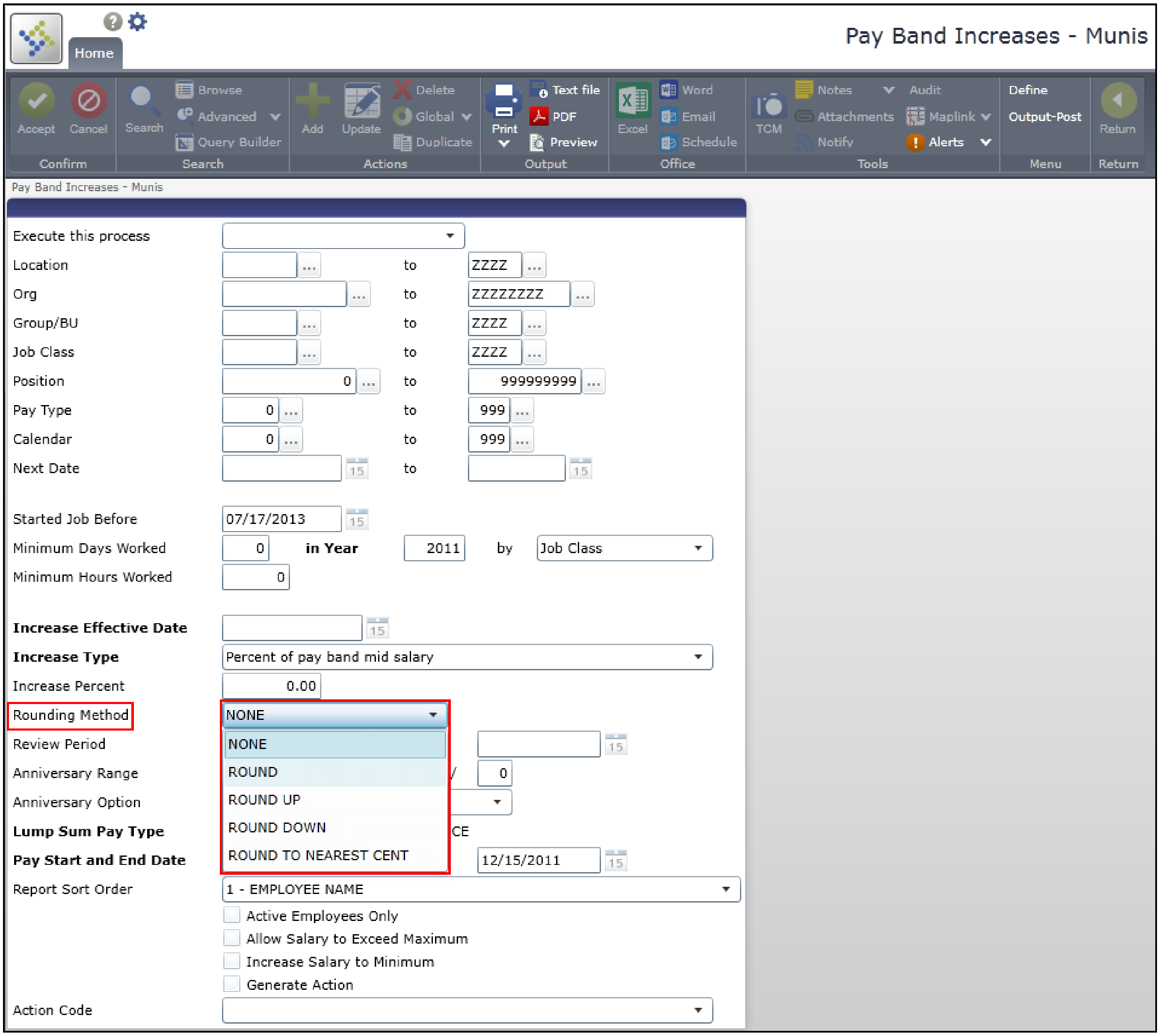
The generation options in the Pay Band Increases, Mass Step Increases, and Mass Contract Changes programs have been updated to ensure consistency.



- 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.

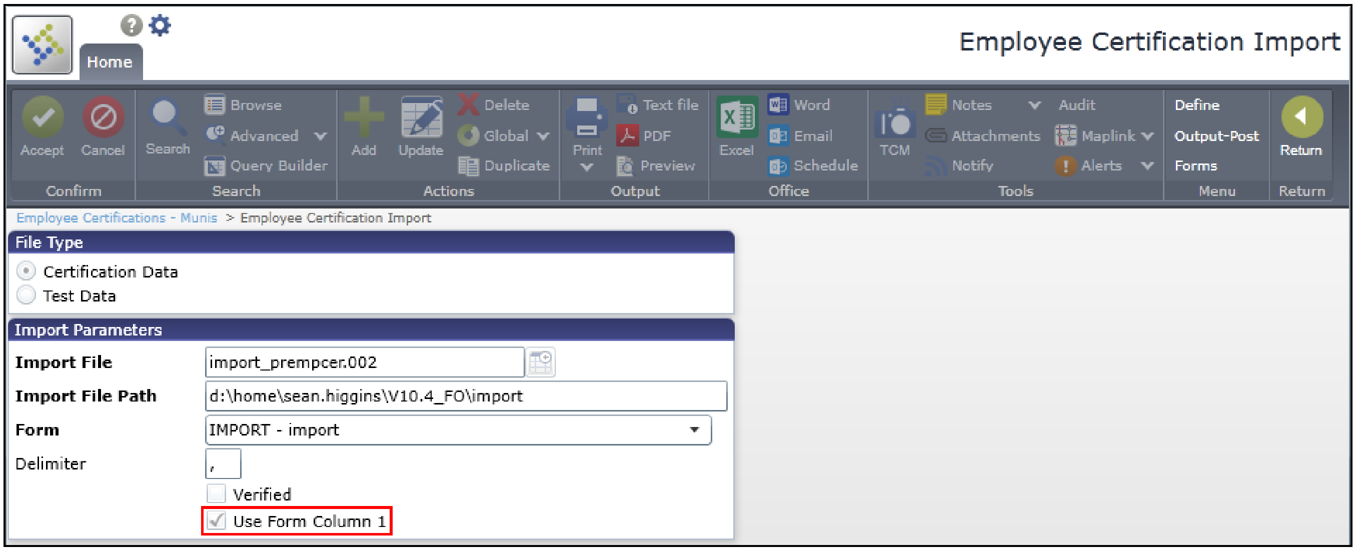


Employee Certification Options

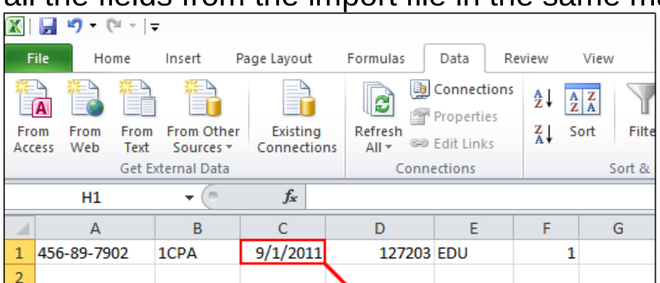
The Position Control programs have been expanded to include new employee certification fields and options.

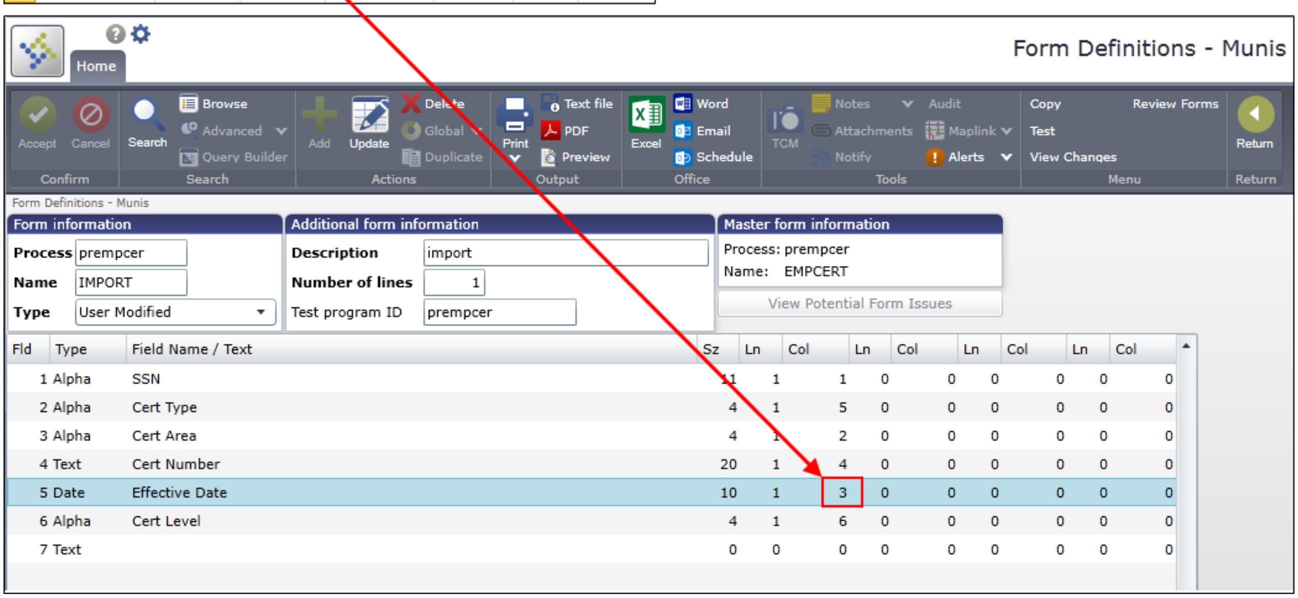
Employee Certifications

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.



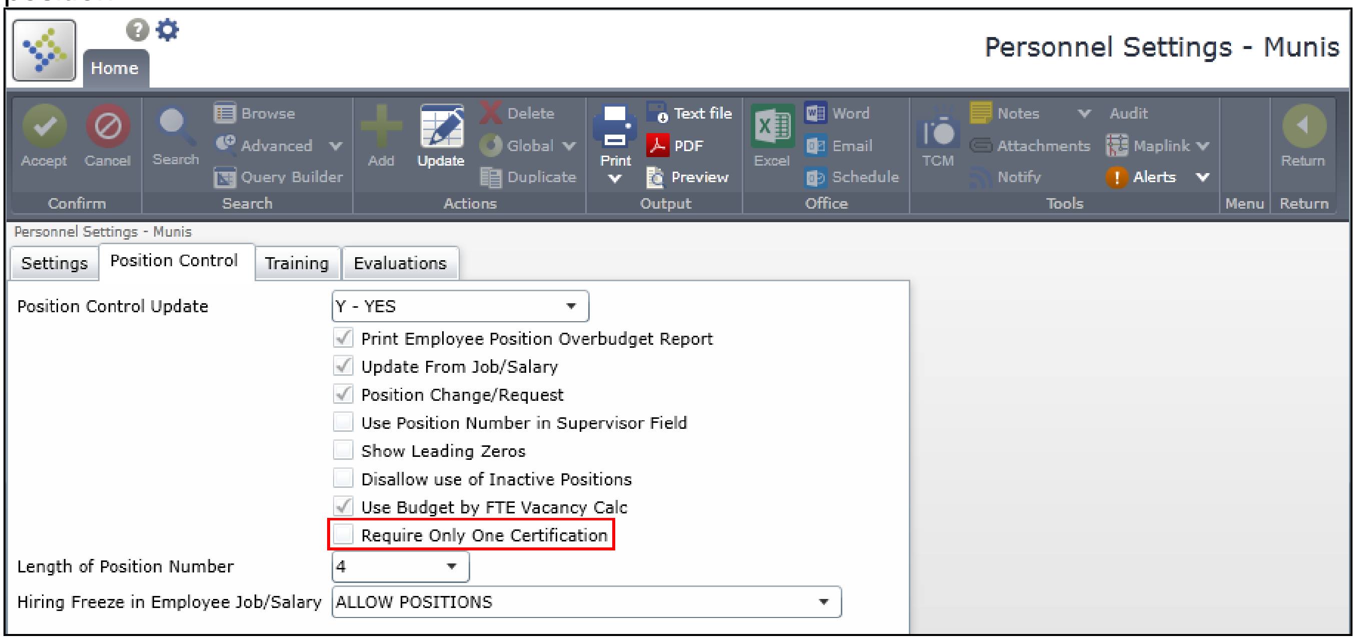
For instance, if you enable this option and the Effective Date values are in the third column of your csv import file, enter a value of 3 in the first Column field in the Effective Date row. Define all the fields from the import file in the same manner and the program reads it properly.





Personnel Settings

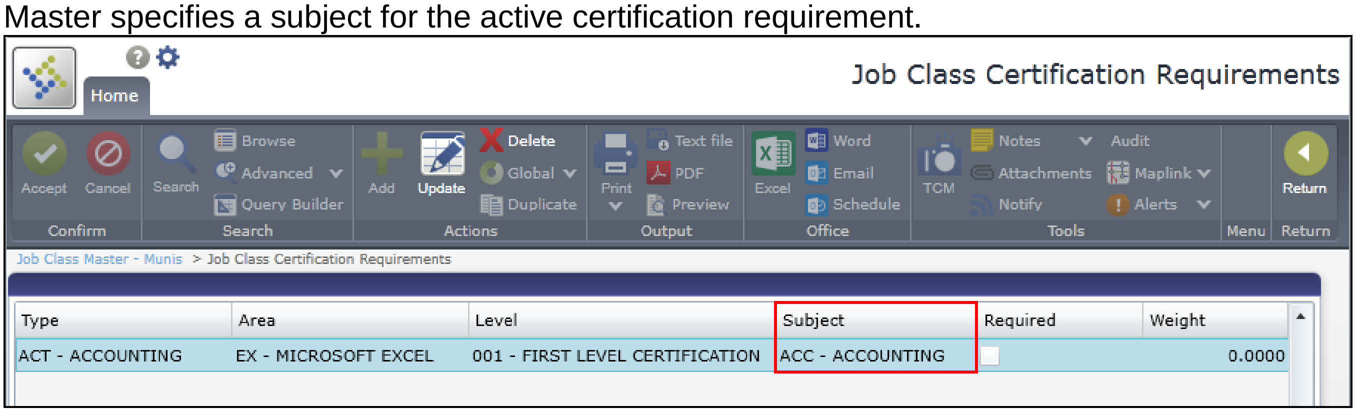
The Require Only One Certification check box on the Position Control tab in the Personnel Settings program configures the Position Control programs to require that employees meet only one or more of the specified certification requirements for any position to qualify for that position.



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

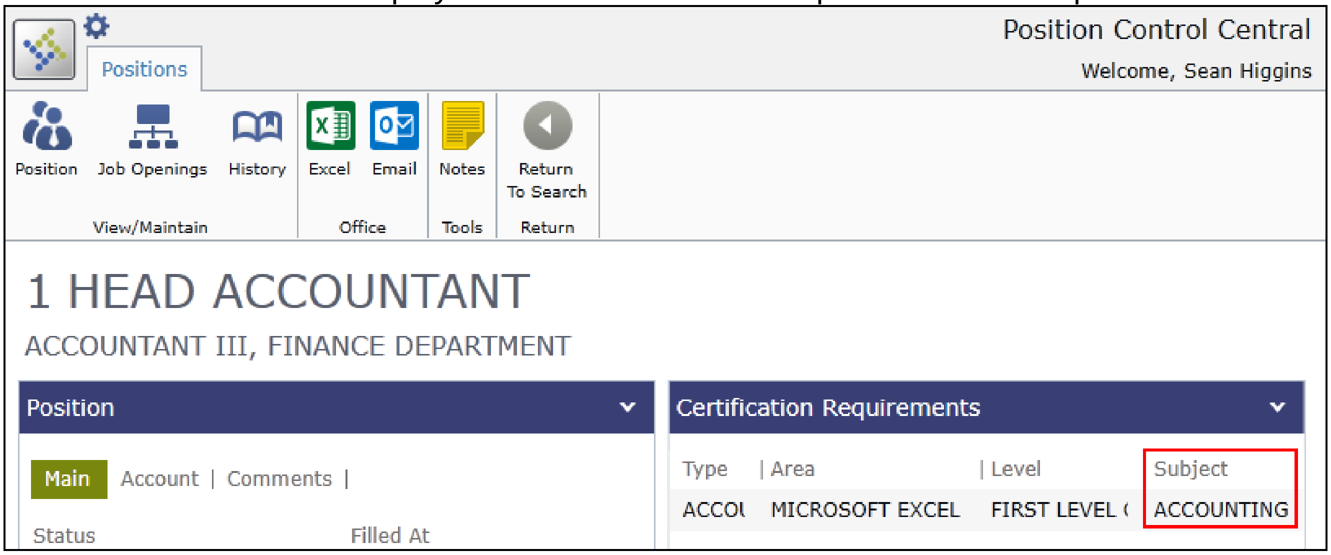
Position Control

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



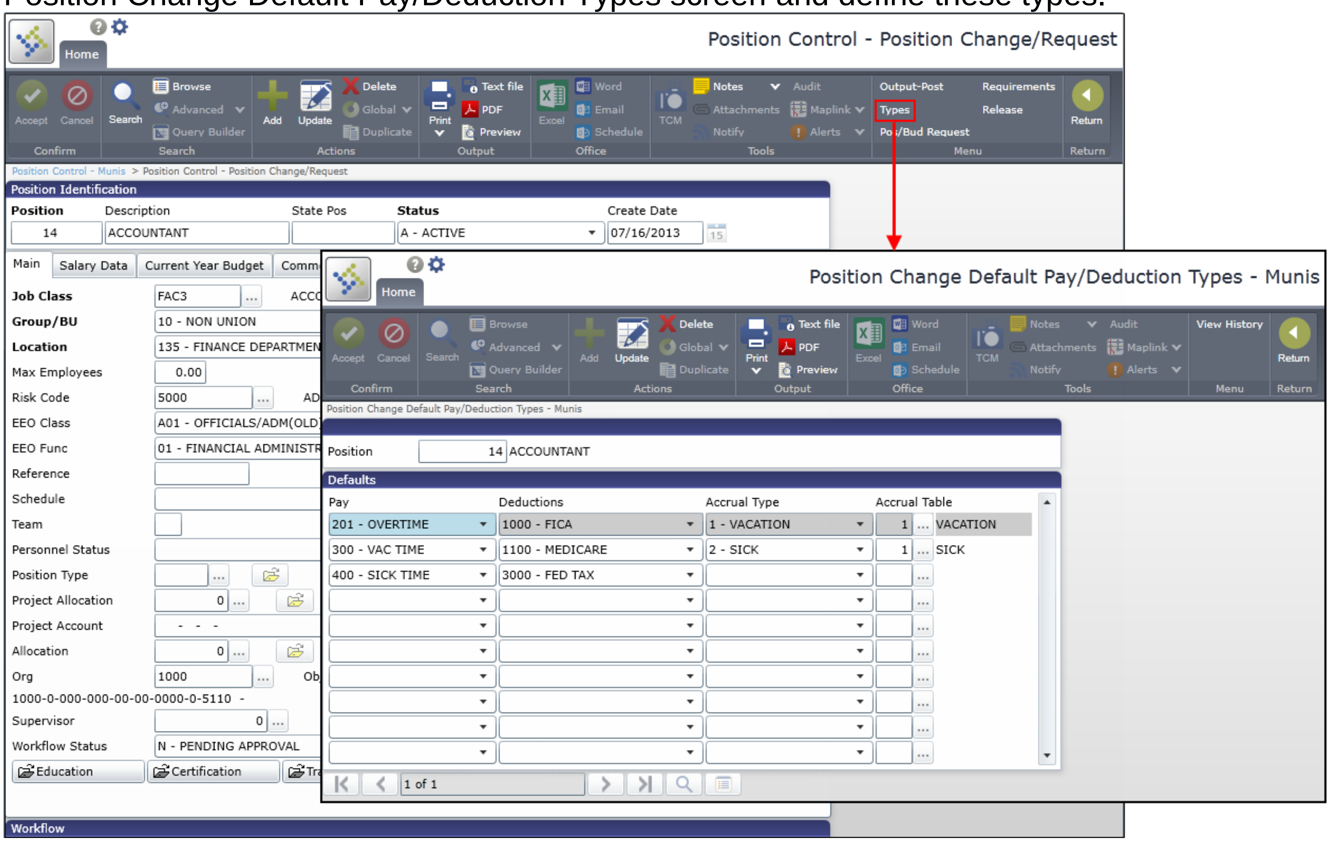
The values in this list are drawn from the subject matter codes (SUBJ) defined in the Payroll Miscellaneous Codes program. This field is not required; if you do not complete the subject field when defining position or job class requirements, position control does not use it when verifying that an employee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

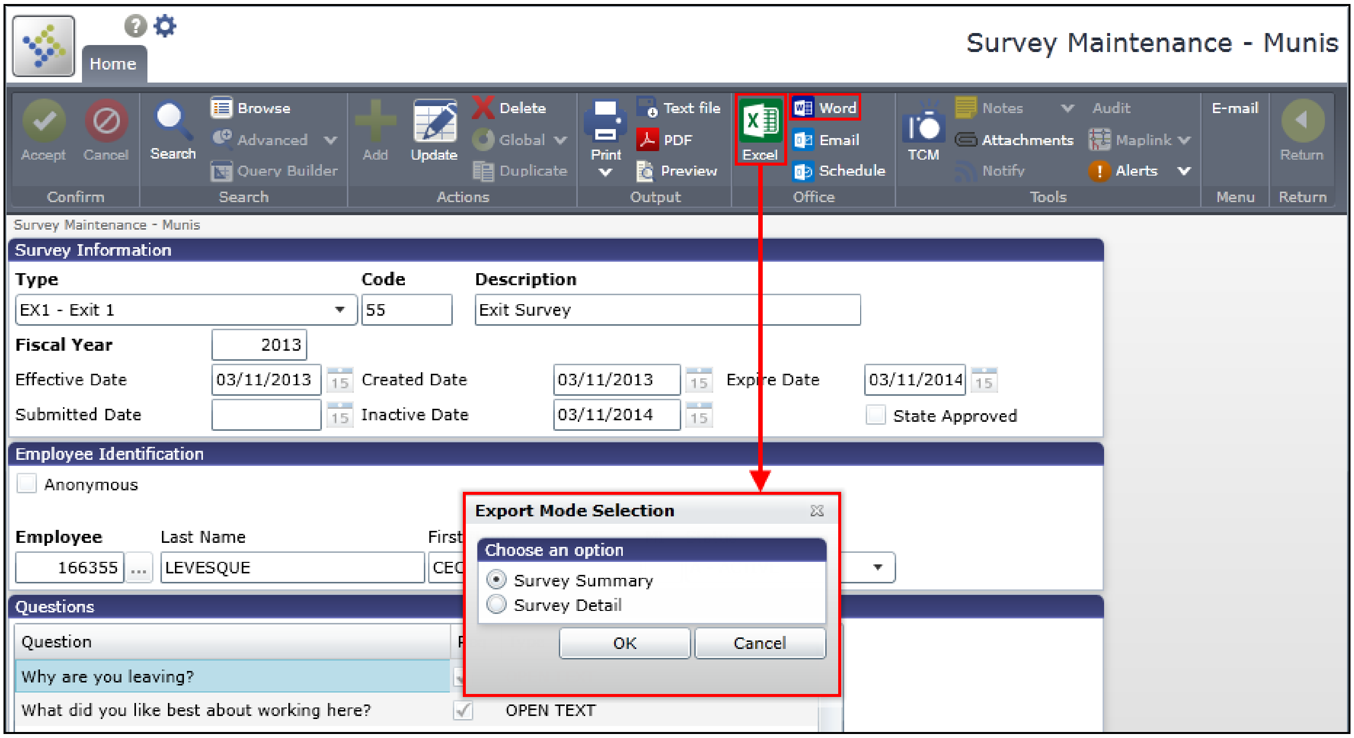
The Position Control program allows you to define default pay and deduction types for the active position. Click the Types option on the Position Change/Request screen to display the Position Change Default Pay/Deduction Types screen and define these types.



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.



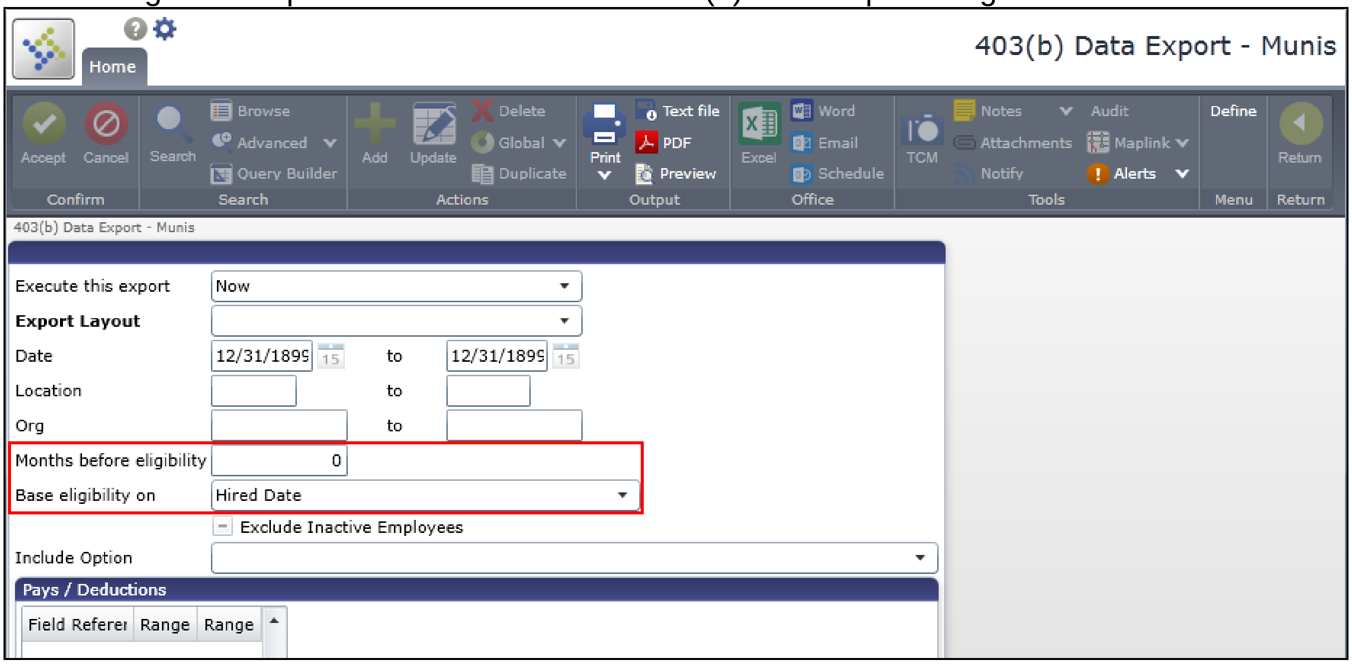
When you select one of these options, the program offers the choice of exporting a summary report or a detail report. The Survey Summary report includes the data available on the browse screen; the Survey Detail report includes survey response data as well.

Payroll for Version 10.4

The following changes apply to Munis Payroll programs.

403(b) Data Export

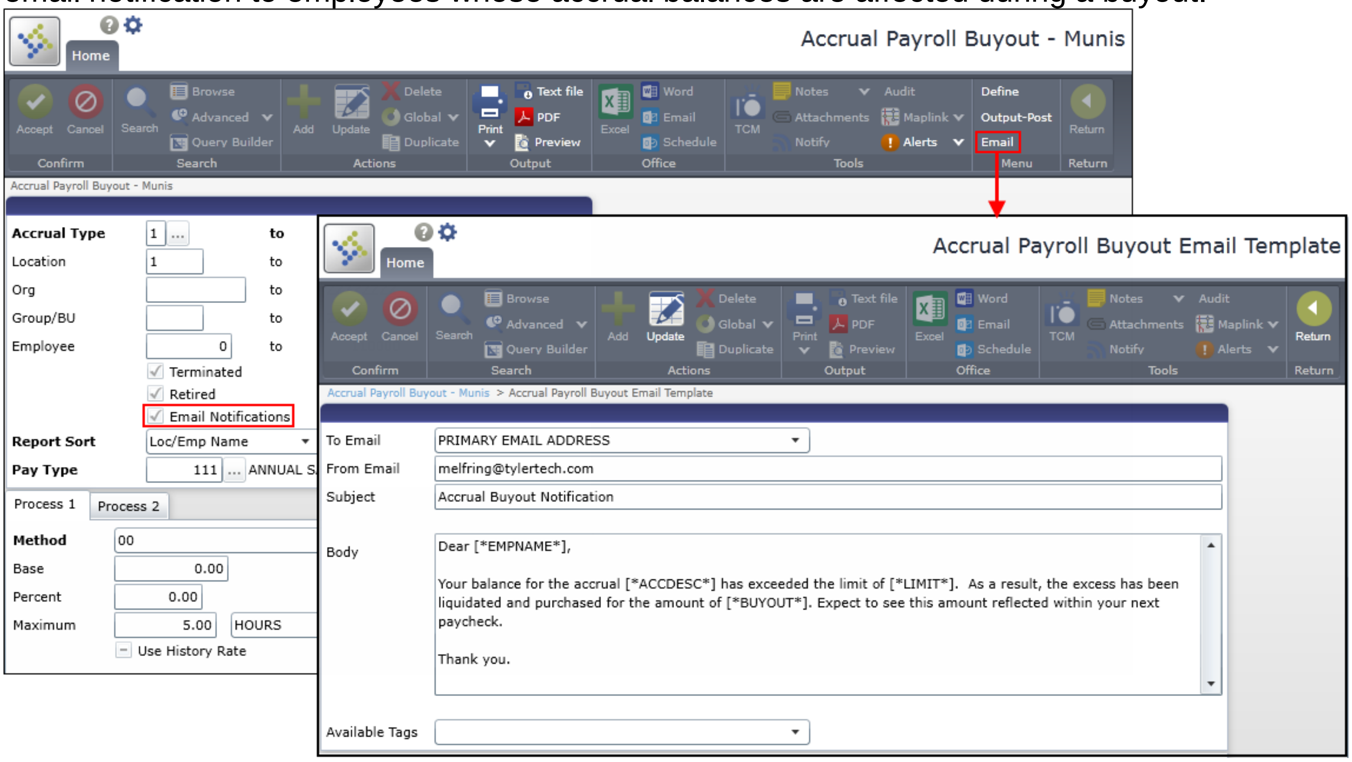
New configuration options are included in the 403(b) Data Export Program.



- 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

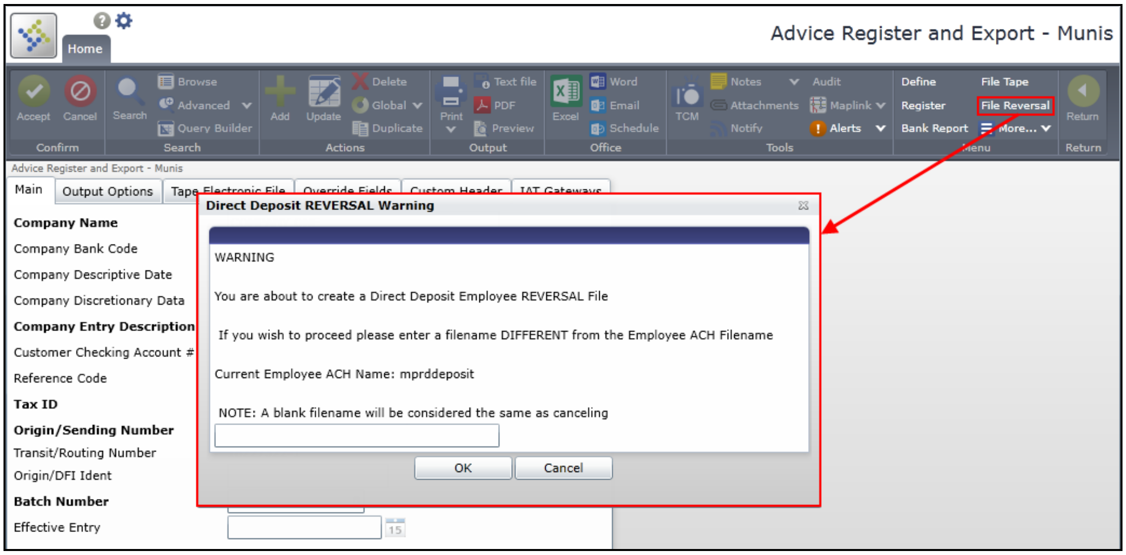
The Email Notifications option in Accrual Payroll Buyout configures the program to send an email notification to employees whose accrual balances are affected during a buyout.



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

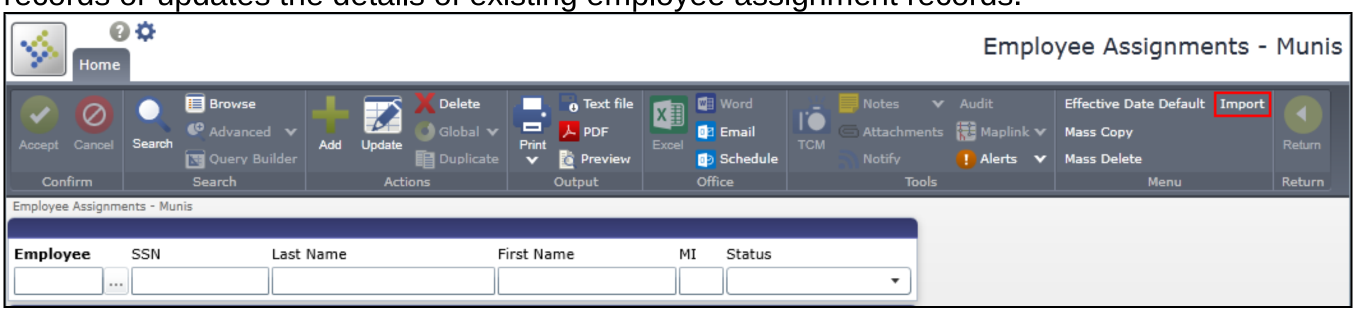
The Advice Register and Export program displays a warning when you select the File Reversal or Vendor Reversal options. This prevents you from performing an accidental reversal.



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.



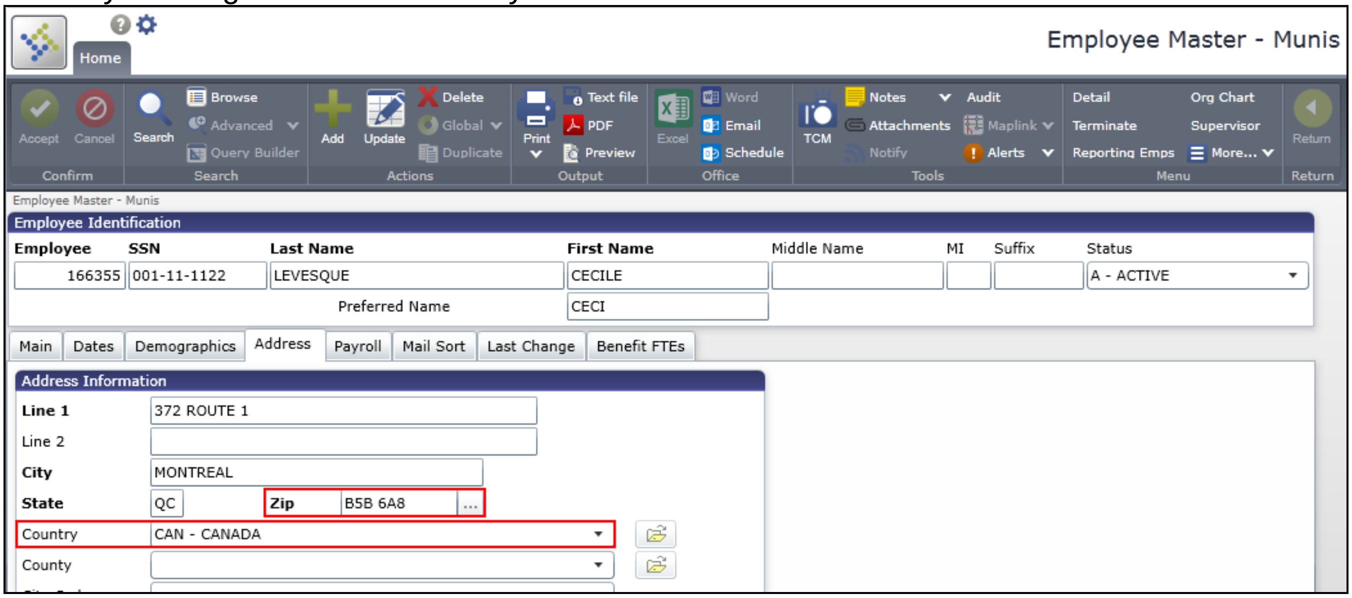
If you import an employee assignment record and a record based on the same employee, assignment, and location already exists in the program, the program updates the existing record to reflect an end date of one day prior to the effective date of the new record.

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

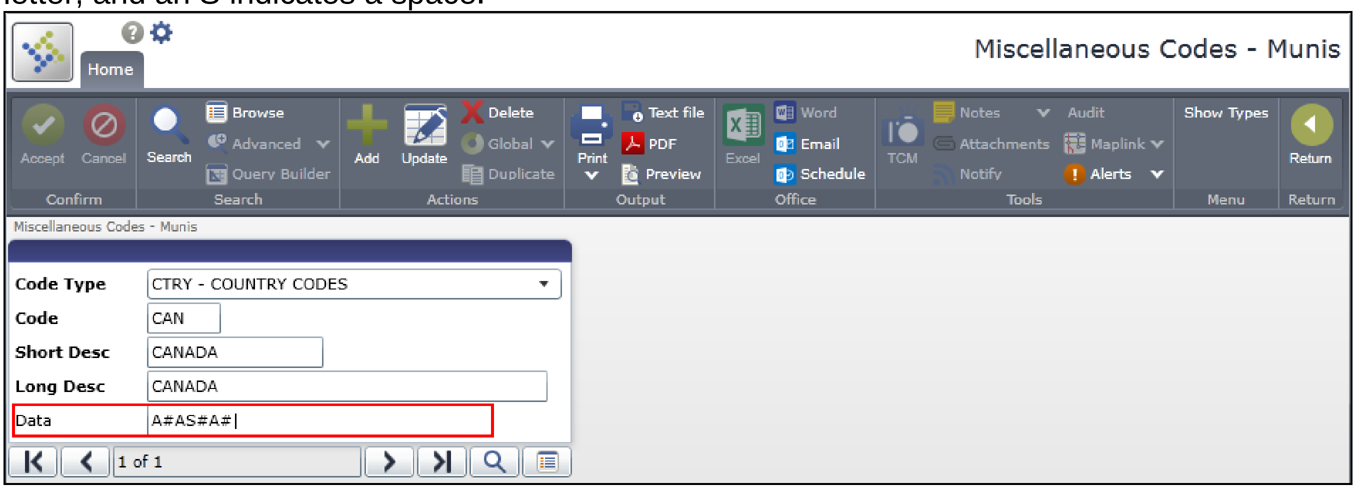
Employee Master

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.

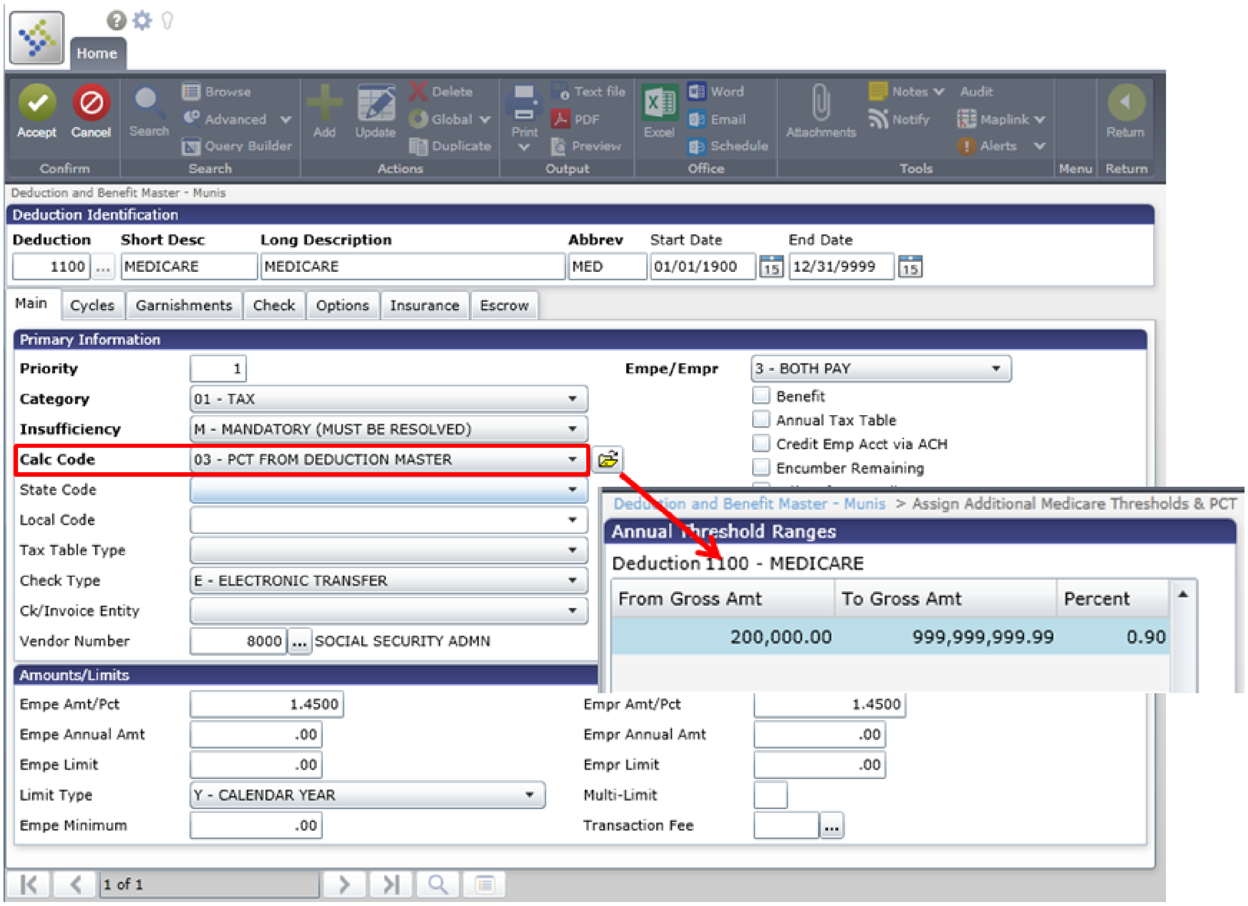


Medicare Tax for High Earners

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

Deduction and Benefit Master

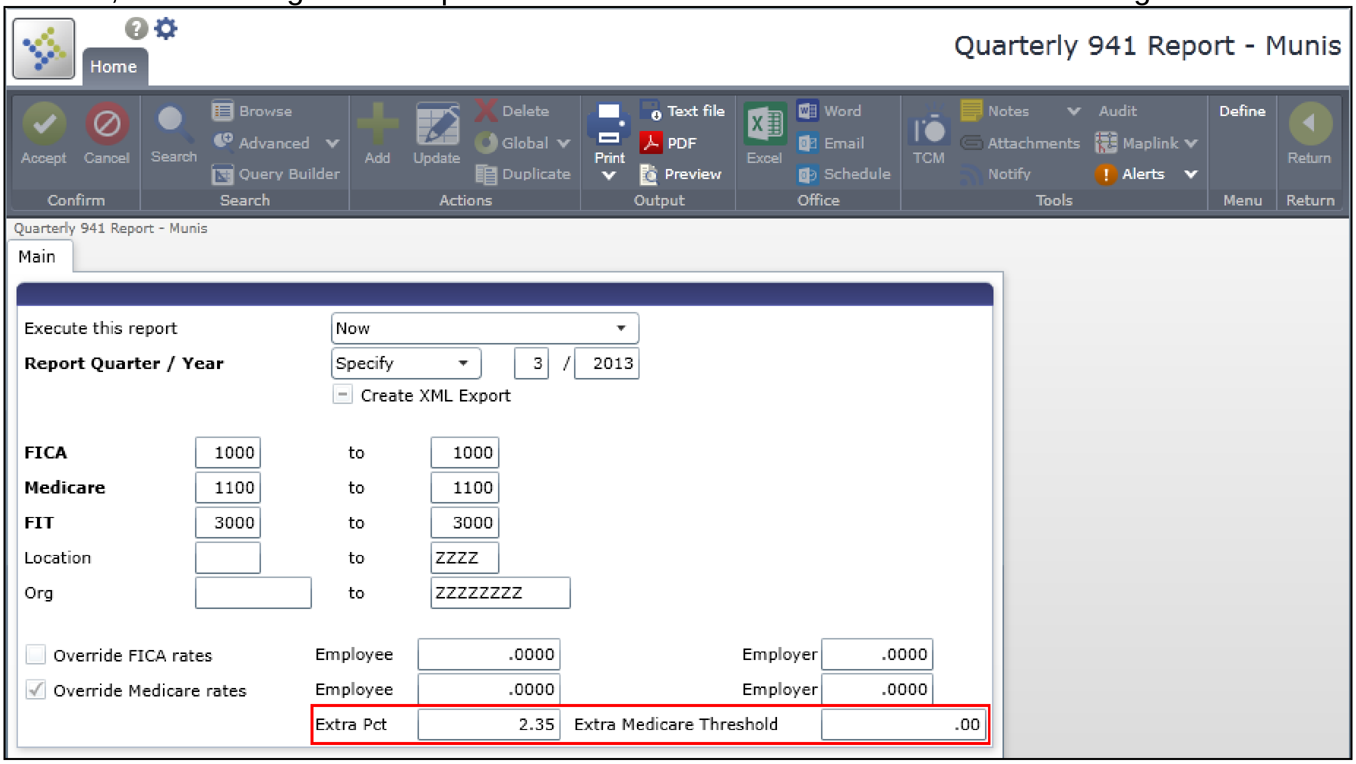
In Deduction and Benefit Master, the Assign Additional Medicare Thresholds & PCT function configures the additional Medicare tax for high earners. To access this function, click the folder button next to the Calc Code list. It is available only for Medicare deductions with a calc code of 3 - PCT From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

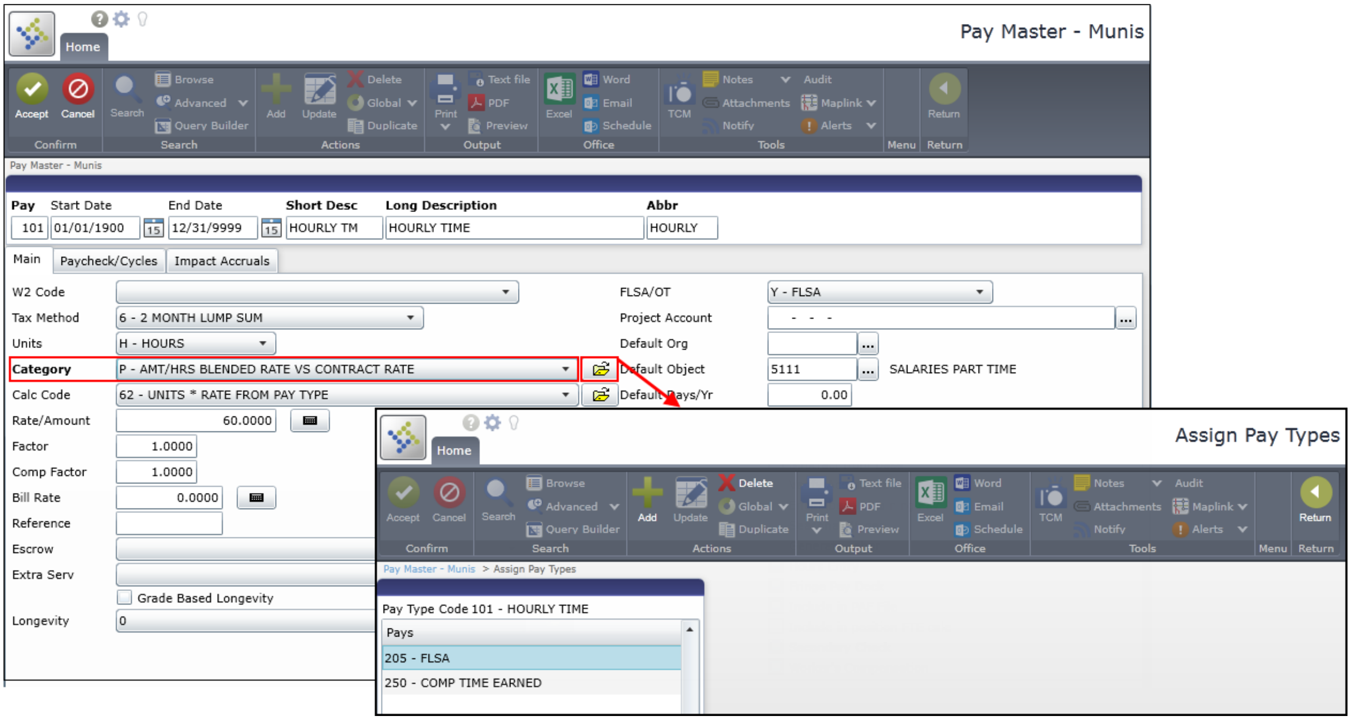


Use the Extra Medicare Threshold box to define the year-to-date wage amount over which the additional Medicare withholding is applied. Use the Extra Pct box to define the extra percentage withheld.

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

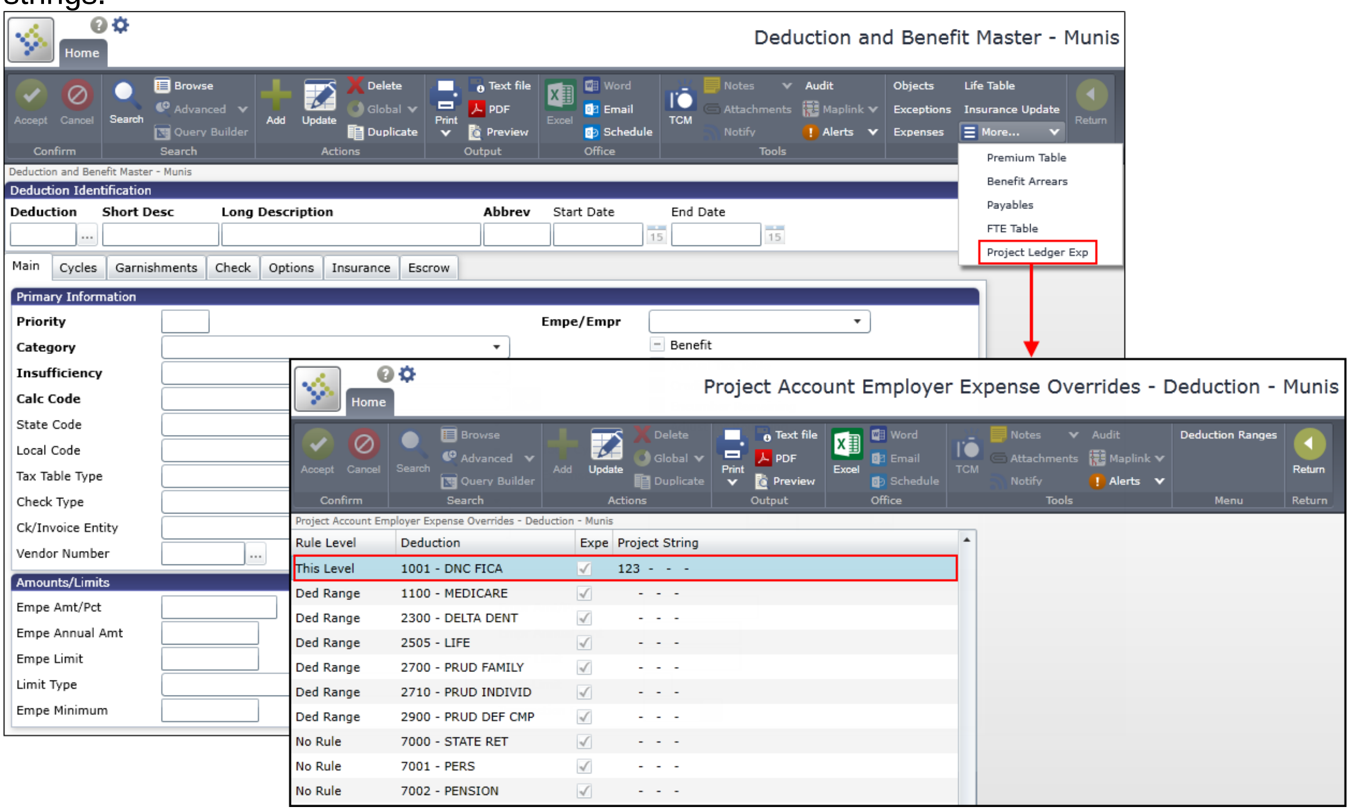
Category	Setting	Description
Check	Paycodes for Nonzero Fiscal YTD	This option, when enabled, sets the system to print all pay codes with a non-zero fiscal year-to-date total rather than a non-zero calendar year-to-date total.
Default Numbers	Next Pending Actions Number	This option defines the default 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

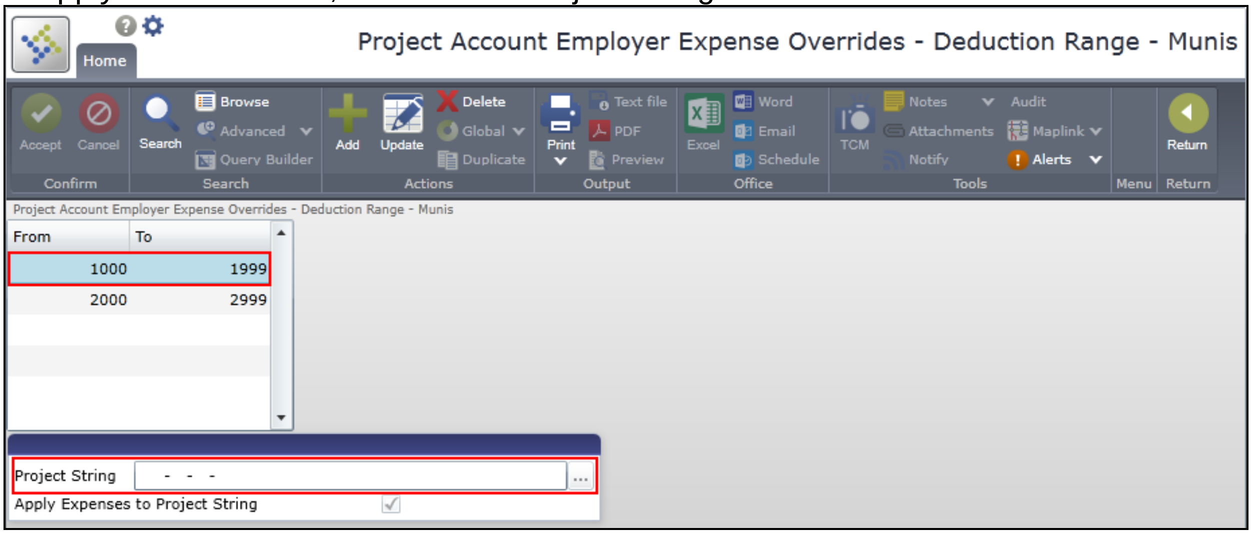
The Project Account Employer Expense Overrides program defines project string overrides, which adjust how the project ledger expenses the employer share of deductions for employee benefits.

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.

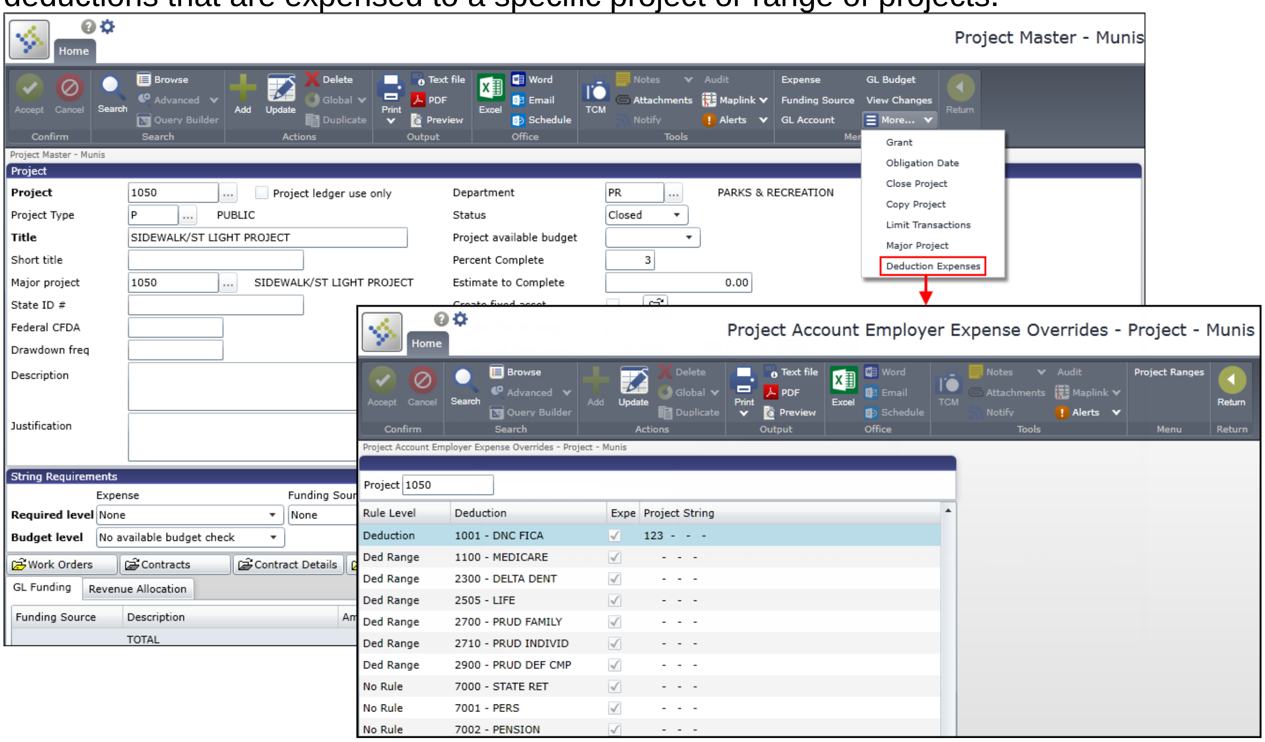


For example, if you select the Project String field for a deduction and define an override with a value of 123- - - , the program overrides the first segment of that deduction's project string with a value of 123.

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.



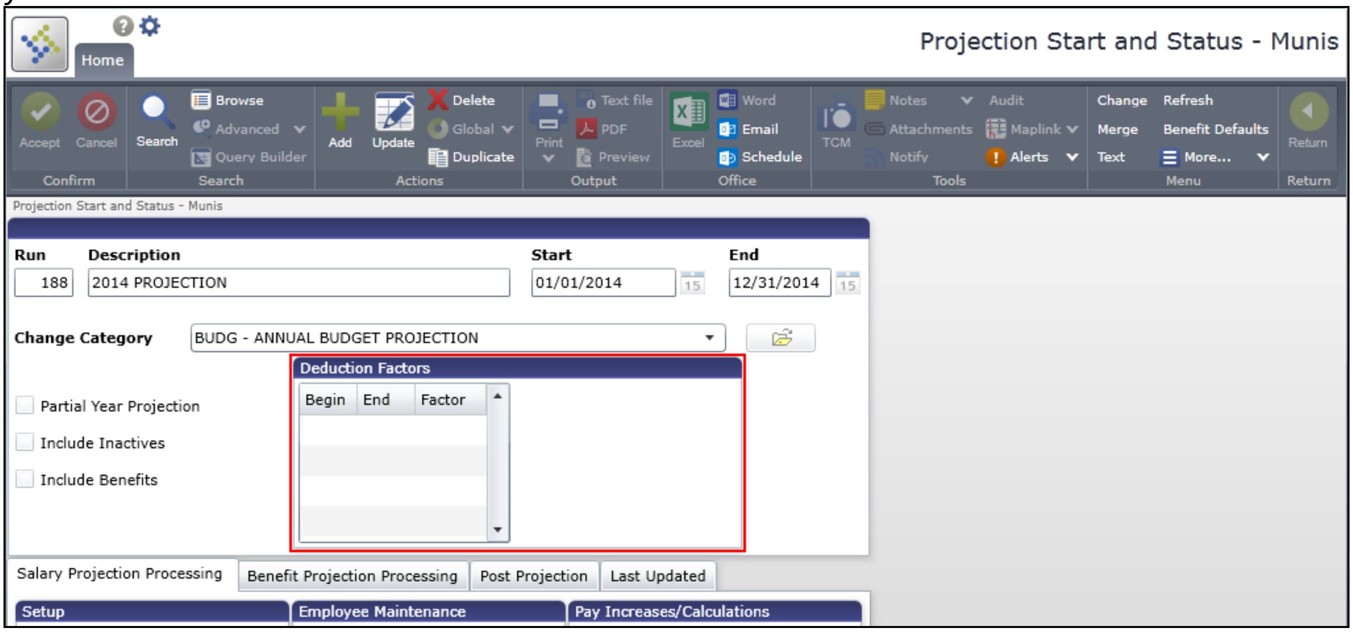
In Project Master, click Deduction Expenses to open the Project Account Employer Expense Overrides program in the project mode. This mode specifies project string overrides for deductions that are expensed to a specific project or range of projects.



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.

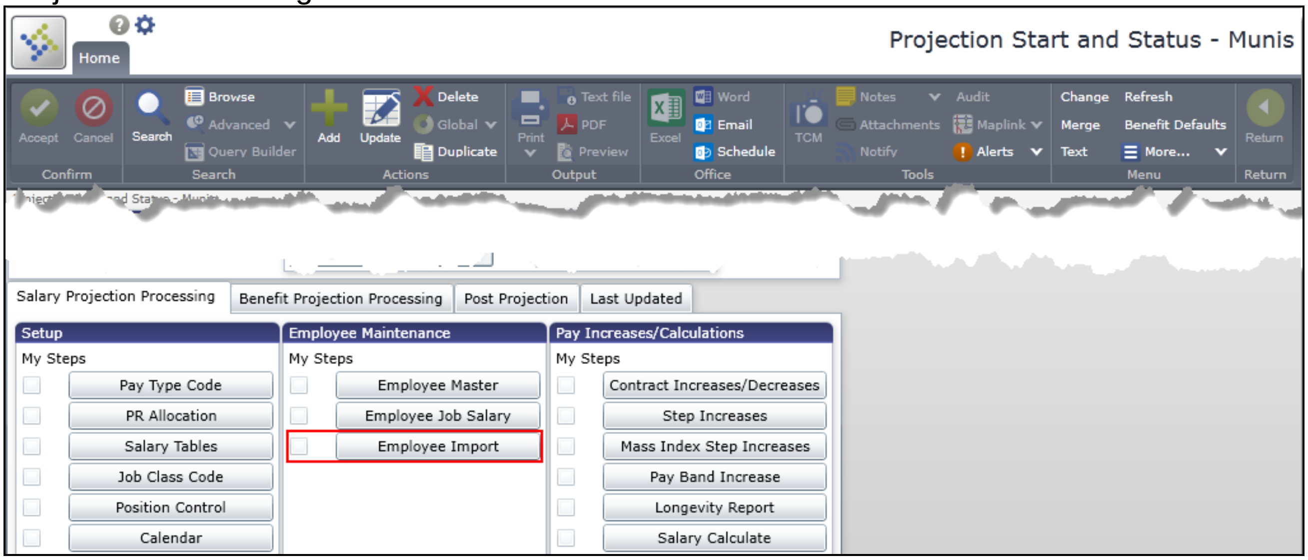


Use the Begin and End boxes to define the range within which the deductions fall. Use the Factor box to indicate the number of periods per year the deduction is taken. For instance, if health insurance deductions with calc code 22 (monthly premium) are taken 10 months out of the year rather than all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

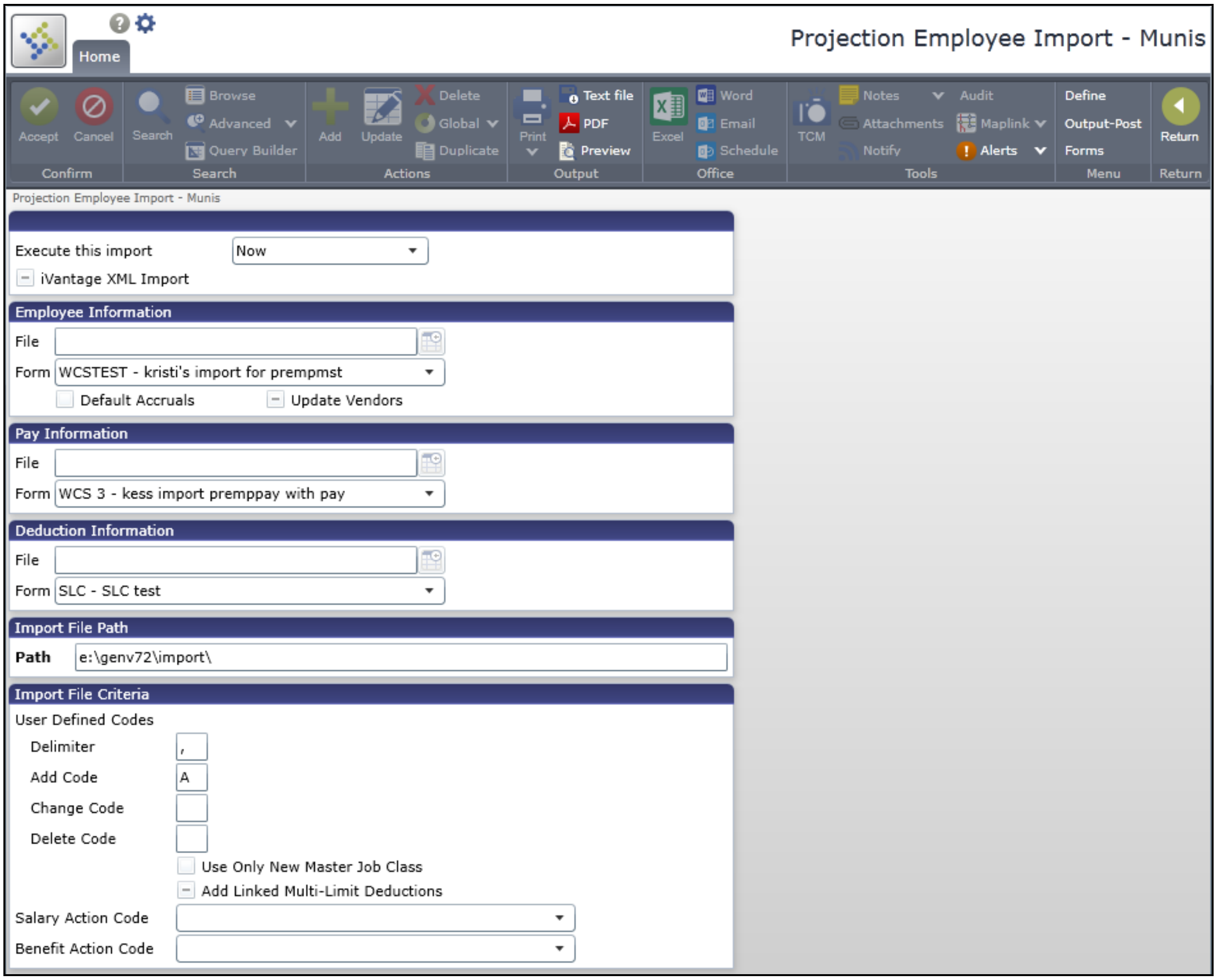
These fields are available for use only with deductions that have one of the following calc codes:

- 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.



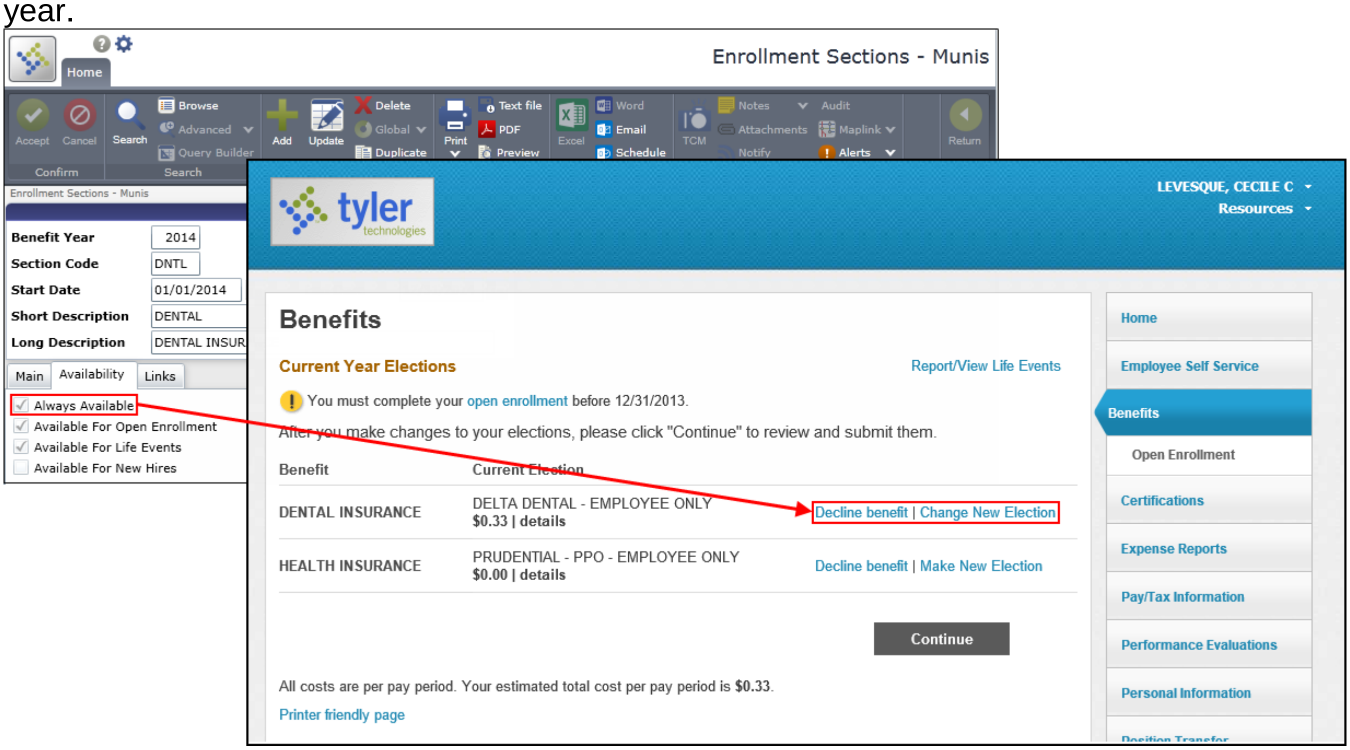
This button opens the Projection Employee Import program, which imports employee data into your projection from an external source.


Projection Employee Import - Munis
Home
Accept Cancel Search Browse Advanced Query Builder Add Update Delete Global Duplicate Print Text file PDF Preview Excel Word Email Schedule TCM Notes Attachments Notify Audit Maplink Alerts Define Output-Post Forms Return
Confirm Search Actions Output Office Tools 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

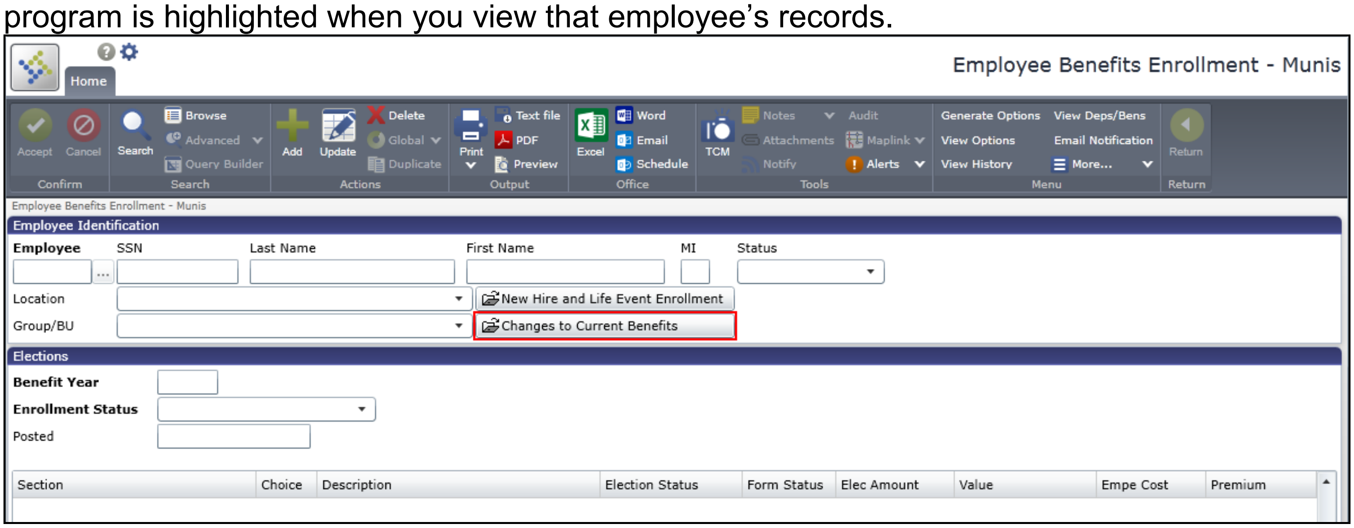
Employee Self Service

Benefits

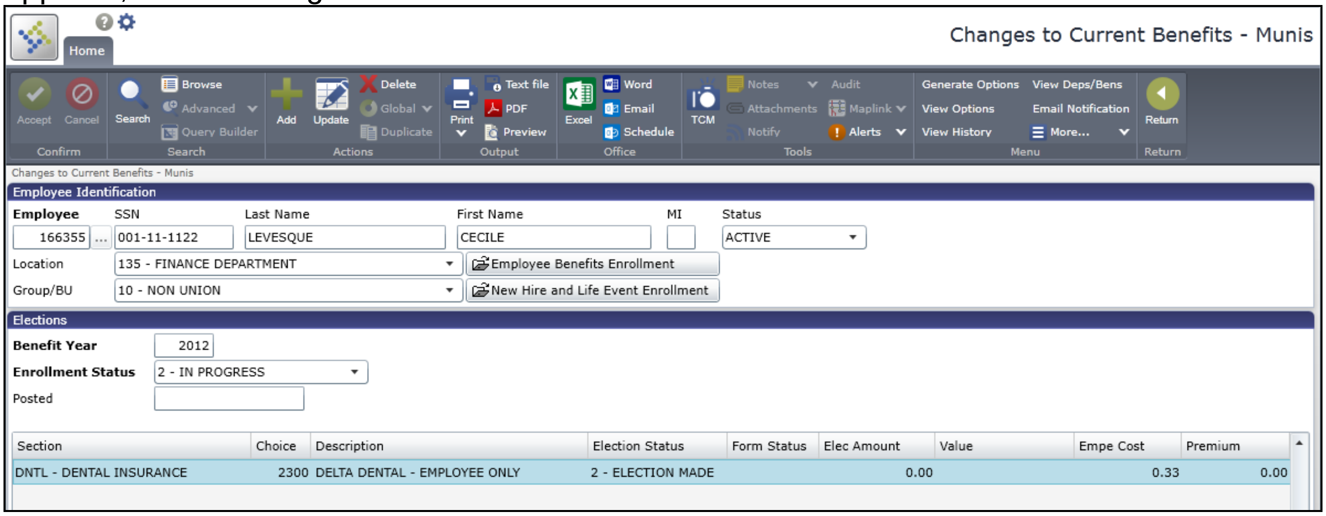
The Employee Self Service (ESS) Benefits Page displays the Make New Election and Decline Benefit options for benefit sections that are designated as always available in the Enrollment Sections program. As a result, employees can change elections for these sections at any time of the
year.



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.

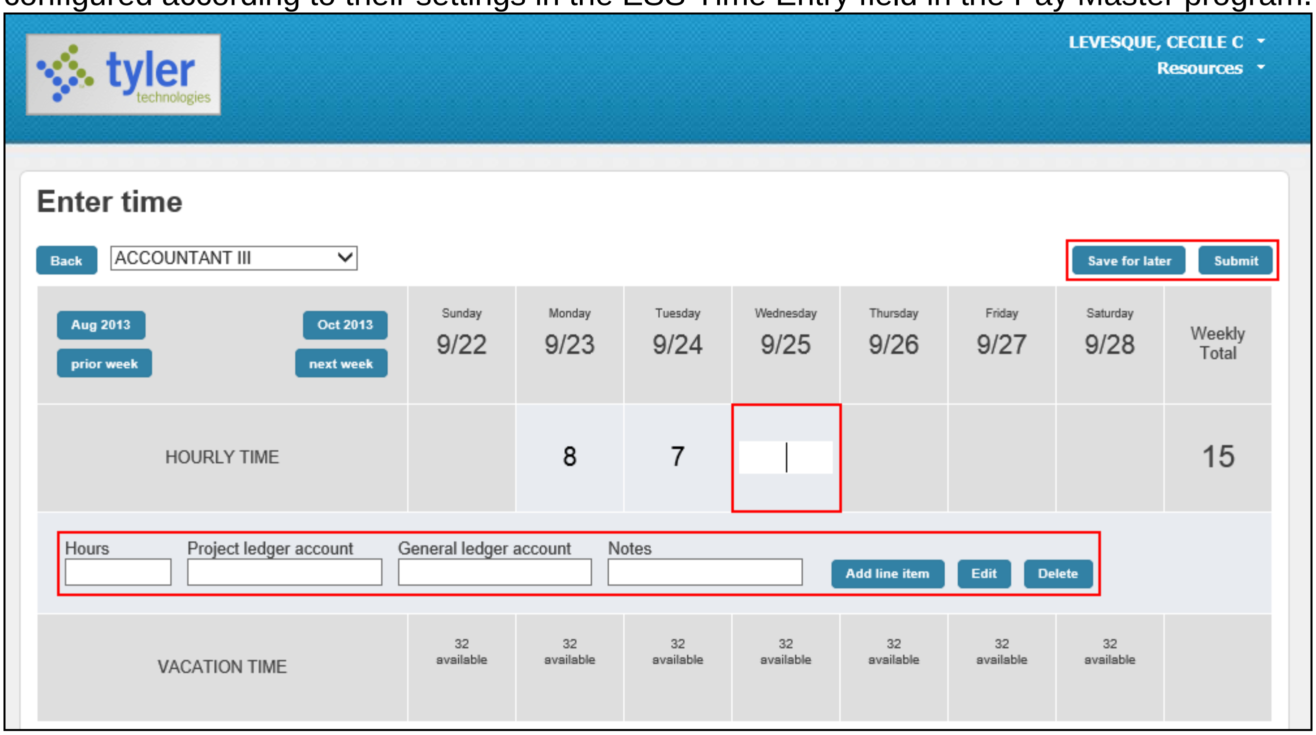


These enrollment records are processed in the same manner as Open Enrollment or Life Event records.

Time Entry

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

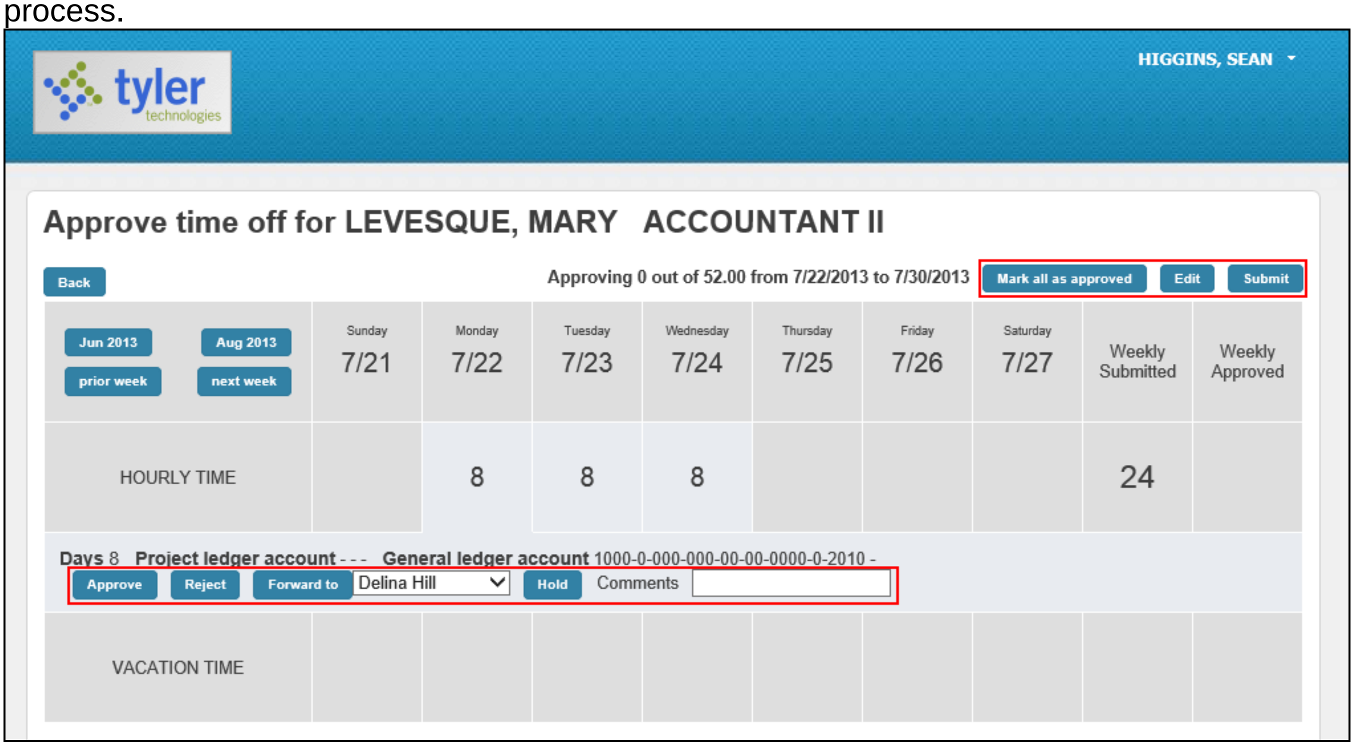
Click Enter Time on the ESS menu to display the Enter Time page. Fill out your time sheet by entering hours you have worked in the grid. To enter hours and additional details, select a box in the grid and use the fields provided. Pay types and accrual types are available and configured according to their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

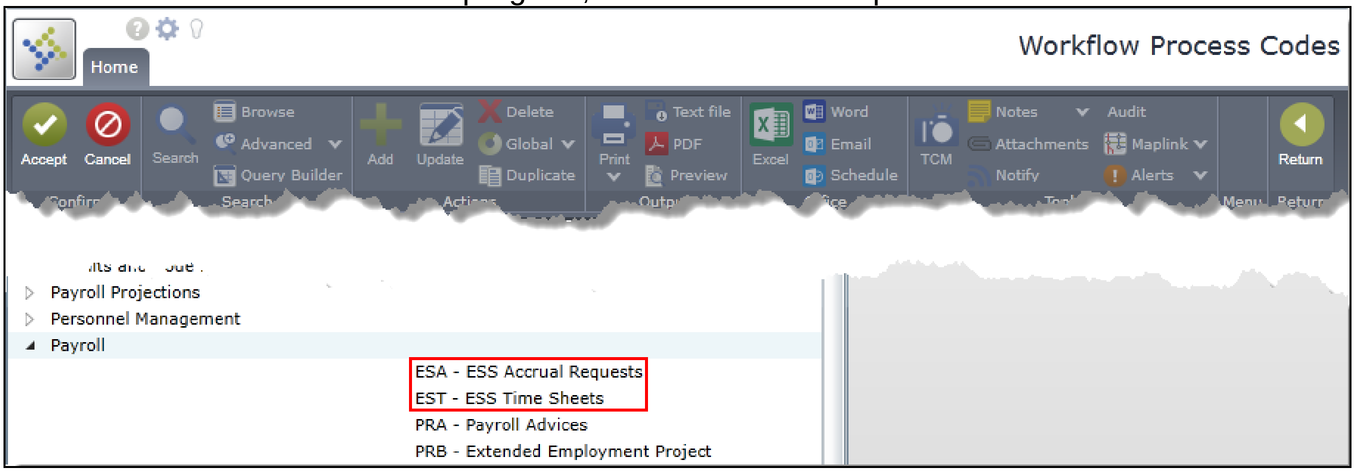


Use the Mark All as Approved button to approve all individual entries displayed; respond to each individual entry by clicking it in the grid and selecting one of the workflow options the program displays. Use the Edit button to update the time sheet. Click Submit to submit the time sheet.

Workflow

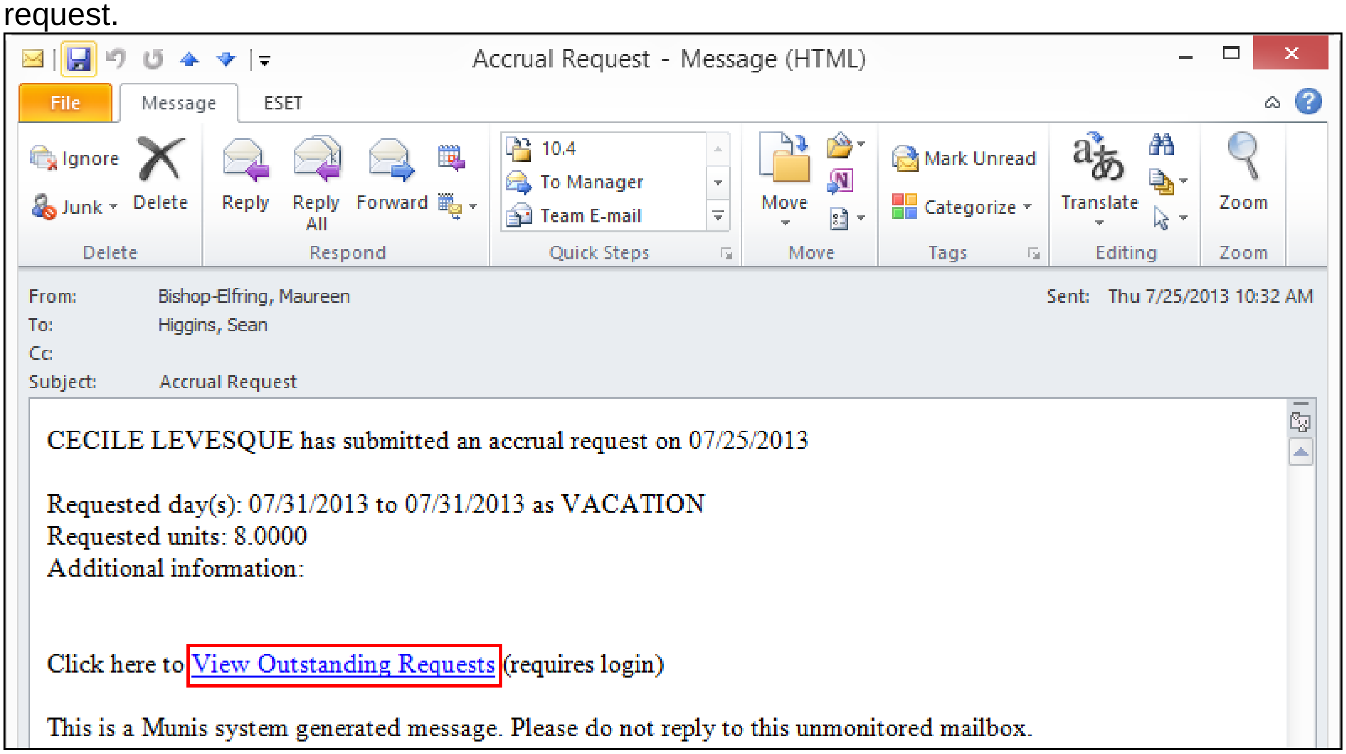
The Employee Self Service (ESS) accrual and time sheet approval processes have been updated to accommodate the Munis Workflow functionality.

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

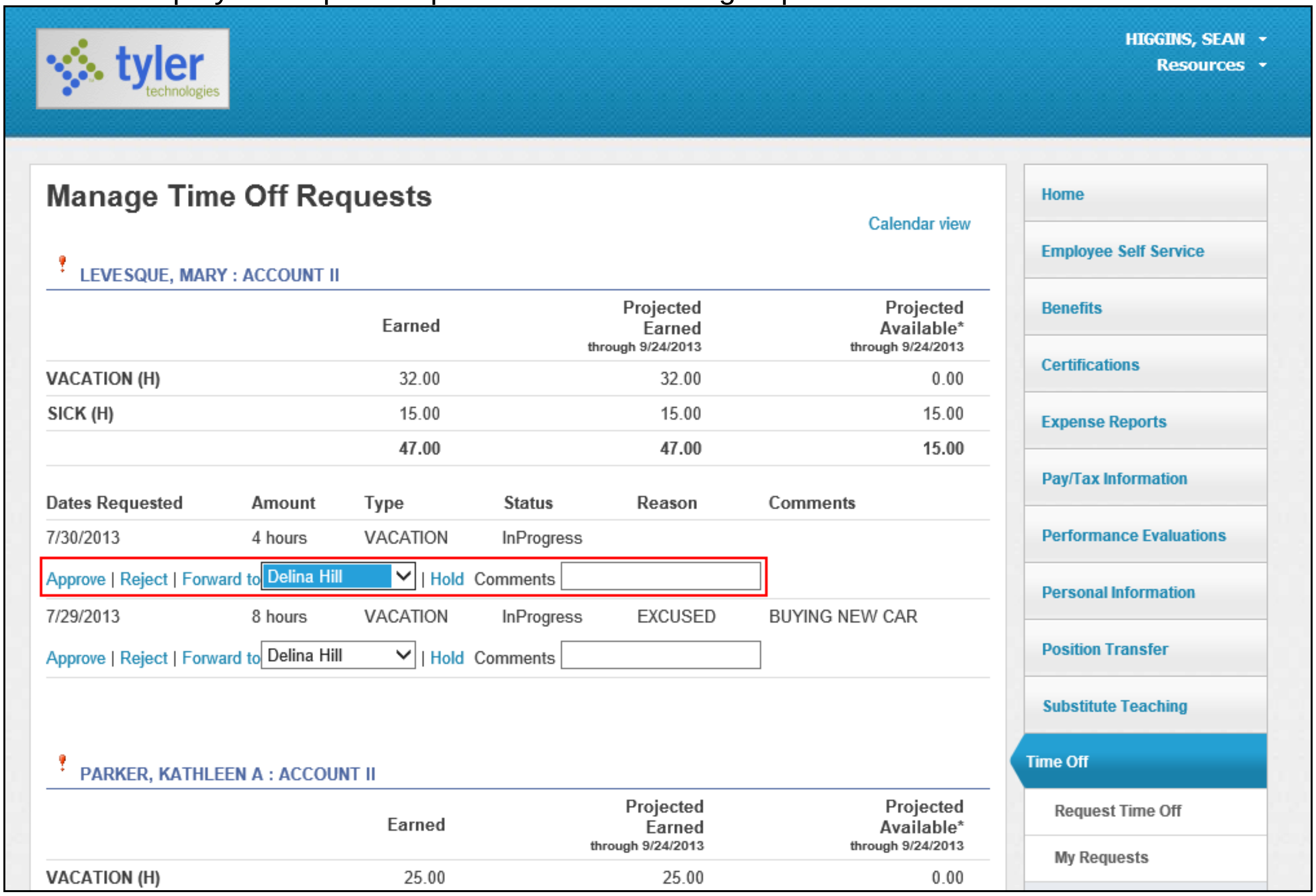


The ESA – ESS Accrual Requests process code manages the approval process for ESS accrual requests; the EST – ESS Time Sheets process code manages the approval process for ESS Time Sheet requests. Configure these processes to enable workflow functionality for ESS accrual and time entry requests.

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.

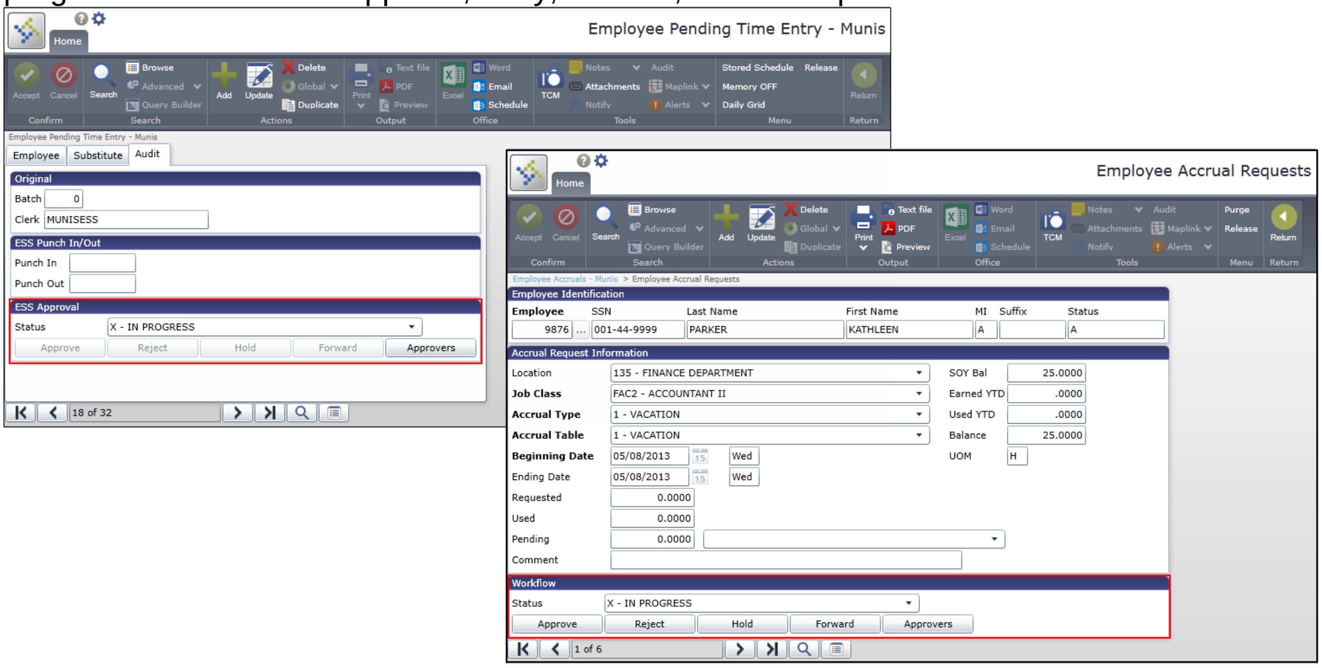


If you receive an accrual request email, click View Outstanding Requests to display the Manage Time Off Requests page. Use the Approve, Reject, Forward, and Hold options to complete the workflow process for any pending accrual requests. This page is also accessible from the Employee Requests option in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

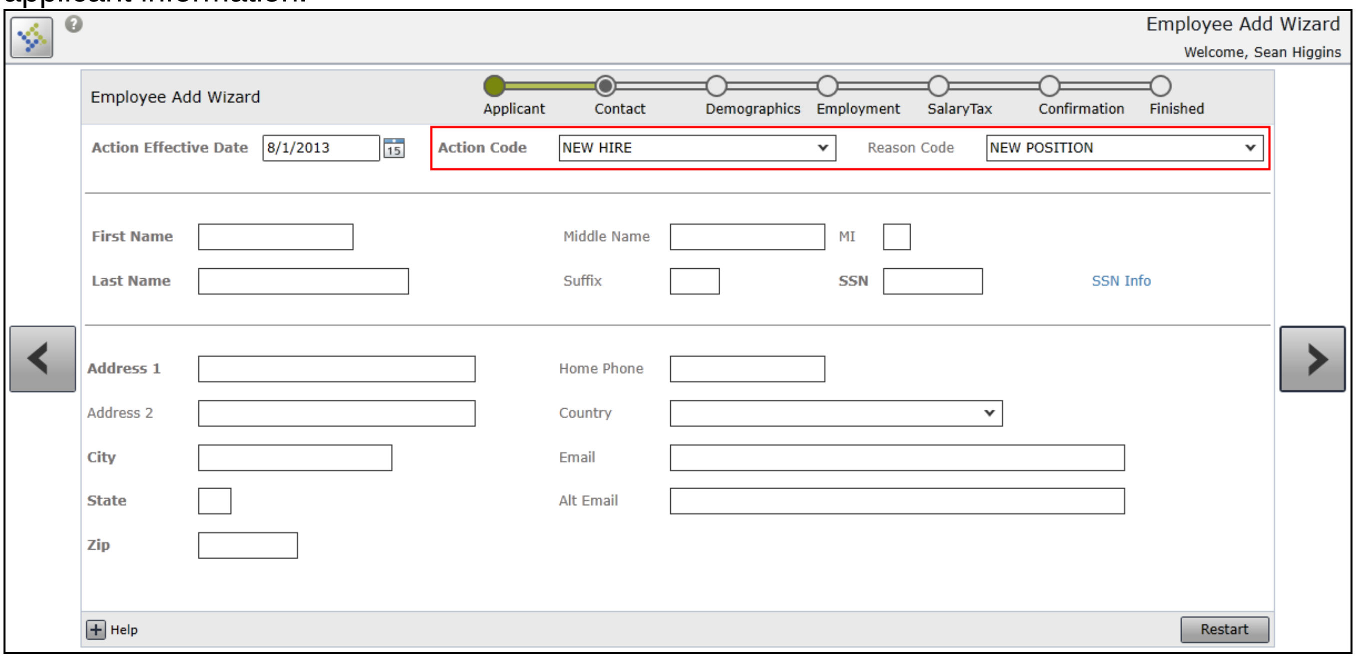
Munis Central Programs

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.

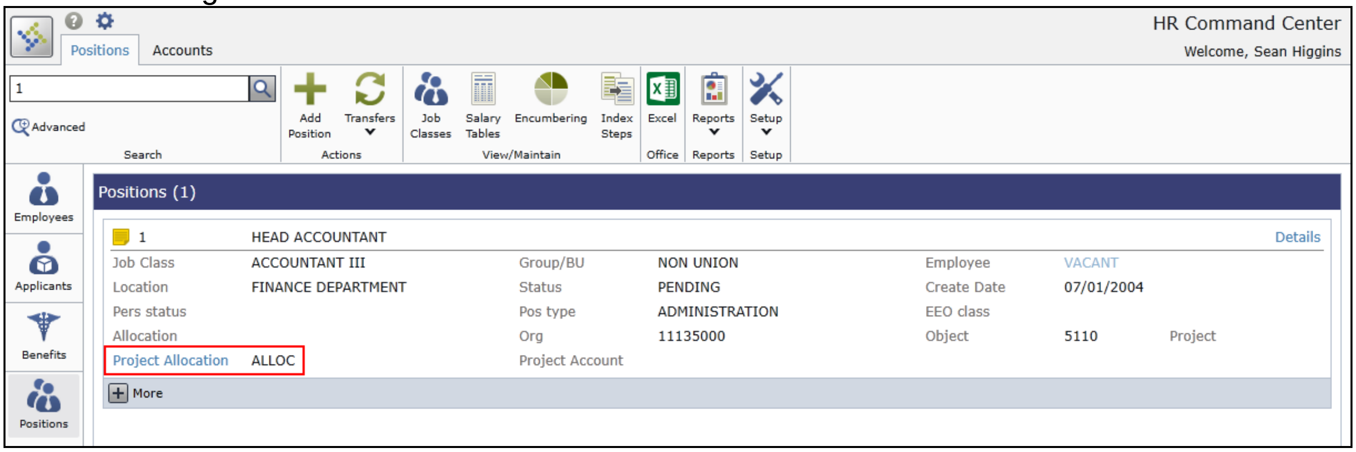


On the Contact page, the Action Code list defines an action code to be associated with the addition of the new employee. The Reason Code list indicates the reason for the action.

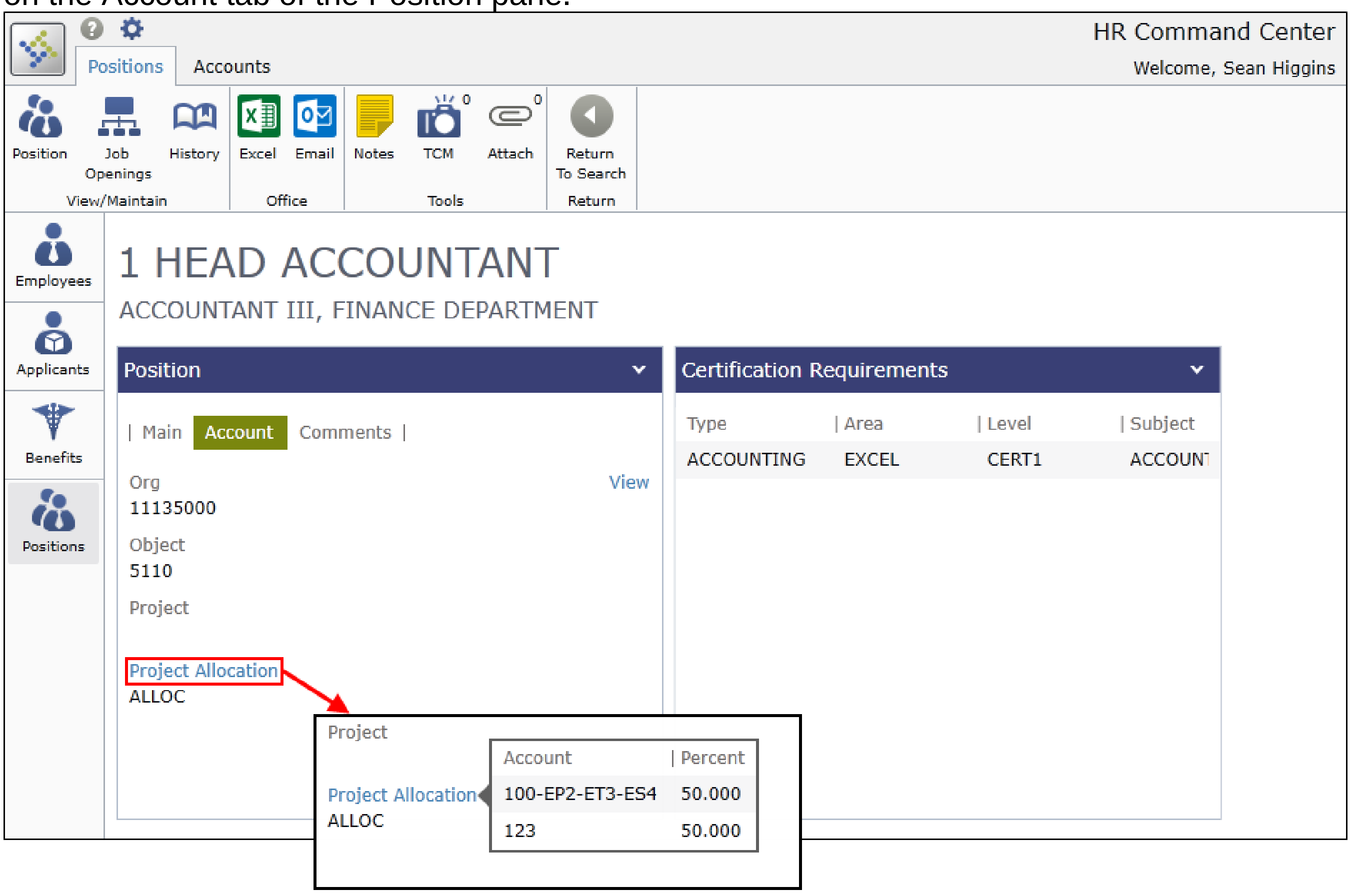
This program can be opened from the Add Employee button on the ribbon in the Employees pane or the Hire button on the Pending Applicants detail pane on the Applicants pane.

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 10.5

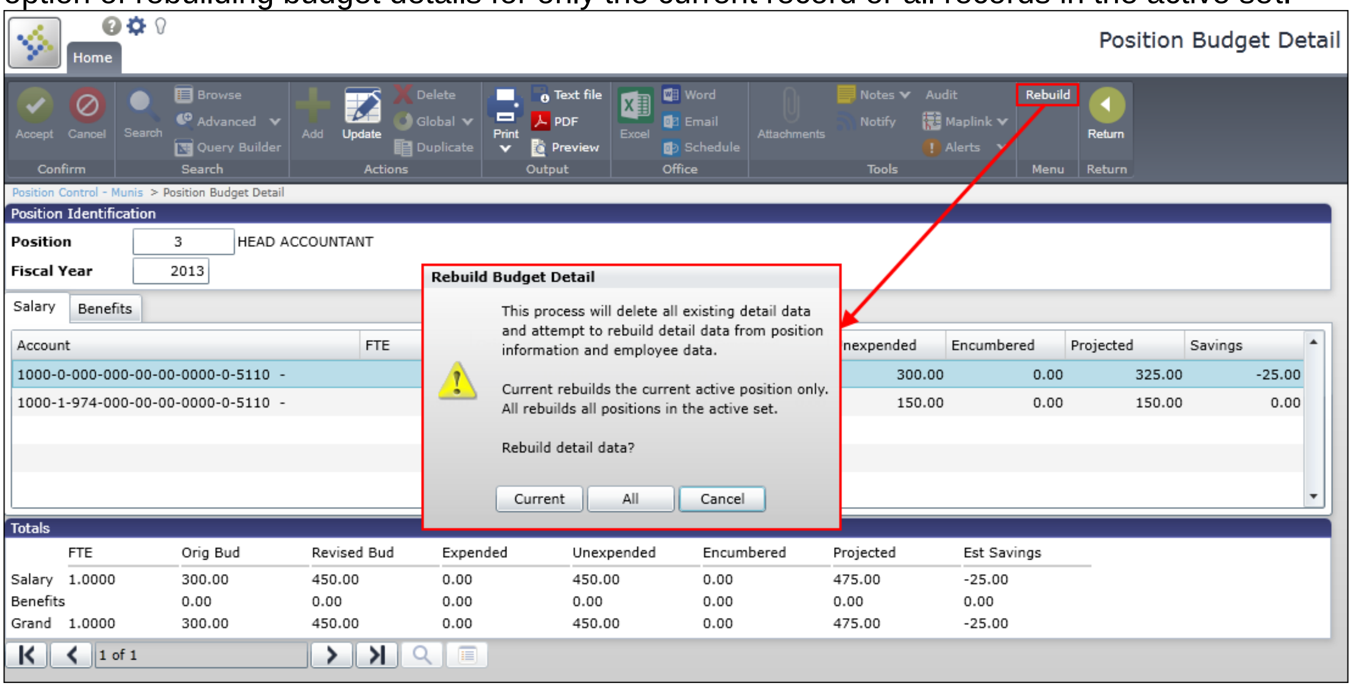
This document provides an overview of the major HR/Payroll enhancements for early adoption of Munis Version 10.5.

Human Resources 10.5

The following changes apply to Munis Human Resources programs.

Position Budget Detail Update

When you click Rebuild on the Position Budget Detail screen in the Position Control program, the program displays the Rebuild Budget Detail dialog box. This dialog box offers you the option of rebuilding budget details for only the current record or all records in the active set.



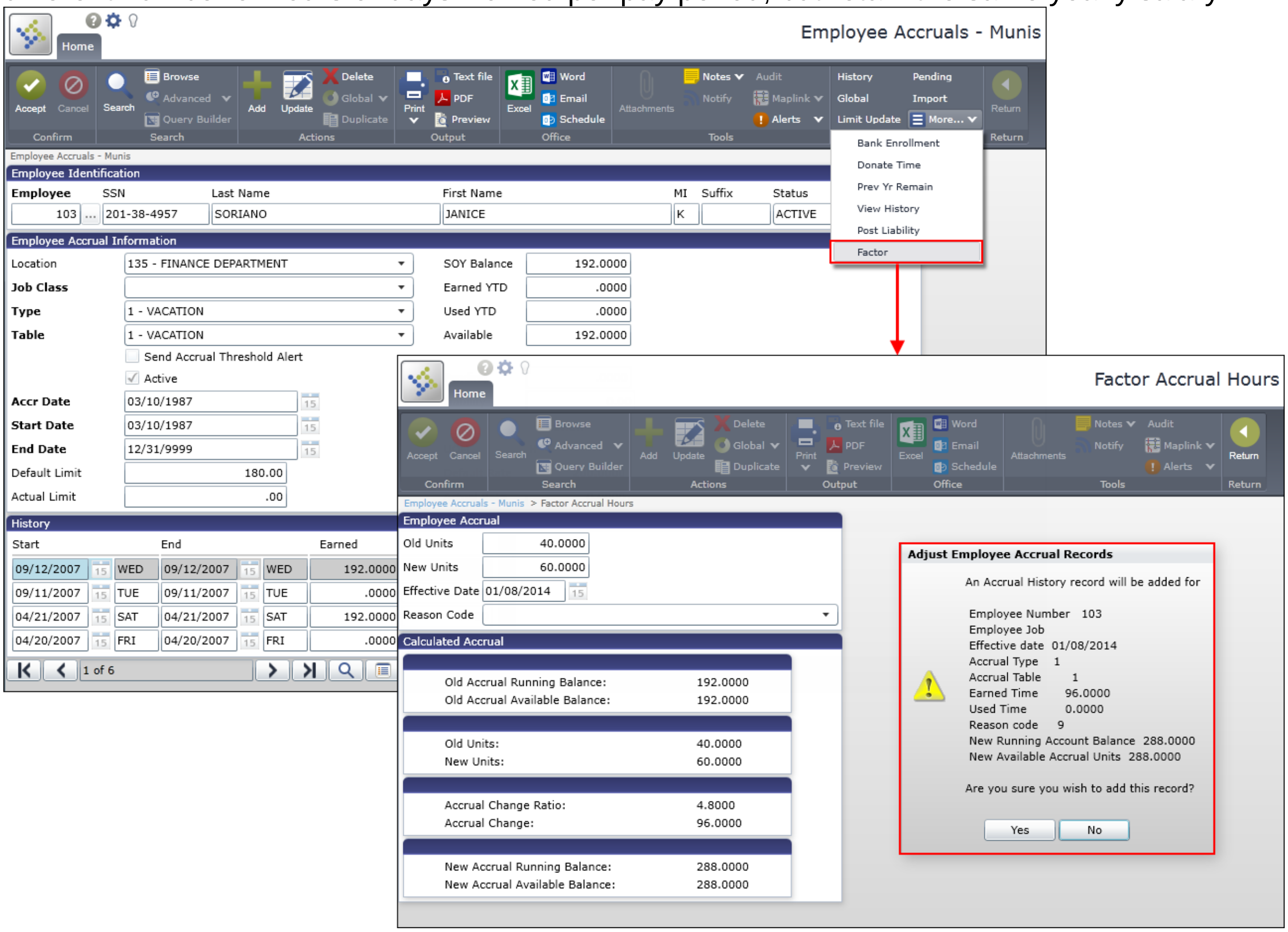
Payroll 10.5

The following changes apply to Munis Payroll programs.

Accruals

Accrual Factoring

The Factor option in the Employee Accruals program opens the Factor Accrual Hours screen, which 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.

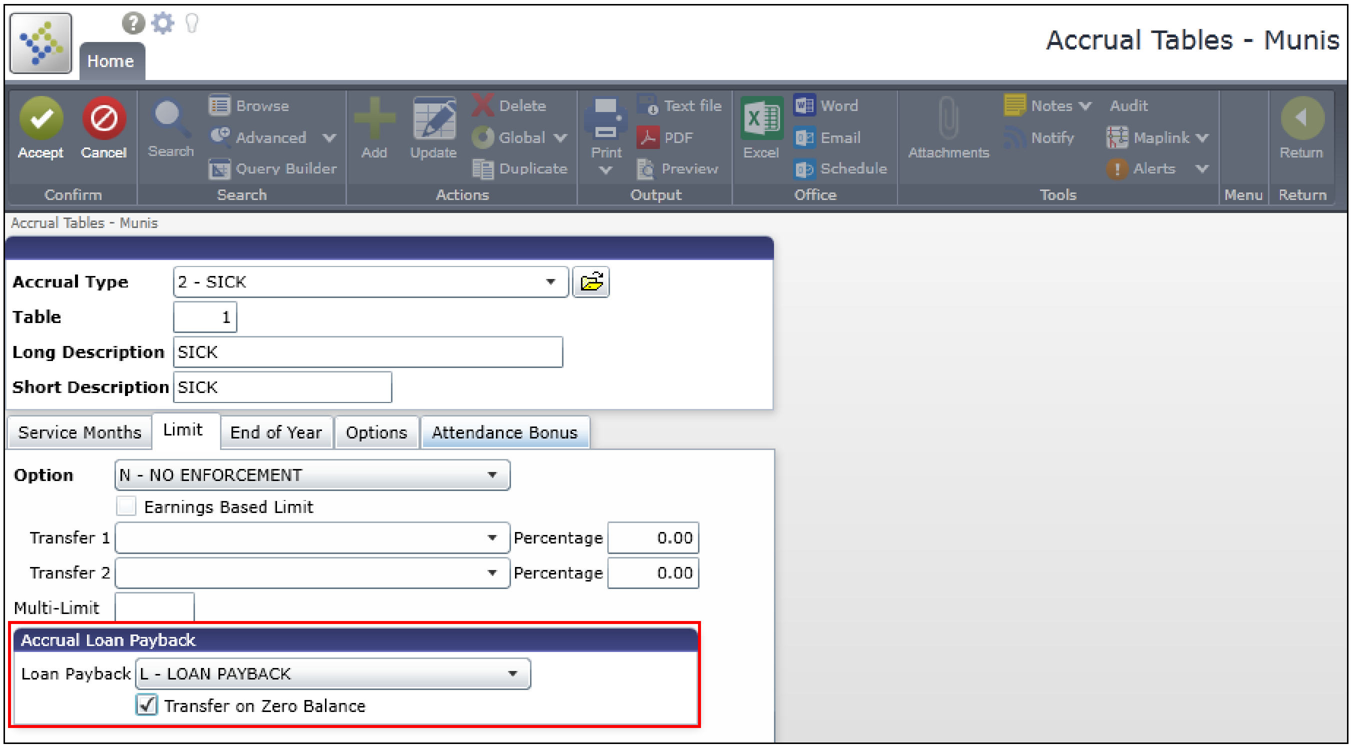


For example, if an employee moves from working 40 hours in a pay period to 60 hours in a pay period, enter 40 in the Old Units box and 60 in the New Units box. Enter the effective date and reason code for the change, as applicable. When you click Accept, the program calculates new balances for the accrual 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 programs have been updated to include 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 Accrual Loan Payback group on the Limit tab to define loan repayment options on applicable tables for the accrual type to be loaned. For example, to set up the accrual programs to loan sick time, define the fields in this group on any tables that process sick time for the employees who are receiving a loan.



The Loan Payback list identifies the loan-payback accrual type, which directs the program to check for existing loans when calculating an employee's 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.

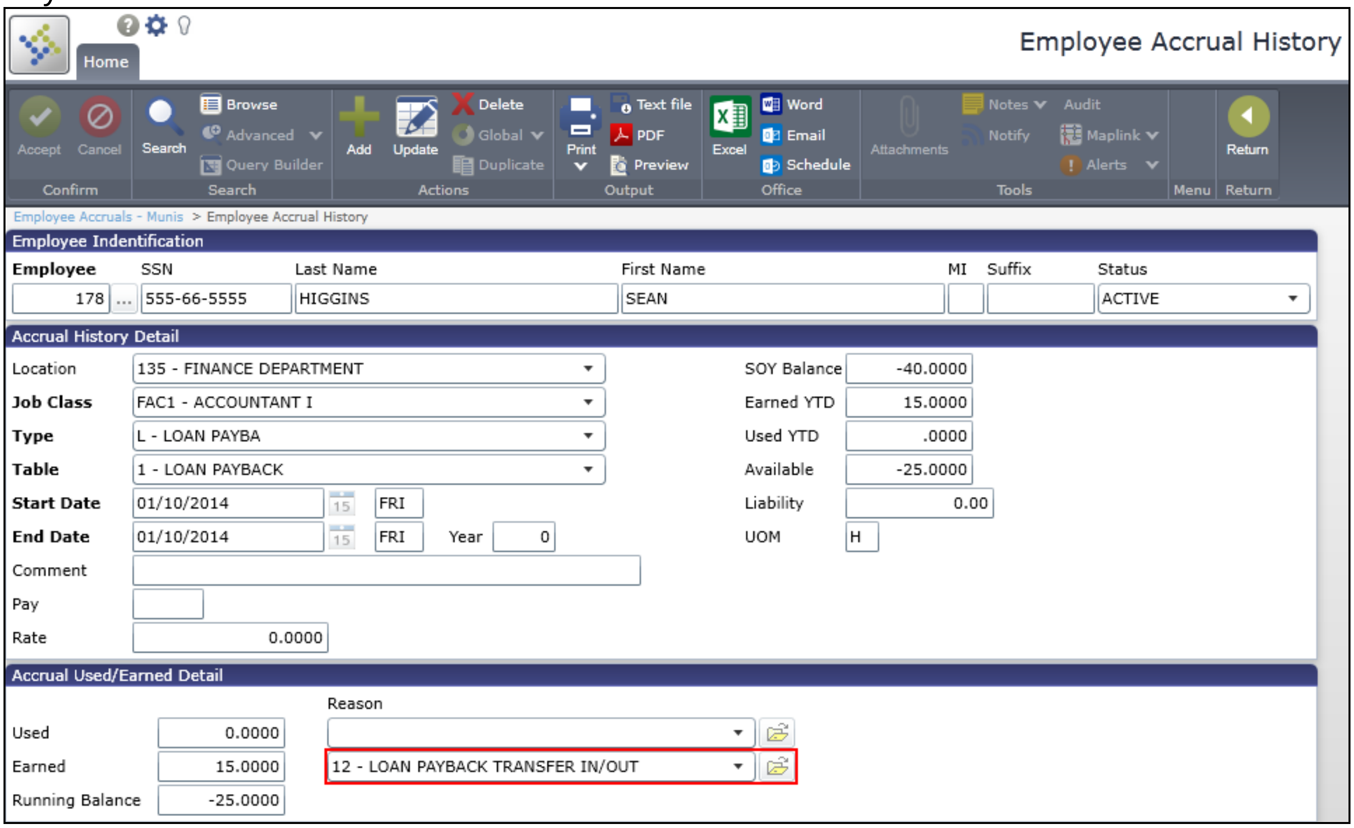
- When you select the check box, newly earned accrual time is paid toward the loan only after the employee uses all available time and has a zero balance.
- When you do not select the check box, newly earned accrual time is paid toward the loan regardless of the employee's balance.

For example, when this check box is selected:

- 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.

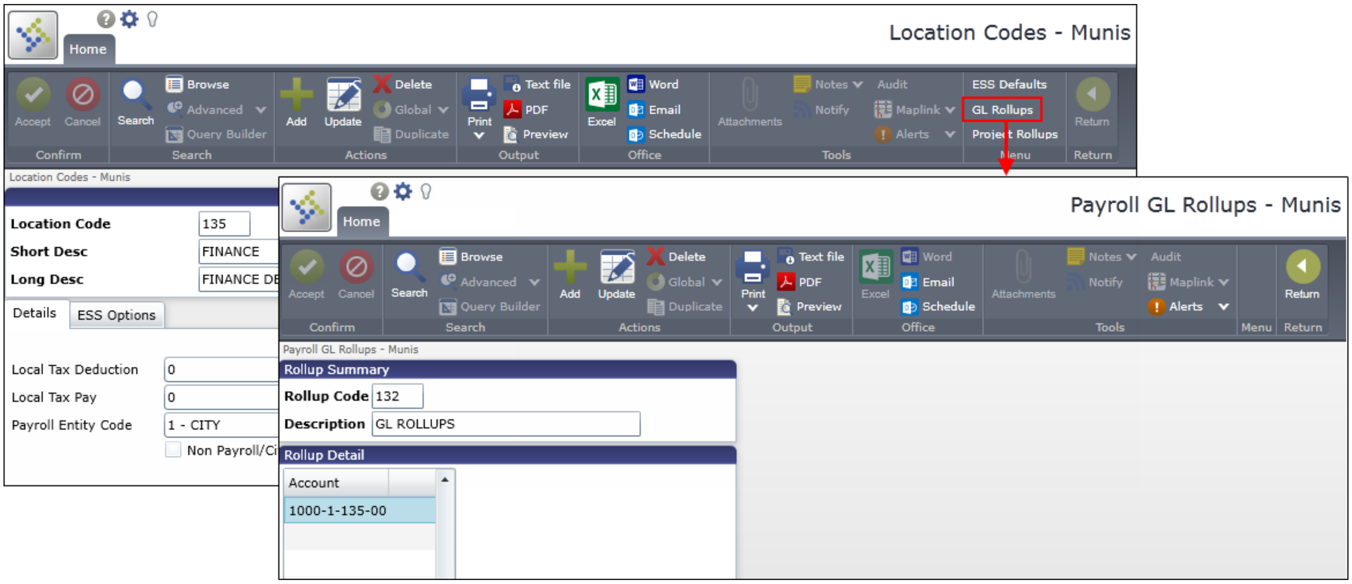
- If, during the next the payroll, the employee uses all 8 hours in the balance and then earns another 2.3 hours at the end of the payroll, these newly earned hours are applied to the loan. This is because the employee balance prior to earning those hours was zero.

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.

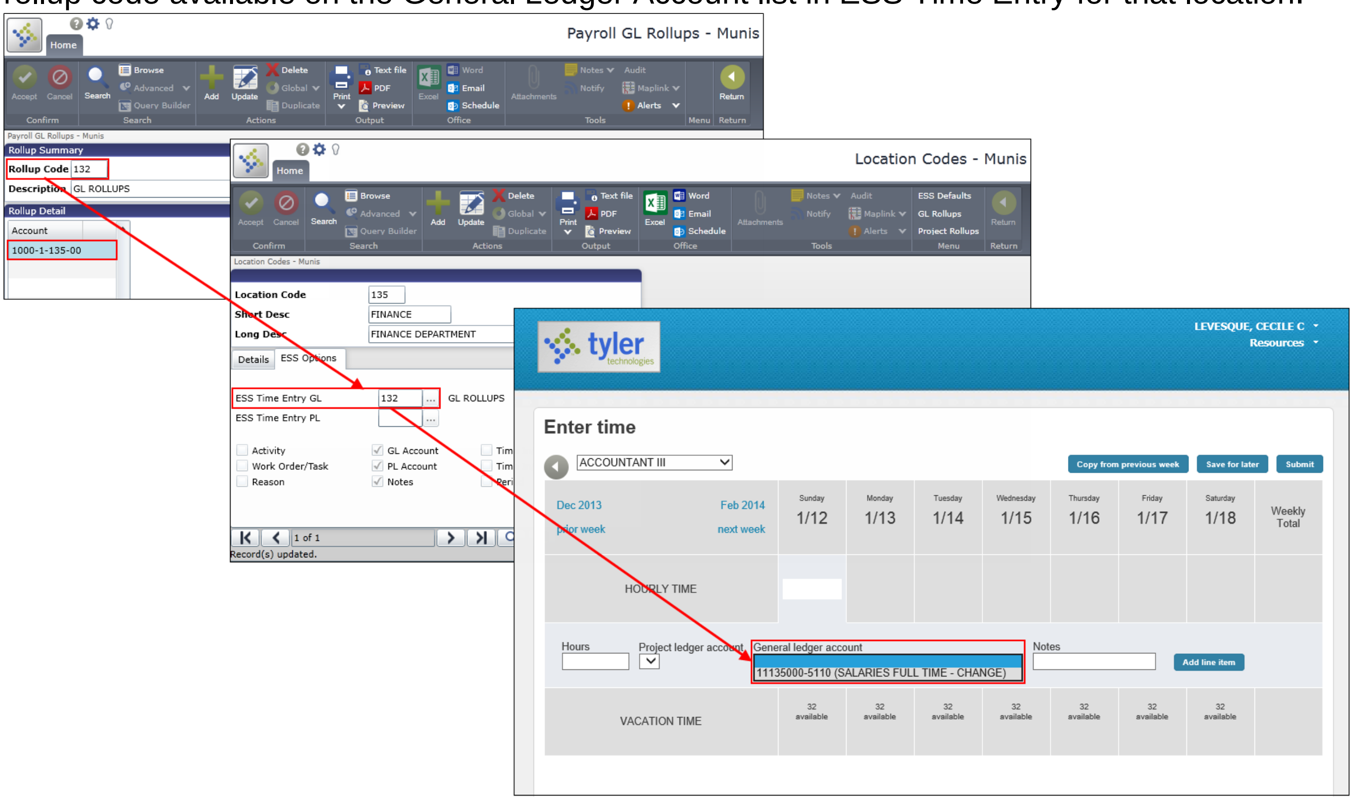


GL Rollups for ESS

The GL Rollups option in the Location Codes program opens the Payroll GL Rollups screen, where you can maintain General Ledger rollup codes, each of which specifies a group of GL accounts.

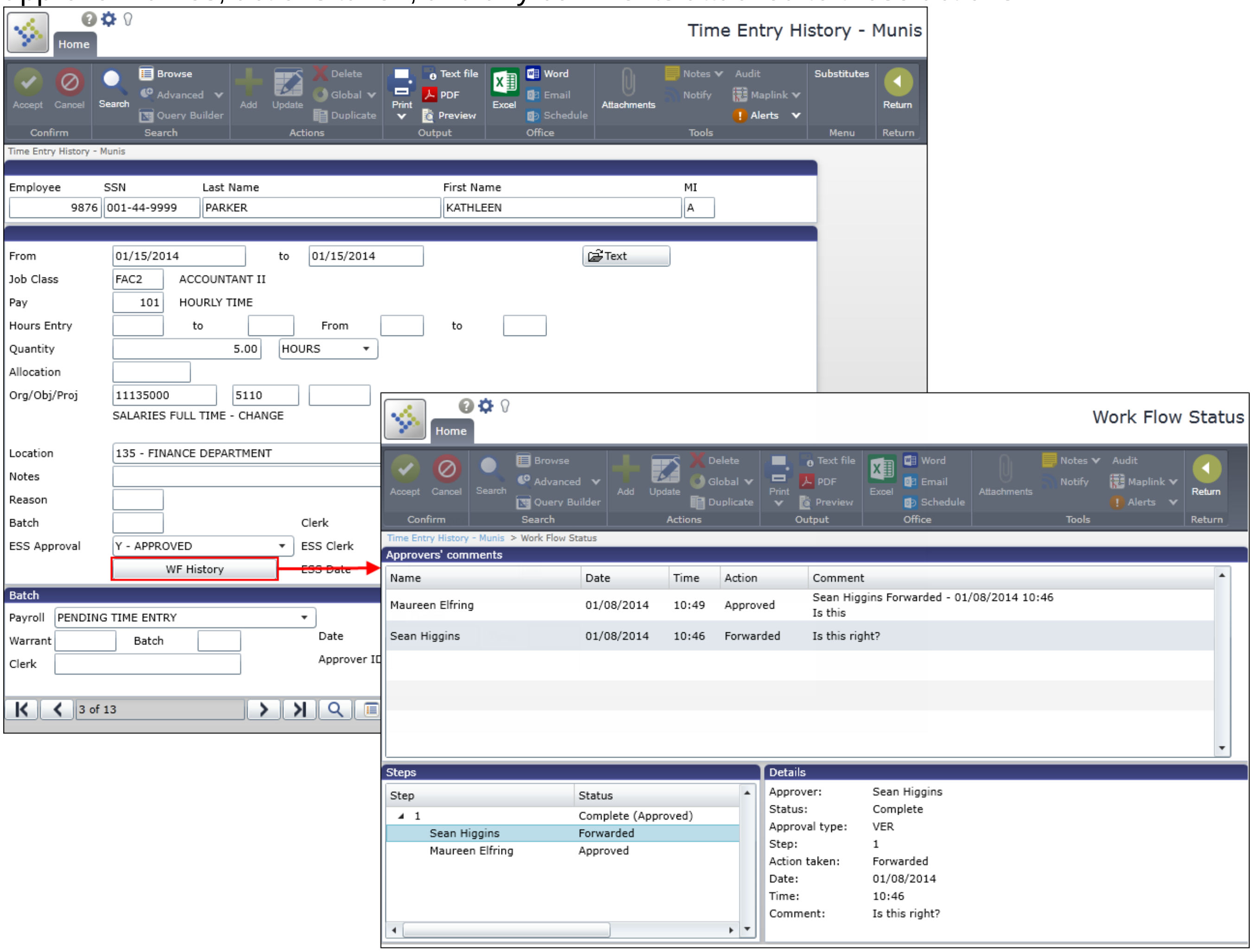


On the ESS Options tab in the Location Codes program, use the ESS Time Entry GL box to select a rollup code for the active location. The program makes the accounts specified by the rollup code available on the General Ledger Account list in ESS Time Entry for that location.



Action Record Workflow History

The WF History button is available in Employee Detail History on the Time Entry History screen, which is accessed from the Detail menu. This button displays the Work Flow Status screen, which tracks workflow history information for the active time entry record, including approver names, actions taken, and any comments attached to those actions.

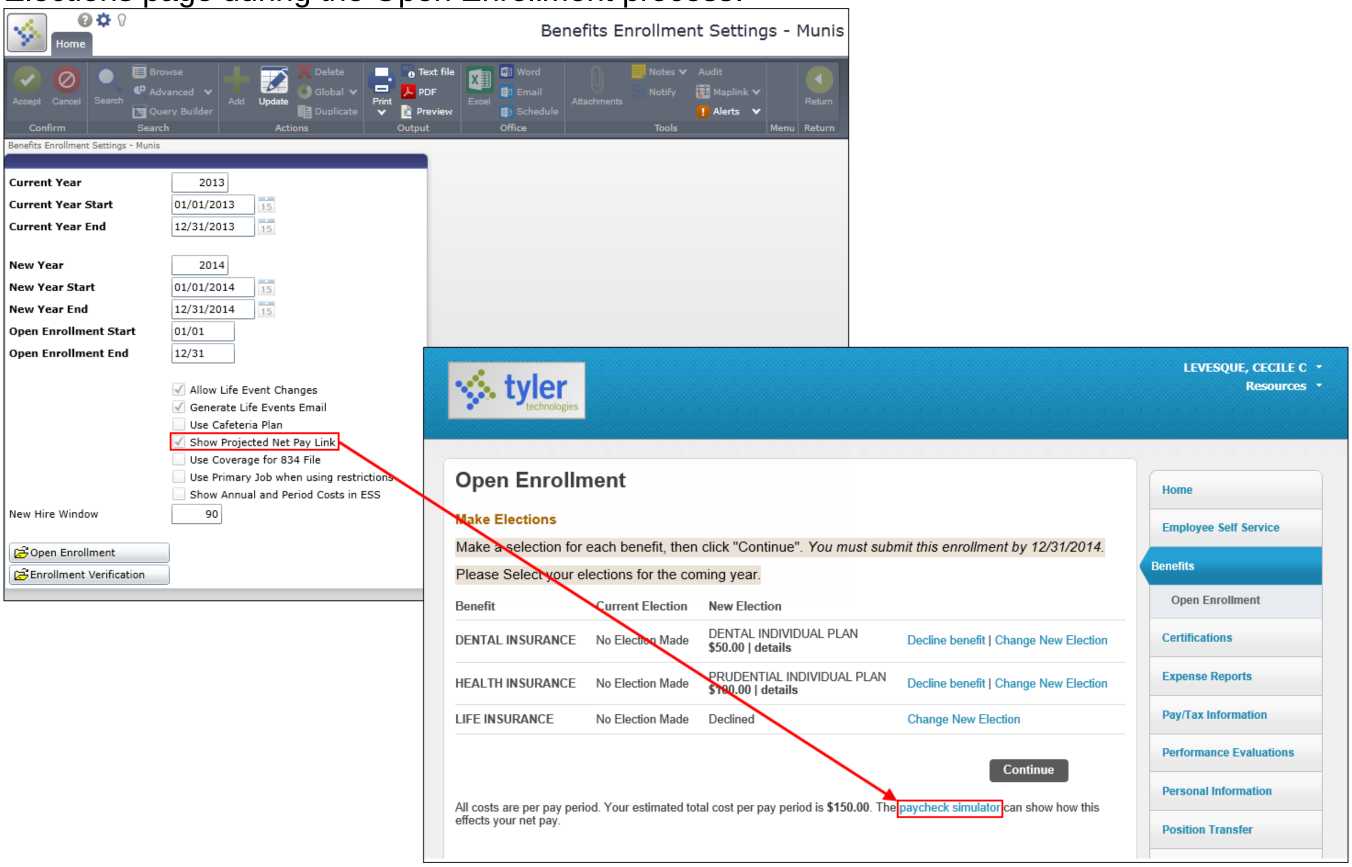


This button is active only when the current time entry record has not already been pulled into a time entry batch.

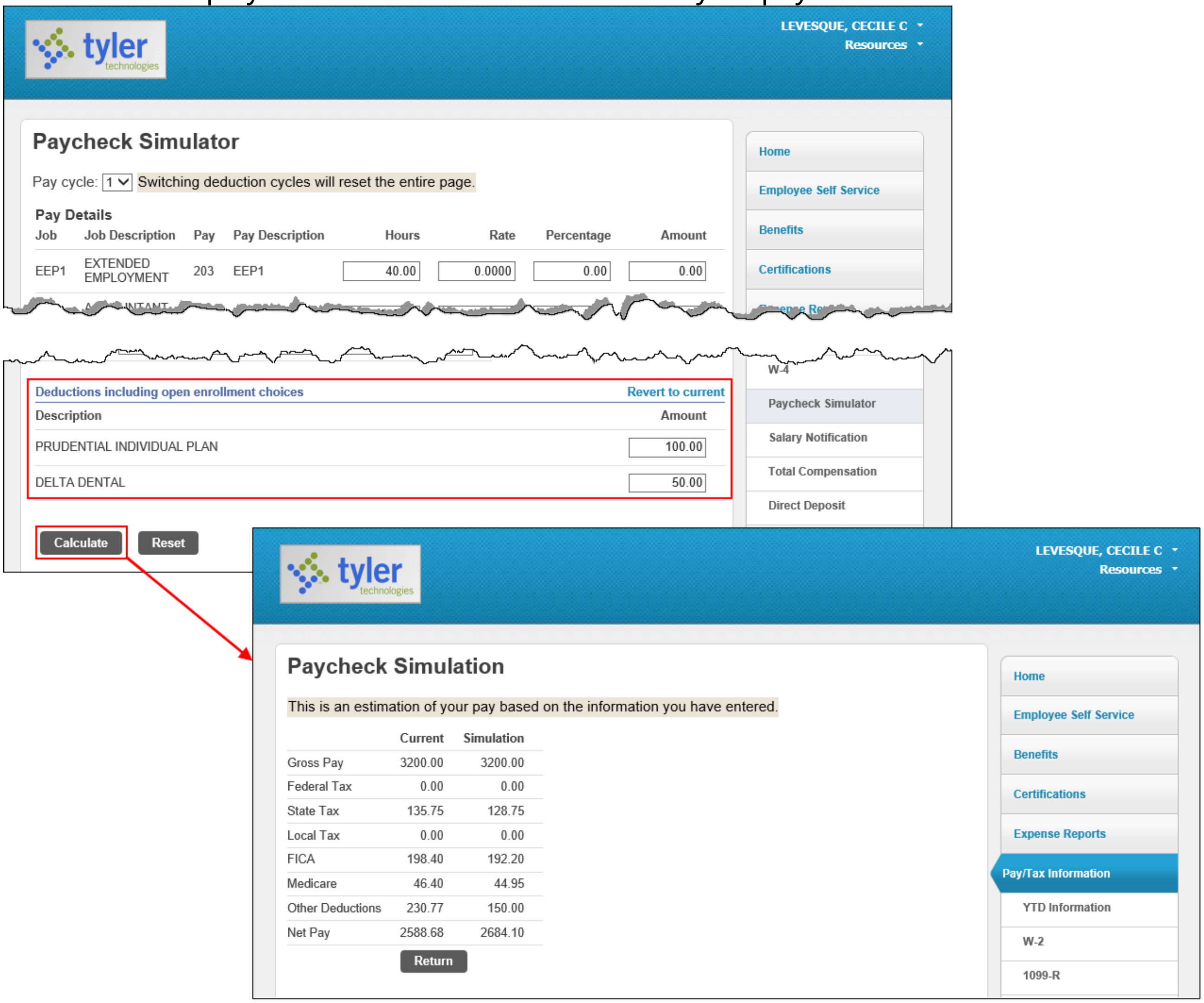
Employee Self Service

Open Enrollment Paycheck Simulator

The Benefits Enrollment Settings program includes the Show Projected New Pay Link check box. If this check box is selected, ESS displays the Paycheck Simulator link on the Make Elections page during the Open Enrollment process.



Click the Paycheck Simulator link to open the paycheck simulator with your new benefit selections entered in the Deductions Including Open Enrollment Choices boxes. Click Calculate to display the effect of those selections on your paycheck.



Munis Central Programs 10.5

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Position Central

On the details page in the Position Central program and the details page on the Positions pane in the HR Command Center, the Default Types detail pane displays the default pays, deductions, and accruals defined on the position control and job class records associated with the active position.