



Munis Human Resources and Payroll

*Major Enhancements
Version 10.4 to 10.5*

TABLE OF CONTENTS

Human Resources for Version 10.4	4
Applicant Master.....	4
Applicant Processing.....	5
Case Management Settings.....	8
Employee Emergency Contacts.....	9
Employee Evaluations.....	12
Employee Master.....	14
Mass Salary Changes.....	15
Employee Certification Options.....	16
Surveys Maintenance.....	20
 Payroll for Version 10.4	 21
403(b) Data Export.....	21
Accrual Payroll Buyout.....	22
Advice Register and Export.....	22
Employee Assignments.....	23
Employee Master.....	23
Medicare Tax for High Earners.....	25
Pay Master.....	26
Payroll Control Settings.....	27
Project String Overrides.....	28
Projection Start and Status.....	30
 Employee Self Service	 33
Benefits.....	33
Time Entry.....	34
Workflow.....	36
 System Administration - HR/Payroll Roles	 39
 Munis Central Programs	 40
HR Command Center.....	40

Munis Human Resources and Payroll 10.5	42
Human Resources 10.5	42
Position Budget Detail Update	42
Payroll 10.5.....	43
Accruals.....	43
Accrual Factoring.....	43
Accrual Loans	44
GL Rollups for ESS.....	46
Action Record Workflow History.....	47
Employee Self Service	48
Open Enrollment Paycheck Simulator	48
Munis Central Programs 10.5.....	50
Position Central.....	50

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.

Applicant Master - Munis

Home

Accept Cancel Search Advanced Add Update Delete Global Print PDF Excel Word Email TCM Notes Attachments Maplink Pending Purge Return Confirm Query Builder Duplicate Actions Output Office Tools Alerts SSN Update More... Menu Return

Applicant Master - Munis

Applicant Identification

Applicant	SSN	Last Name	First Name	Middle Name	MI	Suffix
25	829-63-6601	ALMON	HELEN			

Prior Name

Main Address Demographics Eligibility Custom Data

Applicant Requirements Information

Application Date	05/07/2007	Status	H - HIRED
Retain Until	12/31/9999	Last Updated	
Minimum Rate/Sal	.00		
Minimum Benefits			
Referral			
Related Employee			
Notes			

Application/Employment Status

Applied Previously Current Employee Former Employee

Current/Prior Position: 800427 - HELEN ALMON

Employee Information

Position	99007	SCHOOL COMMITTEE	TERMINATED
Supervisor	800422	ALEXANDER BLUE	
Job Class	S900	SCHOOL COMMITTEE	
Group/BU	9900	UNAFFILIATED	
Location	9000	CENTRAL OFFICE	

Availability

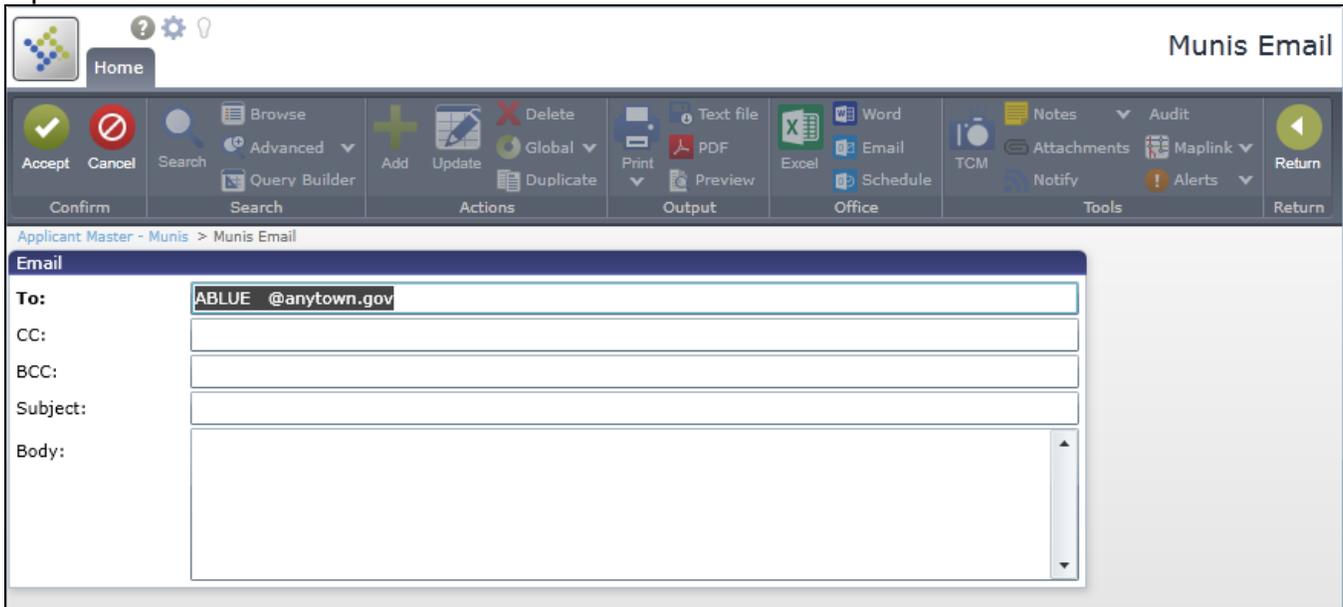
Available Start: []

Full Time Part Time Days Nights Temporary Summer

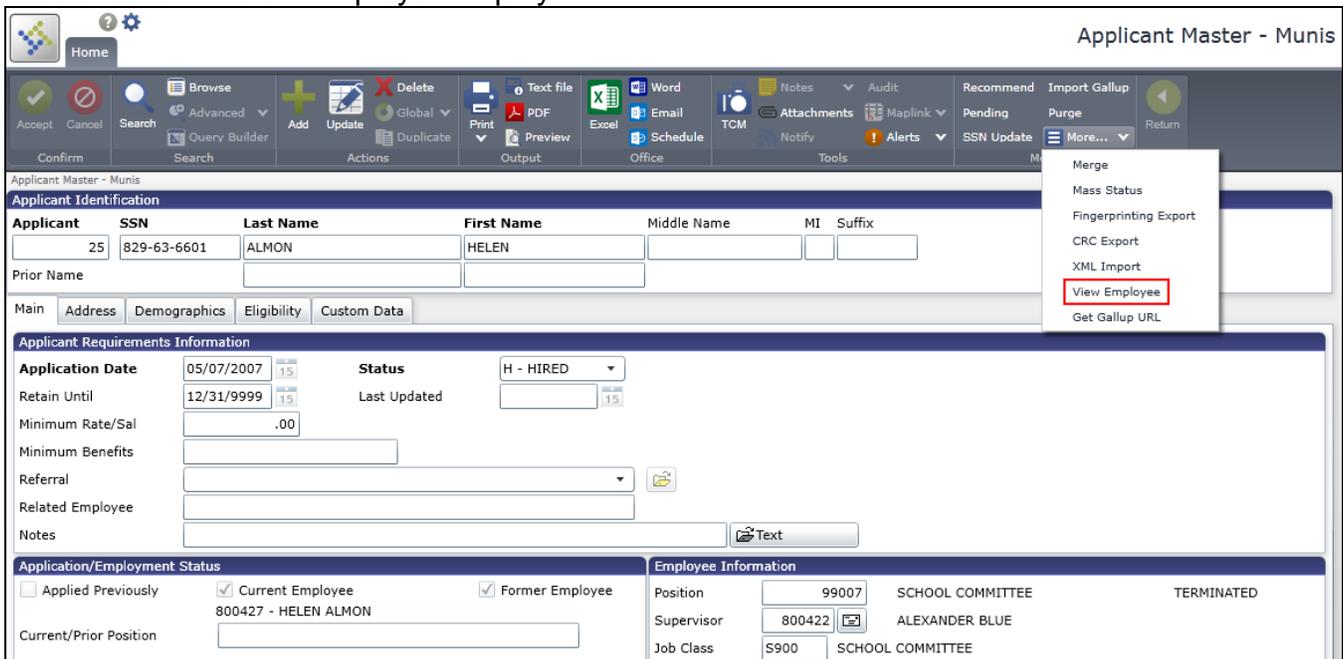
Certs/Licenses Skills Tests/Conds Education Work History Training References Ref Checks Interviews Custom Data

K < 1 of 1 >

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.

The screenshot shows the 'Applicant Processing Settings - Munis' interface. The 'Test Integration' tab is active, and 'Gallup Real-Time Integration' is selected in the 'Third Party Test Integration' dropdown menu. Other fields include 'Gallup Retention Days' (0), 'Gallup Client ID', 'Gallup Business Unit ID', 'Mobile Phone Type', 'Business Phone Type', 'Gallup Test Code', 'ECI Test Part', 'Elementary Indicator Test Part', 'Secondary Indicator Test Part', 'Insufficient Information Test Result', 'Gallup Order Request URL', and 'Time Zone'. A 'Count' field shows 0 and an 'Access Codes' list is visible at the bottom.

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 screenshot shows the 'Self Service Applications - Munis' interface. The 'Self Service Form' is set to 'ADMI' with the description 'GENERAL ADMINISTRATIVE POSITION'. The 'Use Redirect' checkbox is checked. The 'Last Compile' date is '07/20/2010' and the user is 'melfring'. A table below lists modules:

Page	Page Description	Module	Module Description
		APOS	ADMINISTRATION POSITIONS
		SCH1	HIGH SCHOOL

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.

The screenshot shows the 'Applicant Master - Munis' interface. At the top, there is a navigation bar with 'Home' and a settings icon. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'PDF', 'Preview', 'Output', 'Text file', 'Word', 'Excel', 'Email', 'Schedule', 'Office', 'Notes', 'Attachments', 'Maplink', 'Notify', 'Alerts', 'Tools', 'Recommend', 'Import Gallup', 'Pending', 'Purge', 'SSN Update', 'More...', 'Menu', and 'Return'. The main content area is titled 'Applicant Master - Munis' and contains an 'Applicant Identification' section with fields for Applicant, SSN, Last Name, First Name, Middle Name, MI, and Suffix. Below this is a tabbed interface with 'Main', 'Address', 'Demographics', 'Eligibility', and 'Custom Data'. The 'Address' tab is active, showing fields for Phone, Address, City, State, Zip, Country, County, Email, Alt Email, Reference, Gallup Code, Gallup Date, Gallup URL, and Gallup URL Date. A red rectangular box highlights the Gallup Code, Gallup Date, Gallup URL, and Gallup URL Date fields. At the bottom of the Address tab, there are buttons for 'Addresses' and 'Phones'.

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.

Applicant Tests and Conditions

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Notes Attachments Audit Mass-Notes Import Scores Return

Confirm Search Query Builder Actions Output Office Tools Alerts Menu Return

Applicant Master - Munis > Applicant Tests and Conditions

Applicant Identification

Applicant	SSN	Last Name	First Name	MI	Suffix
1	000-00-0001	SMITH	JOE		

Main Gallup

Gallup Information

Gallup Code

Attempt Number

Test Profile

Results URL

Credits

Type	Credit
Total Credits	0.00

Test Parts

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.

Case Management Settings - Munis

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print PDF Excel Word Notes Attachments Audit Restrictions Return

Confirm Search Query Builder Actions Output Office Tools Alerts Menu Return

Case Management Settings - Munis

General Security

User ID	User Name	View Resolution	Update Status	View SSN	View All Categories	Inquiry Only	Edit All Stages	Restrictions
melfring	Maureen Elfring	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
munis	Munis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sean.higgins	Sean Higgins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

Employee Case Management - Munis

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print Text file PDF Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Process View History Stages Emp Inquiry Return

Employee Case Management - Munis

Case Management

Case: 1522 Date: 07/22/2013 Type: SUBS - SUBSTANCE ABUSE

Category: OTHR - OTHER ACTIONS

Linked case: 0 OSHA case: 0 Primary HR contact: 64 (BEDIENT, TIM J) Secondary HR contact:

Status: 1 - STARTED

Case Notes

Main Issue Resolution

Employee Identification

Employee: 155366 SSN: 001-55-3636 Last Name: PRALINI

Employee Information

Job Class: S200 TEACHER ENGLISH Location: 9100 HIGH SCHOOL Group/BU: 9200 TEACHERS Supervisor: 0

Process

Stage	Description	Start
WARN	VERBAL WARNING	
WRT1	FIRST WRITTEN WARNING	
WRT2	SECOND WRITTEN WARNING	
TERM	TERMINATION	

Employee Case Management Stage Details

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print Text file PDF Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Process View History Stages Emp Inquiry Return

Employee Case Management - Munis > Employee Case Management Stage Details

Stage Information

Case: 1522 Process Stage: WARN VERBAL WARNING

Employee Case Management Stage Details

Home

Accept Cancel Search Browse Advanced Add Update Delete Global Print Text file PDF Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Process View History Stages Emp Inquiry Return

Employee Case Management - Munis > Employee Case Management Stage Details

Stage Information

Case: 1522 Process Stage: WRT2 SECOND WRITTEN WARNING

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.

Employee Emergency Contacts - Munis

Employee	SSN	Last Name	First Name	MI	Suffix	Status
166355 ...	001-11-1122	LEVESQUE	CECILE			ACTIVE

Name		HAROLD LEVESQUE	
Relationship	O - OTHER		
Line 1	12 ELM STREET		
Line 2			
City	PORTLAND		
State	ME	Zip	04103 ...
Phone	222-222-2222		
Comment			

Additional Telephone Numbers			
Type	Phone	Comment	Unlisted
OFF - OFFICE	333-333-3333		<input checked="" type="checkbox"/> Unlisted
HOME - HOME PHONE MIGRATION	555-5555	CALL ONLY IF OTHERS BUSY	<input type="checkbox"/> Unlisted

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.

The screenshot displays the Tyler Technologies ESS interface. The top navigation bar shows the user's name, LEVESQUE, CECILE C, and a Resources dropdown. The main content area is divided into two sections: 'Personal Information' and 'Emergency Contacts'.

Personal Information Section:

- Employee Preferred Name:** CECI (change)
- Address / E-mail:** 372 ROUTE 1, MONTREAL, QC (change)
- E-mail:** sean.higgins@ty
- Options:** change
- W-2 Delivery Method:** Mail and email
- Telephone:**

Type	Description	Number
PRIMARY	HOME PHONE	123
WORK PHONE NUMBER		111
- Dependents:** No Dependent information to display.

Emergency Contacts Section:

Name	Relationship	Phone	Comments	Change	Delete
HAROLD LEVESQUE	OTHER	222-222-2222		Change	Delete

Edit Emergency Contact Form:

- Name:** HAROLD LEVESQUE
- Relationship:** OTHER
- Primary Telephone Number:** 222-222-2222
- Address:** 12 ELM STREET
- Address 2:**
- City:** PORTLAND
- State:** ME
- Zip Code:** 04103
- Comments:**
- Buttons:** Update, Cancel
- Additional Phone Numbers Table:**

Number	Type	Comment	Unlisted	Delete
333-333-3333	OFFICE		Y	Delete
555-5555	HOME PHONE MIGRATION	CALL ONLY IF OTHERS BUSY	N	Delete
- Form Action:** Add a phone number

A red box highlights the address fields in the form, and a red arrow points from the 'Change' button in the 'Emergency Contacts' table to the form.

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.

The screenshot displays the 'Evaluation Template - Munis' interface. The top toolbar includes options like 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Delete', 'Global', 'Print', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'TCM', 'Attachments', 'Notify', 'Alerts', and 'Return'. The main area is divided into three sections:

- Evaluation Template:** Fields for Code (S001), Short Description (SUPER01), and Long Description (SUPERVISOR TEMPLATE 01). There are also checkboxes for 'Add/Remove Competencies' and 'Add/Remove Events'.
- Header Sections:** A table with columns for Name, Enable, ESS Display, and Instruction Text.

Name	Enable	ESS Display	Instruction Text
Basic Information	<input checked="" type="checkbox"/>		Please fill out all fields in this section.
Text Data	<input type="checkbox"/>	Evaluation Criteria Used	
Events	<input checked="" type="checkbox"/>		
Recommendation	<input checked="" type="checkbox"/>		
Competencies	<input type="checkbox"/>		
- Fields:** A table with columns for Name, Enable, and Required.

Name	Enable	Required
Completion Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Review Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
360 Evaluation Type	<input type="checkbox"/>	<input type="checkbox"/>
Review Period Begin	<input type="checkbox"/>	<input type="checkbox"/>
Review Period End	<input type="checkbox"/>	<input type="checkbox"/>
Scheduled Date	<input type="checkbox"/>	<input type="checkbox"/>
Needed Score	<input type="checkbox"/>	<input type="checkbox"/>

The preview on the right shows the 'tyler technologies' logo and user 'HIGGBS, SEAN'. The form fields are: Employee (LEVESQUE, MARY), Job (ACCOUNTANT II), and a 'Basic Information' section with 'Please fill out all fields in this section.' Below this are 'Completion Date*', 'Rating*' (EXCELLENT), and 'Review Type' (ANNUAL EVALUATION). The 'Evaluation Criteria' section contains 'Overall Text*'. A sidebar on the right lists navigation options: Home, Employee Self Service, Benefits, Certifications, Expense Reports, Pay/Tax Information, Performance Evaluations (selected), Employee Evaluations, Personal Information, Position Transfer, Substitute Teaching, and Time Off.

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.

Evaluation 360 Sources - Munis

Home

Accept Cancel Search Advanced Query Builder Add Update Duplicate Delete Global Print PDF Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Menu Return

Evaluation 360 Sources - Munis

360 Source

360 Type: 1 - Supervisor Evaluation

Code: S001

Short Description: S EVAL 01

Long Description: SUPERVISOR EVALUATION 01

ESS Template: S001 - SUPERVISOR TEMPLATE 01

Default Competencies

Competer	Description	Weight
1	PUNCTUALITY	20.00

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.

The screenshot shows the 'Employee Master - Munis' interface. At the top, there is a navigation bar with 'Home' and a settings icon. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'Text file', 'Word', 'Excel', 'Email', 'Schedule', 'Office', 'Notes', 'Attachments', 'Maplink', 'Alerts', 'Tools', 'Detail', 'Org Chart', 'Supervisor', 'Return', 'Terminate', 'Reporting Emps', and 'More...'. The main content area is titled 'Employee Master - Munis' and contains an 'Employee Identification' table. The table has columns for Employee, SSN, Last Name, First Name, Middle Name, MI, Suffix, and Status. The first row shows Employee 166355, SSN 001-11-1122, Last Name LEVESQUE, First Name CECILE, and Status A - ACTIVE. A red box highlights the 'Preferred Name' field with the value 'CECI'. Below the table is a 'Main' menu with tabs for Dates, Demographics, Address, Payroll, Mail Sort, Last Change, and Benefit FTEs. The 'Employee Information' section is expanded, showing fields for Job Class (FAC3 ACCOUNTANT III), Location (135 FINANCE DEPARTMENT), Group/BU (10 NON UNION), Pay Frequency (B - BIWEEKLY), Project Account, Org/Obj/Proj (11135000 5110 SALARIES FULL TIME - CHANGE), and Department (135 FINANCE DEPARTMENT).

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

The screenshot shows the Tyler Technologies ESS interface. The top navigation bar includes the Tyler Technologies logo and the user name 'LEVESQUE, CECILE C' with a dropdown arrow, and 'Resources' with a dropdown arrow. The main content area is titled 'Personal Information' and contains several sections: 'Employee Preferred Name' with a 'change' link and a red arrow pointing to the 'Preferred Name' field containing 'CECI'; 'Address / E-mail' with a 'change' link; 'Home Address' (372 ROUTE 1, MONTREAL, QC B5B 6A8); 'E-mail' (sean.higgins@tylertech.com); 'Alternate E-mail'; 'Options' with a 'change' link; and 'W-2 Delivery Method' (Mail and email). A modal dialog box titled 'Edit Preferred Name' is open, showing the 'Employee Preferred Name' field with 'CECI' and 'Update' and 'Cancel' buttons. At the bottom right, there are links for 'Performance Evaluations' and 'Personal Information'.

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 screenshot displays the 'Mass Contract Changes - Munis' application. The top navigation bar includes 'Home' and various tool icons. The main form is divided into several sections:

- Search/Filter Section:** Fields for Location, Org, Group/BU, Job Class, Position, Pay Type, Calendar, and Next Date. The 'Calendar' and 'Next Date' fields are highlighted with a red box.
- Criteria Section:** Fields for 'Started Job Before' (07/18/2013), 'Minimum Days Worked' (0 in Year, 2006 by Job Class), and 'Minimum Hours Worked' (500). The 'Minimum Hours Worked' field and its sub-fields are highlighted with a red box.
- Options Section:** A 'Retirees' tab is active. Fields include 'Change Option', 'Percentage Rate' (.000), 'Plus Amount' (.00), and 'Effective Date'. The 'Report Sort Order' is set to '1 - EMPLOYEE NUMBER' and is highlighted with a red box. Below this are several checkboxes: 'Salary Table Defaults', 'Active Employees Only', 'Include Off-Step/Frozen Employees' (checked), 'Update Frozen Employee Salary', 'Allow Salary Decrease', 'Allow Salary to Exceed Maximum', and 'Increase Salary to Minimum'. The last two checkboxes are highlighted with a red box.
- PM Action Code:** A dropdown field at the bottom.

- 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.

The screenshot shows the 'Pay Band Increases - Munis' application window. The interface includes a top navigation bar with 'Home' and various tool icons. The main area contains a form for configuring a pay band increase process. Key fields include:

- Execute this process:** A dropdown menu.
- Location, Org, Group/BU, Job Class, Position, Pay Type, Calendar, Next Date:** Fields with 'to' indicators and dropdown menus.
- Started Job Before:** A date field set to 07/17/2013.
- Minimum Days Worked:** A field set to 0, with a note 'in Year 2011 by Job Class'.
- Minimum Hours Worked:** A field set to 0.
- Increase Effective Date:** A date field.
- Increase Type:** A dropdown menu set to 'Percent of pay band mid salary'.
- Increase Percent:** A field set to 0.00.
- Rounding Method:** A dropdown menu with a red border, showing options: NONE, ROUND, ROUND UP, ROUND DOWN, and ROUND TO NEAREST CENT.
- Review Period, Anniversary Range, Anniversary Option:** Fields with dropdown menus.
- Lump Sum Pay Type:** A dropdown menu.
- Pay Start and End Date:** A date field set to 12/15/2011.
- Report Sort Order:** A dropdown menu set to '1 - EMPLOYEE NAME'.
- Options:** A list of checkboxes: 'Active Employees Only', 'Allow Salary to Exceed Maximum', 'Increase Salary to Minimum', and 'Generate Action'.
- Action Code:** A dropdown menu at the bottom.

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.

Employee Certification Import

File Type

- Certification Data
- Test Data

Import Parameters

Import File: import_prempecr.002

Import File Path: d:\home\sean.higgins\V10.4_FO\import

Form: IMPORT - import

Delimiter: |

Verified

Use Form Column 1

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.

	A	B	C	D	E	F	G
1	456-89-7902	1CPA	9/1/2011	127203	EDU		1
2							

Form Definitions - Munis

Form information

Process: prempcer

Name: IMPORT

Type: User Modified

Additional form information

Description: import

Number of lines: 1

Test program ID: prempcer

Master form information

Process: prempcer

Name: EMPCERT

View Potential Form Issues

Fld	Type	Field Name / Text	Sz	Ln	Col	Ln	Col	Ln	Col	Ln	Col
1	Alpha	SSN	11	1	1	0	0	0	0	0	0
2	Alpha	Cert Type	4	1	5	0	0	0	0	0	0
3	Alpha	Cert Area	4	1	2	0	0	0	0	0	0
4	Text	Cert Number	20	1	4	0	0	0	0	0	0
5	Date	Effective Date	10	1	3	0	0	0	0	0	0
6	Alpha	Cert Level	4	1	6	0	0	0	0	0	0
7	Text		0	0	0	0	0	0	0	0	0

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.

Personnel Settings - Munis

Home

Accept Cancel Search Advanced Query Builder Confirm Search

Add Update Duplicate Actions

Delete Global Print PDF Preview Output

Text file Word Excel Word Email Schedule Office

Notes Attachments Notify Alerts Tools

Audit Maplink Menu Return

Personnel Settings - Munis

Settings Position Control Training Evaluations

Position Control Update Y - YES

- Print Employee Position Overbudget Report
- Update From Job/Salary
- Position Change/Request
- Use Position Number in Supervisor Field
- Show Leading Zeros
- Disallow use of Inactive Positions
- Use Budget by FTE Vacancy Calc
- Require Only One Certification**

Length of Position Number 4

Hiring Freeze in Employee Job/Salary ALLOW POSITIONS

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.

Job Class Certification Requirements

Home

Accept Cancel Search Advanced Query Builder Confirm Search

Add Update Duplicate Actions

Delete Global Print PDF Preview Output

Text file Word Excel Word Email Schedule Office

Notes Attachments Notify Alerts Tools

Audit Maplink Menu Return

Job Class Master - Munis > Job Class Certification Requirements

Type	Area	Level	Subject	Required	Weight
ACT - ACCOUNTING	EX - MICROSOFT EXCEL	001 - FIRST LEVEL CERTIFICATION	ACC - ACCOUNTING	<input type="checkbox"/>	0.0000

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.

The screenshot shows the 'Position Control Central' interface. At the top right, it says 'Position Control Central' and 'Welcome, Sean Higgins'. Below the header is a navigation bar with icons for Position, Job Openings, History, Excel, Email, Notes, and Return To Search. The main content area displays '1 HEAD ACCOUNTANT' and 'ACCOUNTANT III, FINANCE DEPARTMENT'. There are two dropdown menus: 'Position' and 'Certification Requirements'. The 'Certification Requirements' dropdown is expanded, showing a table with columns: Type, Area, Level, and Subject. The 'Subject' column has the value 'ACCOUNTING' highlighted with a red box.

Type	Area	Level	Subject
ACCOL	MICROSOFT EXCEL	FIRST LEVEL	ACCOUNTING

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.

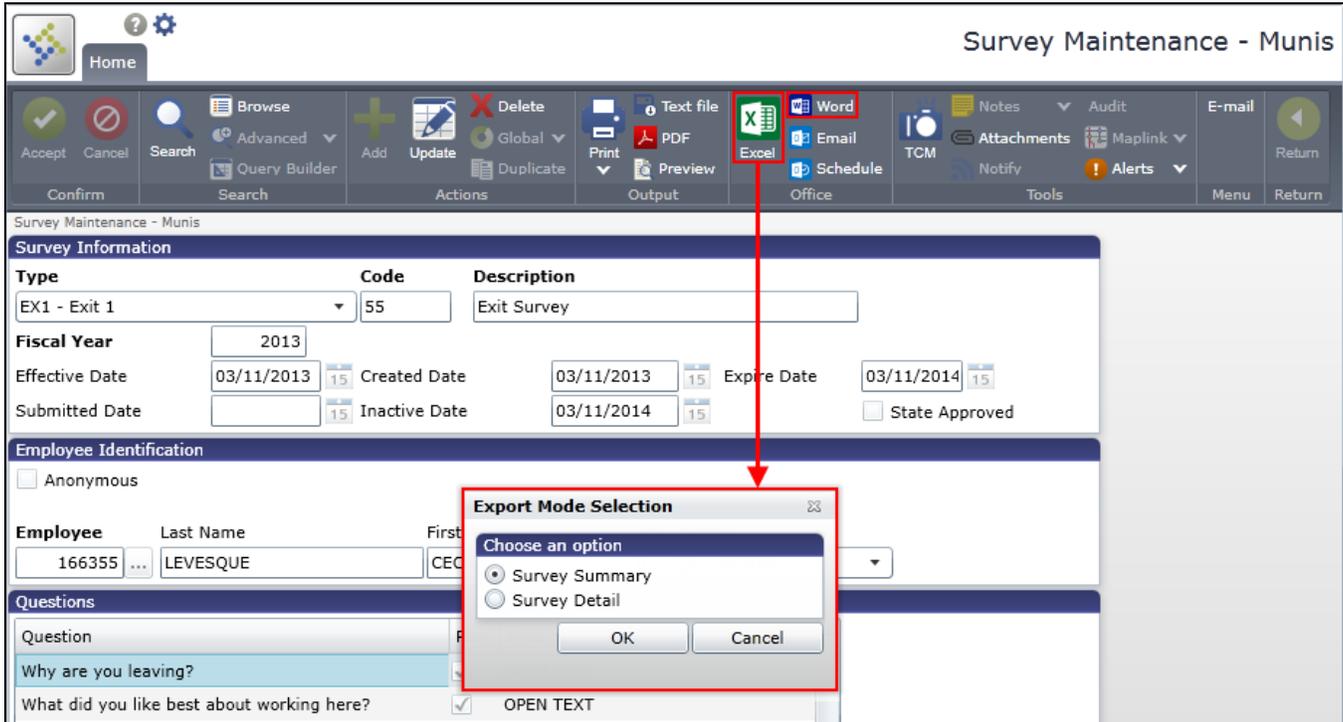
The screenshot shows the 'Position Control - Position Change/Request' interface. A red arrow points from the 'Types' option in the top navigation bar to the 'Position Change Default Pay/Deduction Types - Munis' screen. The 'Position Change Default Pay/Deduction Types - Munis' screen displays a table of defaults for a position with ID 14, ACCOUNTANT.

Pay	Deductions	Accrual Type	Accrual Table
201 - OVERTIME	1000 - FICA	1 - VACATION	1 ... VACATION
300 - VAC TIME	1100 - MEDICARE	2 - SICK	1 ... SICK
400 - SICK TIME	3000 - FED TAX		

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.

403(b) Data Export - Munis

Execute this export: Now

Export Layout: [Dropdown]

Date: 12/31/1895 to 12/31/1895

Location: [Empty] to [Empty]

Org: [Empty] to [Empty]

Months before eligibility: 0

Base eligibility on: Hired Date

Exclude Inactive Employees

Include Option: [Dropdown]

Pays / Deductions

Field	Referer	Range	Range
-------	---------	-------	-------

- 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.

The screenshot displays the 'Accrual Payroll Buyout - Munis' application. The main window shows a toolbar with an 'Email' button highlighted by a red box and a red arrow pointing to the 'Accrual Payroll Buyout Email Template' window. The 'Email' button is also highlighted with a red box. The 'Email Template' window shows the following fields:

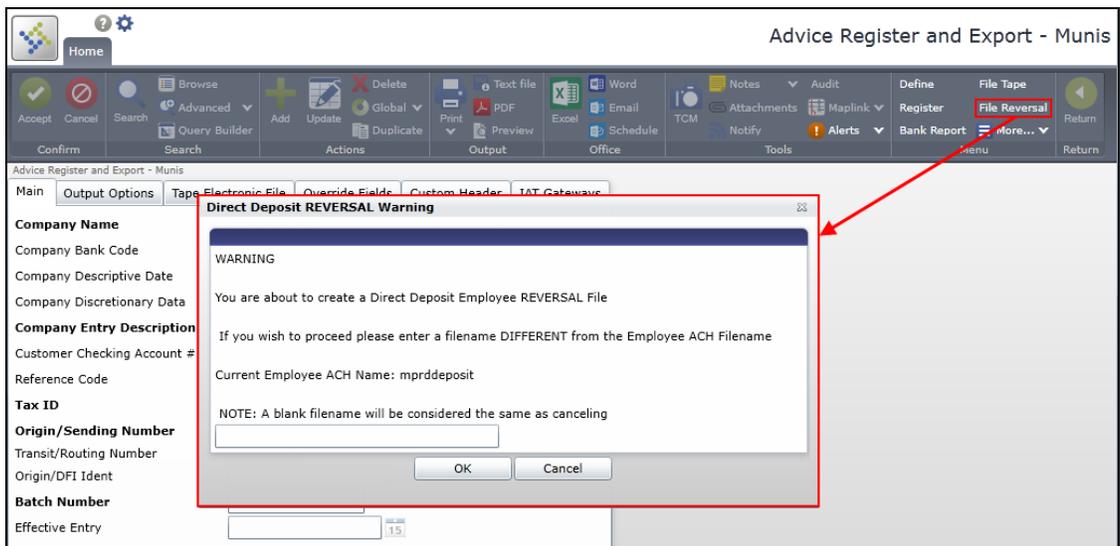
- To Email: PRIMARY EMAIL ADDRESS
- From Email: melfring@tylertech.com
- Subject: Accrual Buyout Notification
- Body: Dear [*EMPNAME*],
Your balance for the accrual [*ACDESC*] has exceeded the limit of [*LIMIT*]. As a result, the excess has been liquidated and purchased for the amount of [*BUYOUT*]. Expect to see this amount reflected within your next paycheck.
Thank you.

The 'Email Notifications' checkbox is checked in the left-hand menu.

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

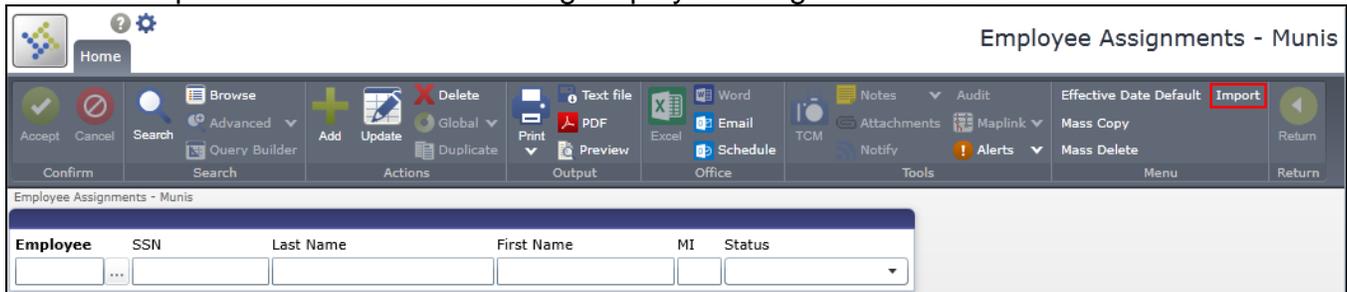
The Advice Register and Export program displays a warning when you select the File Reversal or Vendor Reversal options. This prevents you from performing an accidental reversal.



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.

Employee Master - Munis

Employee Identification

Employee	SSN	Last Name	First Name	Middle Name	MI	Suffix	Status
166355	001-11-1122	LEVESQUE	CECILE				A - ACTIVE

Preferred Name: CECI

Main | Dates | Demographics | Address | Payroll | Mail Sort | Last Change | Benefit FTEs

Address Information

Line 1: 372 ROUTE 1
 Line 2:
 City: MONTREAL
 State: QC | Zip: B5B 6A8
 Country: CAN - CANADA
 County:

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.

Miscellaneous Codes - Munis

Code Type: CTRY - COUNTRY CODES
 Code: CAN
 Short Desc: CANADA
 Long Desc: CANADA
 Data: A#AS#A#

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.

The screenshot displays the 'Deduction and Benefit Master - Munis' interface. The 'Deduction Identification' section shows Deduction 1100 - MEDICARE. The 'Primary Information' section shows 'Calc Code' as '03 - PCT FROM DEDUCTION MASTER', which is highlighted with a red box. A red arrow points from this box to a pop-up window titled 'Assign Additional Medicare Thresholds & PCT'. This pop-up window shows 'Annual Threshold Ranges' for Deduction 1100 - MEDICARE with a table containing one row: From Gross Amt 200,000.00, To Gross Amt 999,999.99, and Percent 0.90. The 'Amounts/Limits' section shows 'Empe Amt/Pct' as 1.4500.

Use this function to set wage ranges within which additional Medicare tax rates apply. 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.

Quarterly 941 Report - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Print PDF Preview Excel Word Email Schedule TCM Notes Attachments Notify Alerts Define Return

Quarterly 941 Report - Munis

Main

Execute this report: Now

Report Quarter / Year: Specify 3 / 2013

Create XML Export

FICA: 1000 to 1000

Medicare: 1100 to 1100

FIT: 3000 to 3000

Location: to ZZZZ

Org: to ZZZZZZZZ

Override FICA rates

Override Medicare rates

Employee: .0000 Employer: .0000

Employee: .0000 Employer: .0000

Extra Pct: 2.35 Extra Medicare Threshold: .00

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.

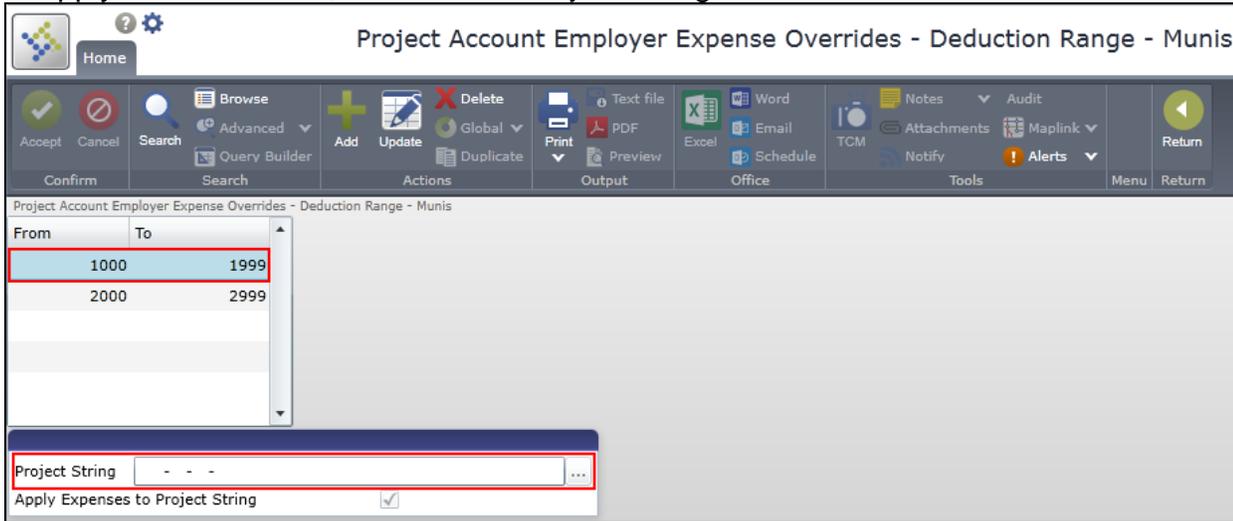
The screenshot shows two overlapping windows from the 'Munis' software. The top window is 'Deduction and Benefit Master - Munis'. It features a ribbon with various actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', etc. A dropdown menu is open, showing options like 'Premium Table', 'Benefit Arrears', 'Payables', 'FTE Table', and 'Project Ledger Exp', which is highlighted with a red box and a red arrow pointing to the bottom window.

The bottom window is 'Project Account Employer Expense Overrides - Deduction - Munis'. It has a similar ribbon and a table with the following data:

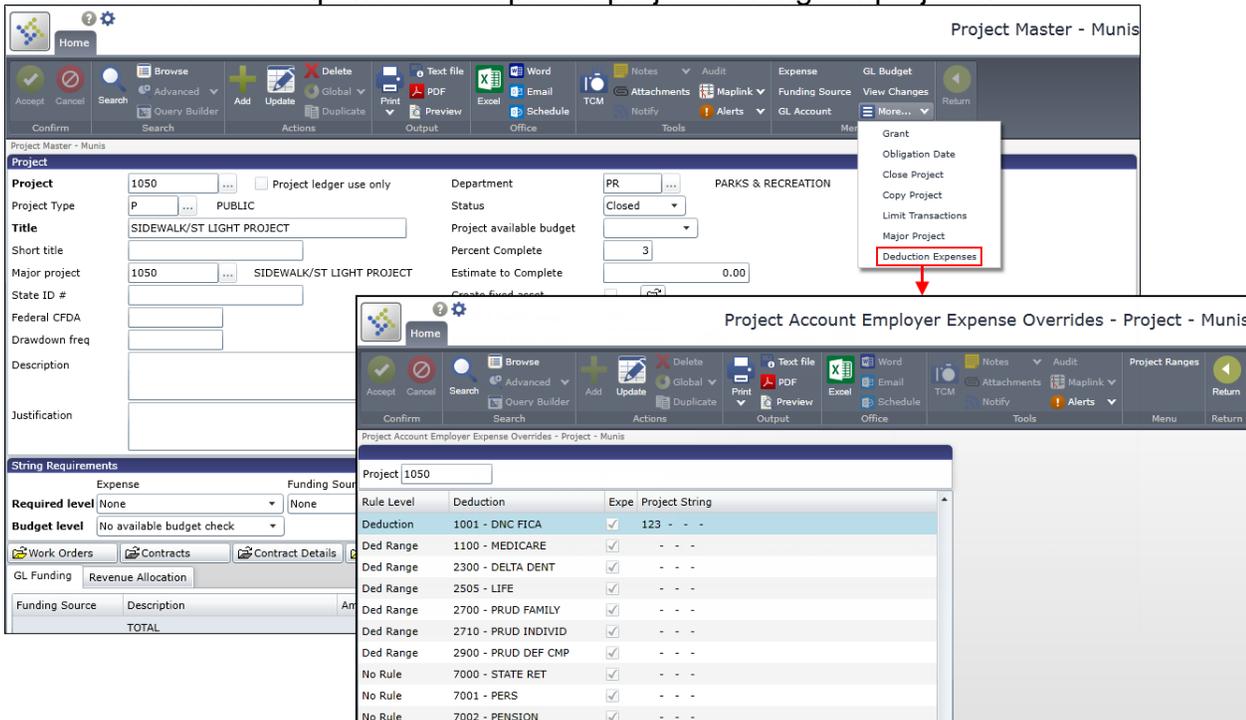
Rule Level	Deduction	Expe	Project String
This Level	1001 - DNC FICA	<input checked="" type="checkbox"/>	123 - - -
Ded Range	1100 - MEDICARE	<input checked="" type="checkbox"/>	- - -
Ded Range	2300 - DELTA DENT	<input checked="" type="checkbox"/>	- - -
Ded Range	2505 - LIFE	<input checked="" type="checkbox"/>	- - -
Ded Range	2700 - PRUD FAMILY	<input checked="" type="checkbox"/>	- - -
Ded Range	2710 - PRUD INDIVID	<input checked="" type="checkbox"/>	- - -
Ded Range	2900 - PRUD DEF CMP	<input checked="" type="checkbox"/>	- - -
No Rule	7000 - STATE RET	<input checked="" type="checkbox"/>	- - -
No Rule	7001 - PERS	<input checked="" type="checkbox"/>	- - -
No Rule	7002 - PENSION	<input checked="" type="checkbox"/>	- - -

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.

Projection Start and Status - Munis

Run: 188, Description: 2014 PROJECTION, Start: 01/01/2014, End: 12/31/2014

Change Category: BUDG - ANNUAL BUDGET PROJECTION

Deduction Factors		
Begin	End	Factor

Partial Year Projection

Include Inactives

Include Benefits

Salary Projection Processing | Benefit Projection Processing | Post Projection | Last Updated

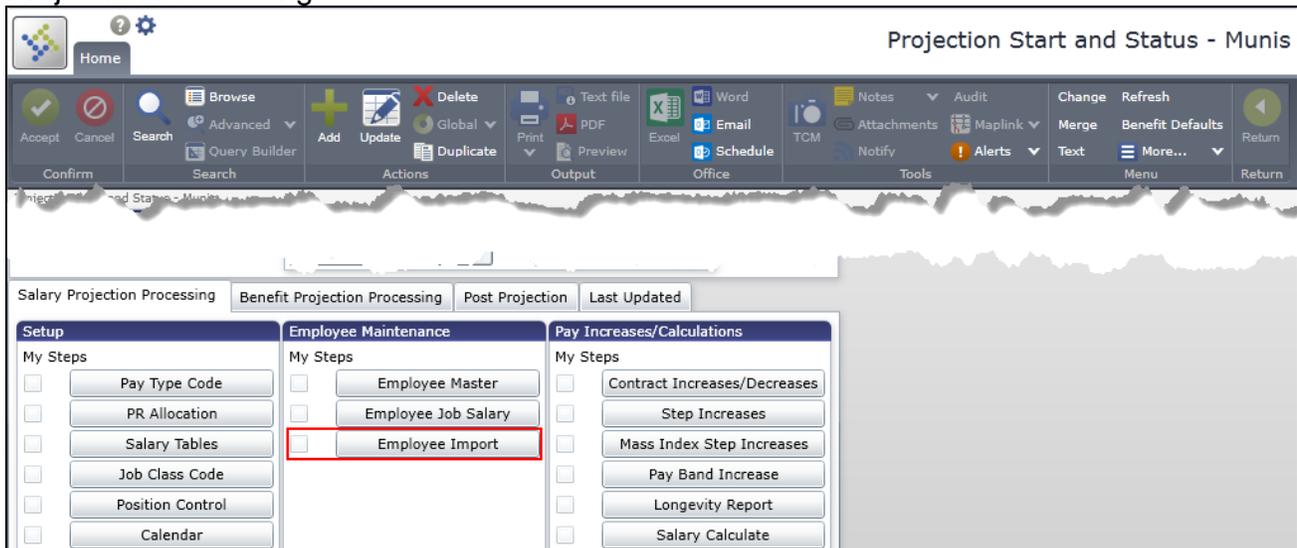
Setup | Employee Maintenance | Pay Increases/Calculations

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 Advanced Query Builder Actions Global Duplicate Print PDF Preview Output Office TCM Notes Attachments Notify Alerts 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 premp pay with pay

Deduction Information

File

Form SLC - SLC test

Import File Path

Path

Import File Criteria

User Defined Codes

Delimiter

Add Code

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.

The screenshot shows the Tyler Technologies Employee Self Service interface. The page title is "Enrollment Sections - Munis". The user is identified as "LEVESQUE, CECILE C" with a "Resources" dropdown menu. The page is titled "Benefits" and includes a "Report/View Life Events" link. A warning message states: "You must complete your open enrollment before 12/31/2013. After you make changes to your elections, please click 'Continue' to review and submit them." Below this is a table of "Current Year Elections":

Benefit	Current Election	Actions
DENTAL INSURANCE	DELTA DENTAL - EMPLOYEE ONLY \$0.33 details	Decline benefit Change New Election
HEALTH INSURANCE	PRUDENTIAL - PPO - EMPLOYEE ONLY \$0.00 details	Decline benefit Make New Election

At the bottom of the table, there is a "Continue" button. Below the table, it states: "All costs are per pay period. Your estimated total cost per pay period is \$0.33." There is also a "Printer friendly page" link. On the left sidebar, under "Links", the "Always Available" checkbox is checked and highlighted with a red box. A red arrow points from this checkbox to the "Decline benefit | Change New Election" link in the table.

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.

The screenshot shows the Tyler Technologies Employee Benefits Enrollment interface. The page title is "Employee Benefits Enrollment - Munis". The user is identified as "LEVESQUE, CECILE C" with a "Resources" dropdown menu. The page is titled "Employee Benefits Enrollment - Munis". The "Employee Identification" section includes fields for Employee, SSN, Last Name, First Name, MI, and Status. The "Group/BU" dropdown menu is open, and the "Changes to Current Benefits" option is highlighted with a red box. Below this is the "Elections" section, which includes fields for Benefit Year, Enrollment Status, and Posted. At the bottom, there is a table with columns: Section, Choice, Description, Election Status, Form Status, Elec Amount, Value, Empe Cost, and Premium.

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.

Changes to Current Benefits - Munis

Employee Identification

Employee: 166355, SSN: 001-11-1122, Last Name: LEVESQUE, First Name: CECILE, MI: , Status: ACTIVE

Location: 135 - FINANCE DEPARTMENT, Group/BU: 10 - NON UNION

Elections

Benefit Year: 2012, Enrollment Status: 2 - IN PROGRESS

Section	Choice	Description	Election Status	Form Status	Elec Amount	Value	Empe Cost	Premium
DNTL - DENTAL INSURANCE	2300	DELTA DENTAL - EMPLOYEE ONLY	2 - ELECTION MADE		0.00		0.33	0.00

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.

tyler technologies

LEVESQUE, CECILE C Resources

Enter time

Back ACCOUNTANT III Save for later Submit

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Total
Aug 2013	9/22	9/23	9/24	9/25	9/26	9/27	9/28	
HOURLY TIME		8	7					15
VACATION TIME	32 available							

Hours Project ledger account General ledger account Notes Add line item Edit Delete

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.

The screenshot shows the Tyler Technologies interface. At the top left is the Tyler Technologies logo. At the top right, the user name 'HIGGINS, SEAN' and a 'Resources' dropdown menu are visible. Below the header is a navigation sidebar with links for 'Home', 'Employee Self Service', 'Benefits', and 'Certifications'. The main content area is titled 'Pending timesheets' and contains a table with the following data:

Name	Position	Period	Hours	Action
LEVESQUE, MARY	ACCOUNTANT II	7/22/2013 - 7/24/2013	24.00	View
PARKER, KATHLEEN A	ACCOUNTANT II	7/22/2013	8.00	View

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

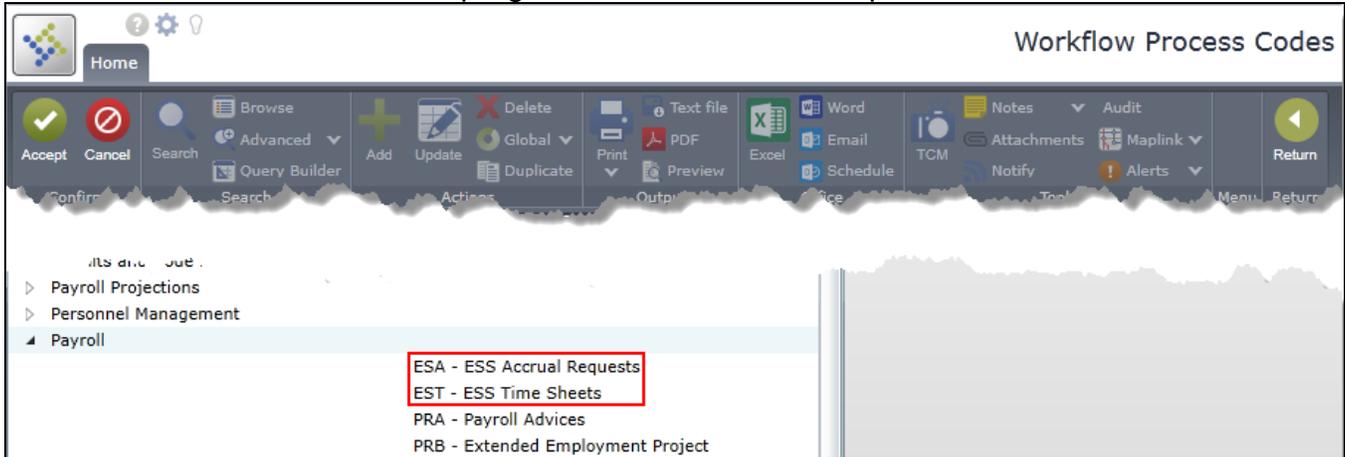
The screenshot shows the 'Approve time off for LEVESQUE, MARY ACCOUNTANT II' screen. At the top, it says 'Approving 0 out of 52.00 from 7/22/2013 to 7/30/2013'. There are buttons for 'Mark all as approved', 'Edit', and 'Submit'. Below this is a calendar grid with columns for days of the week and rows for dates. The grid shows 'HOURLY TIME' for Monday (7/22), Tuesday (7/23), and Wednesday (7/24), with 8 hours each, and a total of 24 hours for the week. Below the grid, there are buttons for 'Approve', 'Reject', 'Forward to', 'Hold', and 'Comments'. The 'Forward to' dropdown menu is set to 'Delina Hill'. At the bottom, there is a section for 'VACATION TIME'.

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

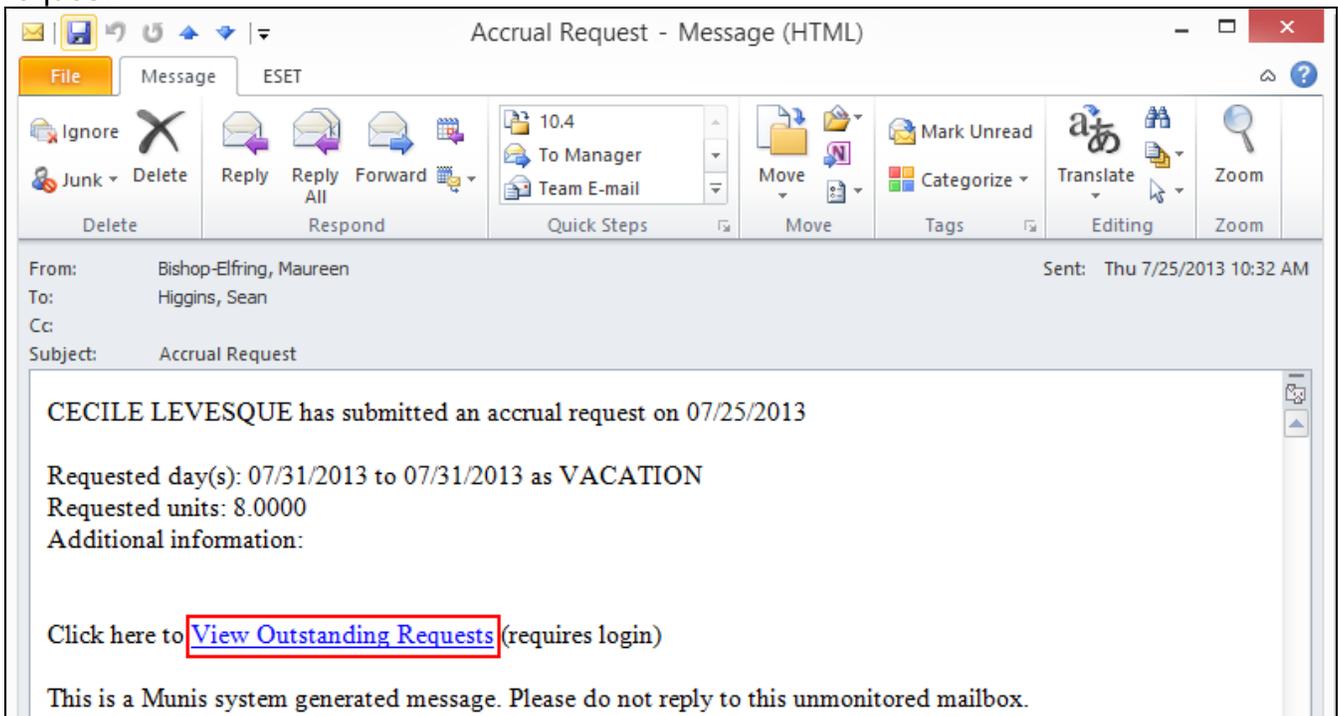
The Employee Self Service (ESS) accrual and time sheet approval processes have been updated to accommodate the Munis Workflow functionality.

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.

tyler technologies HIGGINS, SEAN Resources

Manage Time Off Requests

Calendar view

LEVESQUE, MARY : ACCOUNT II

	Earned	Projected Earned through 9/24/2013	Projected Available* through 9/24/2013
VACATION (H)	32.00	32.00	0.00
SICK (H)	15.00	15.00	15.00
	47.00	47.00	15.00

Dates Requested	Amount	Type	Status	Reason	Comments
7/30/2013	4 hours	VACATION	InProgress		
Approve Reject Forward to Delina Hill Hold Comments <input type="text"/>					
7/29/2013	8 hours	VACATION	InProgress	EXCUSED	BUYING NEW CAR
Approve Reject Forward to Delina Hill Hold Comments <input type="text"/>					

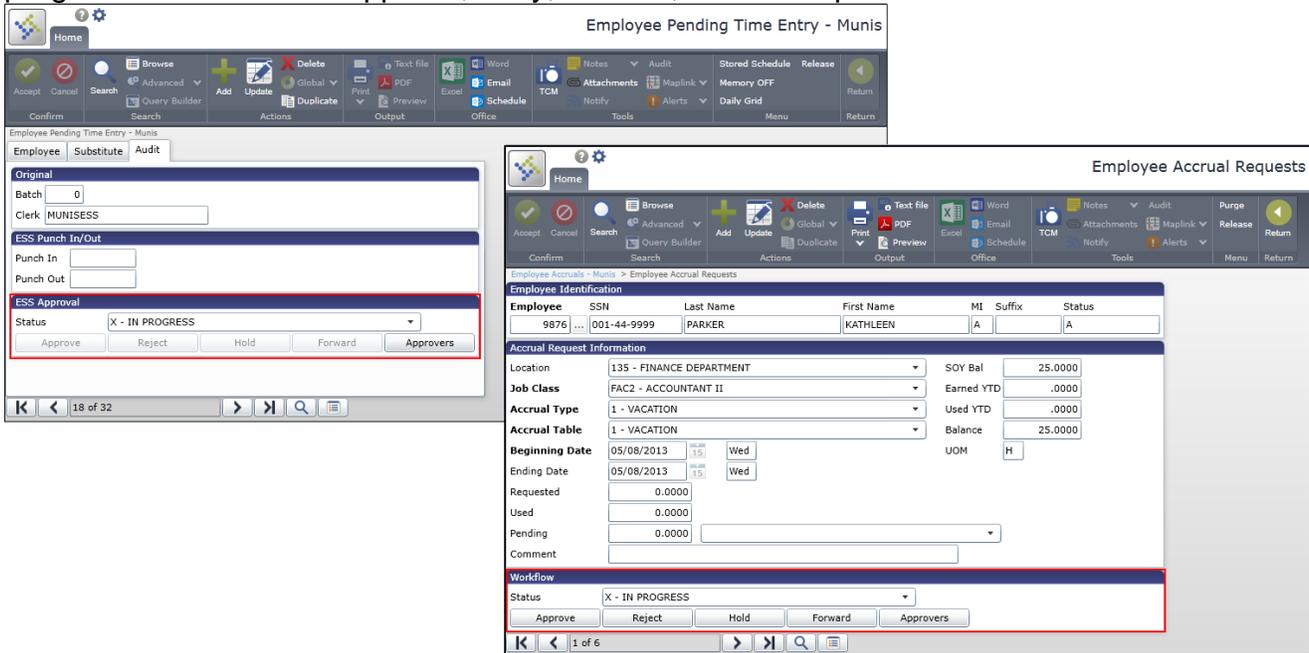
PARKER, KATHLEEN A : ACCOUNT II

	Earned	Projected Earned through 9/24/2013	Projected Available* through 9/24/2013
VACATION (H)	25.00	25.00	0.00

- Home
- Employee Self Service
- Benefits
- Certifications
- Expense Reports
- Pay/Tax Information
- Performance Evaluations
- Personal Information
- Position Transfer
- Substitute Teaching
- Time Off**
 - Request Time Off
 - My Requests

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.

Employee Add Wizard
Welcome, Sean Higgins

Employee Add Wizard

Applicant Contact Demographics Employment SalaryTax Confirmation Finished

Action Effective Date: 8/1/2013
Action Code: NEW HIRE
Reason Code: NEW POSITION

First Name:
Middle Name: MI:
Last Name:
Suffix: SSN: [SSN Info](#)

Address 1: Home Phone:
Address 2: Country:
City: Email:
State: Alt Email:
Zip:

Help Restart

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.

HR Command Center
Welcome, Sean Higgins

Positions Accounts

1

Advanced Search

Actions: Add Position, Transfers, Job Classes, Salary Tables, Encumbering, Index Steps, Office, Reports, Setup

View/Maintain: Excel, Reports, Setup

Positions (1)

1	HEAD ACCOUNTANT	Group/BU	NON UNION	Employee	VACANT	Details
Job Class	ACCOUNTANT III	Status	PENDING	Create Date	07/01/2004	
Location	FINANCE DEPARTMENT	Pos type	ADMINISTRATION	EEO class		
Pers status		Org	11135000	Object	5110	Project
Allocation		Project Account				
Project Allocation	ALLOC					

More

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

HR Command Center
Welcome, Sean Higgins

Positions Accounts

Position Job Openings History Excel Email Notes TCM Attach Return To Search Return

View/Maintain Office Tools Return

1 HEAD ACCOUNTANT
ACCOUNTANT III, FINANCE DEPARTMENT

Position Certification Requirements

Main Account Comments |

Org 11135000 View

Object 5110

Project

Project Allocation ALLOC

Project Allocation ALLOC

Type	Area	Level	Subject
ACCOUNTING	EXCEL	CERT1	ACCOUNT

Account	Percent
100-EP2-ET3-ES4	50.000
123	50.000

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.

Rebuild Budget Detail

This process will delete all existing detail data and attempt to rebuild detail data from position information and employee data.

Current rebuilds the current active position only. All rebuilds all positions in the active set.

Rebuild detail data?

Current All Cancel

Account	FTE	Unexpended	Encumbered	Projected	Savings
1000-0-000-000-00-0000-0-5110 -		300.00	0.00	325.00	-25.00
1000-1-974-000-00-00-0000-0-5110 -		150.00	0.00	150.00	0.00

Totals	FTE	Orig Bud	Revised Bud	Expended	Unexpended	Encumbered	Projected	Est Savings
Salary	1.0000	300.00	450.00	0.00	450.00	0.00	475.00	-25.00
Benefits		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand	1.0000	300.00	450.00	0.00	450.00	0.00	475.00	-25.00

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.

The screenshot shows the 'Employee Accruals - Munis' application. The 'Factor' option is highlighted in the 'More...' menu. The 'Factor Accrual Hours' screen is open, showing the following data:

Employee	SSN	Last Name	First Name	MI	Suffix	Status
103	201-38-4957	SORIANO	JANICE	K		ACTIVE

Employee Accrual Information

Location: 135 - FINANCE DEPARTMENT
 Job Class: SOY Balance: 192.0000
 Type: 1 - VACATION
 Table: 1 - VACATION
 Earned YTD: .0000
 Used YTD: .0000
 Available: 192.0000

History

Start	End	Earned
09/12/2007	09/12/2007	192.0000
09/11/2007	09/11/2007	.0000
04/21/2007	04/21/2007	192.0000
04/20/2007	04/20/2007	.0000

Employee Accrual

Old Units: 40.0000
 New Units: 60.0000
 Effective Date: 01/08/2014
 Reason Code: [Dropdown]

Calculated Accrual

Old Accrual Running Balance:	192.0000
Old Accrual Available Balance:	192.0000
Old Units:	40.0000
New Units:	60.0000
Accrual Change Ratio:	4.8000
Accrual Change:	96.0000
New Accrual Running Balance:	288.0000
New Accrual Available Balance:	288.0000

Adjust Employee Accrual Records

An Accrual History record will be added for

Employee Number 103
 Employee Job
 Effective date 01/08/2014
 Accrual Type 1
 Accrual Table 1
 Earned Time 96.0000
 Used Time 0.0000
 Reason code 9
 New Running Account Balance 288.0000
 New Available Accrual Units 288.0000

Are you sure you wish to add this record?

Yes No

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 screenshot shows the 'Accrual Tables - Munis' interface. The 'Accrual Type' is '2 - SICK' and the 'Table' is '1'. The 'Long Description' and 'Short Description' are both 'SICK'. The 'Limit' tab is selected, and the 'Option' is 'N - NO ENFORCEMENT'. The 'Transfer 1' and 'Transfer 2' fields are set to '0.00'. The 'Accrual Loan Payback' section is highlighted with a red box, showing the 'Loan Payback' set to 'L - LOAN PAYBACK' and the 'Transfer on Zero Balance' checkbox checked.

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.

Home
Employee Accrual History

Accept Cancel Search Browse Advanced Add Update Delete Global Duplicate Print PDF Text file Excel Word Email Schedule Attachments Notify Maplink Alerts Return

Confirm Search Actions Output Office Tools Menu Return

Employee Accruals - Munis > Employee Accrual History

Employee Identification

Employee	SSN	Last Name	First Name	MI	Suffix	Status
178	555-66-5555	HIGGINS	SEAN			ACTIVE

Accrual History Detail

Location	135 - FINANCE DEPARTMENT	SOY Balance	-40.0000
Job Class	FAC1 - ACCOUNTANT I	Earned YTD	15.0000
Type	L - LOAN PAYBA	Used YTD	.0000
Table	1 - LOAN PAYBACK	Available	-25.0000
Start Date	01/10/2014 FRI	Liability	0.00
End Date	01/10/2014 FRI Year 0	UOM	H
Comment			
Pay			
Rate	0.0000		

Accrual Used/Earned Detail

Used	0.0000	Reason	
Earned	15.0000		12 - LOAN PAYBACK TRANSFER IN/OUT
Running Balance	-25.0000		

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.

The screenshot shows the 'Location Codes - Munis' application window. The top navigation bar includes 'Home', 'Accept', 'Cancel', 'Search', 'Advanced', 'Add', 'Update', 'Global', 'Delete', 'Print', 'Preview', 'Excel', 'Word', 'Email', 'Schedule', 'Attachments', 'Notify', 'Maplink', 'Alerts', 'Menu', and 'Return'. The 'GL Rollups' option is highlighted in the 'ESS Defaults' menu.

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.

The screenshot shows the 'Payroll GL Rollups - Munis' application window. The 'ESS Options' tab is selected, and the 'ESS Time Entry GL' box is highlighted with a red box. The 'ESS Time Entry GL' box contains the value '132' and the description 'GL ROLLUPS'. The 'ESS Time Entry PL' box is empty. The 'ESS Options' tab also includes checkboxes for 'Activity', 'Work Order/Task', 'Reason', 'GL Account', 'PL Account', and 'Notes'. The 'GL Account' checkbox is checked.

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.

The screenshot shows the 'Time Entry History - Munis' application interface. The 'WF History' button is highlighted with a red box. An arrow points from this button to the 'Work Flow Status' window. The 'Work Flow Status' window displays a table of approvers' comments and a detailed view of the workflow steps.

Time Entry History - Munis

Employee: 9876, SSN: 001-44-9999, Last Name: PARKER, First Name: KATHLEEN, MI: A

From: 01/15/2014 to 01/15/2014

Job Class: FAC2, ACCOUNTANT II

Pay: 101, HOURLY TIME

Hours Entry: [] to [] From [] to []

Quantity: [] 5.00 HOURS

Allocation: []

Org/Obj/Proj: 11135000, 5110, []

SALARIES FULL TIME - CHANGE

Location: 135 - FINANCE DEPARTMENT

Notes: []

Reason: []

Batch: []

ESS Approval: Y - APPROVED, ESS Date: []

Batch: []

Payroll: PENDING TIME ENTRY

Warrant: [] Batch: []

Clerk: []

Approver ID: []

Work Flow Status

Time Entry History - Munis > Work Flow Status

Approvers' comments

Name	Date	Time	Action	Comment
Maureen Elfring	01/08/2014	10:49	Approved	Sean Higgins Forwarded - 01/08/2014 10:46 Is this
Sean Higgins	01/08/2014	10:46	Forwarded	Is this right?

Steps

Step	Status
1	Complete (Approved)
Sean Higgins	Forwarded
Maureen Elfring	Approved

Details

Approver: Sean Higgins
 Status: Complete
 Approval type: VER
 Step: 1
 Action taken: Forwarded
 Date: 01/08/2014
 Time: 10:46
 Comment: Is this right?

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.

The screenshot displays the 'Benefits Enrollment Settings - Munis' application. On the left, a settings panel for 'Benefits Enrollment Settings - Munis' is shown. The 'Current Year' is set to 2013, and the 'New Year' is set to 2014. Under the 'Show Projected Net Pay Link' section, the checkbox is checked. A red box highlights this checkbox, and a red arrow points from it to the 'paycheck simulator' link on the 'Open Enrollment' page.

The 'Open Enrollment' page shows the following table of benefit elections:

Benefit	Current Election	New Election	Actions
DENTAL INSURANCE	No Election Made	DENTAL INDIVIDUAL PLAN \$50.00 details	Decline benefit Change New Election
HEALTH INSURANCE	No Election Made	PRUDENTIAL INDIVIDUAL PLAN \$100.00 details	Decline benefit Change New Election
LIFE INSURANCE	No Election Made	Declined	Change New Election

At the bottom of the page, a note states: "All costs are per pay period. Your estimated total cost per pay period is \$150.00. The [paycheck simulator](#) can show how this affects your net pay." A red box highlights the 'paycheck simulator' link.

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.

	Current	Simulation
Gross Pay	3200.00	3200.00
Federal Tax	0.00	0.00
State Tax	135.75	128.75
Local Tax	0.00	0.00
FICA	198.40	192.20
Medicare	46.40	44.95
Other Deductions	230.77	150.00
Net Pay	2588.68	2684.10

Munis Central Programs 10.5

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 10.5.

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.

The screenshot shows the 'Position Central' interface for a user named Sean Higgins. The main title is '1 HEAD ACCOUNTANT' with the subtitle 'ACCOUNTANT III, FINANCE DEPARTMENT'. A red box highlights the 'Default Types' pane, which contains a table of default types. The table has columns for 'Code' and 'Description'. The entries are:

Code	Description
300	VACATION TIME
500	PERSONAL TIME
600	LONGEVITY FLAT AMOUNT
999	DOCK PAY

Other panes visible include 'Certification Requirements' with a table showing 'ACCOUNTING EXCEL CERT1 ACCOUN' and a 'Position' pane at the bottom.