



Munis Human Resources and Payroll

*Major Enhancements
Version 10.4
November 1, 2013*

TABLE OF CONTENTS

Munis Human Resources and Payroll.....	4
Human Resources.....	4
Applicant Master.....	4
Applicant Processing.....	5
Case Management Settings	8
Employee Emergency Contacts.....	9
Employee Evaluations	11
Employee Master.....	13
Mass Salary Changes	14
Employee Certification Options.....	15
Employee Certifications	16
Personnel Settings.....	17
Position Control.....	17
Surveys Maintenance	19
Payroll	20
403(b) Data Export.....	20
Accrual Payroll Buyout.....	21
Advice Register and Export	21
Employee Assignments.....	22
Employee Master.....	22
Medicare Tax for High Earners	24
Deduction and Benefit Master	24
Quarterly 941 Report.....	25
Pay Master.....	25
Payroll Control Settings	26
Project String Overrides	27
Salary and Benefit Projections.....	29
Projection Start and Status	29

Employee Self Service	31
Benefits.....	31
Time Entry	32
Workflow.....	34
 System Administration - HR/Payroll Roles	 37
 Munis Central Programs	 38
HR Command Center.....	38
Employee Add.....	38
Positions.....	39

Munis Human Resources and Payroll

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

Human Resources

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.

The screenshot shows the 'Applicant Master - Munis' interface. The 'Employee Information' section is highlighted with a red box. The status 'TERMINATED' is displayed in red text to the right of the Position box.

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

<input type="checkbox"/> Applied Previously	<input checked="" type="checkbox"/> Current Employee	<input checked="" type="checkbox"/> Former Employee
800427 - HELEN ALMON		
Current/Prior Position		

Employee Information

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

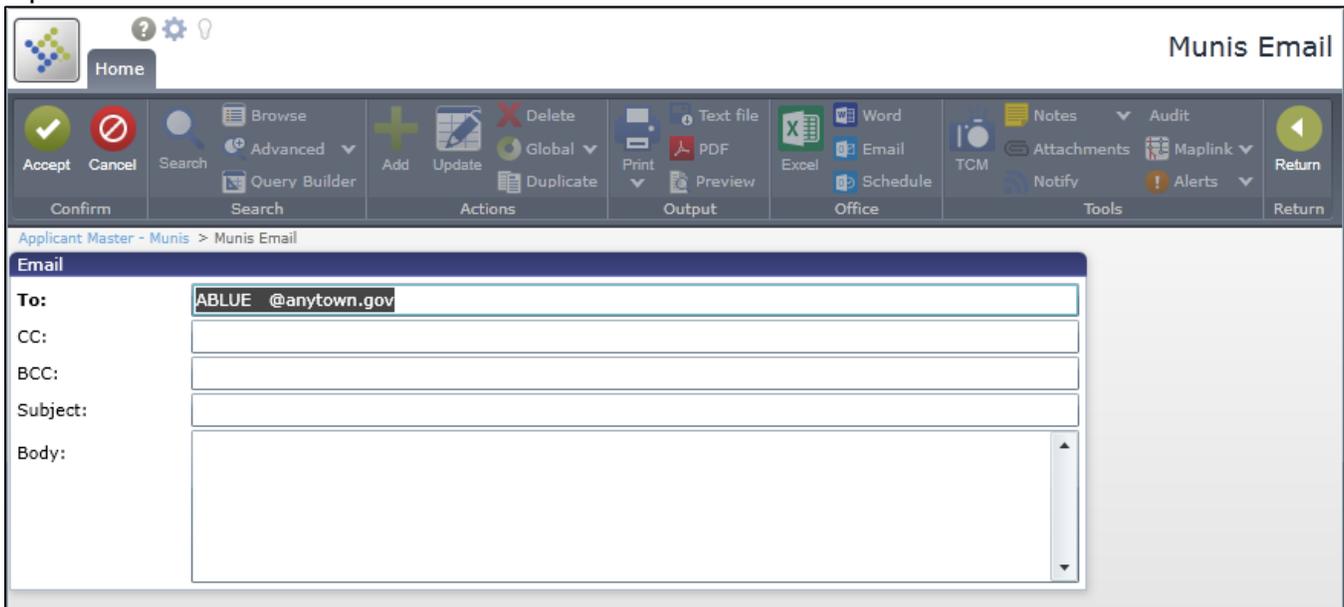
Availability

Available Start: []

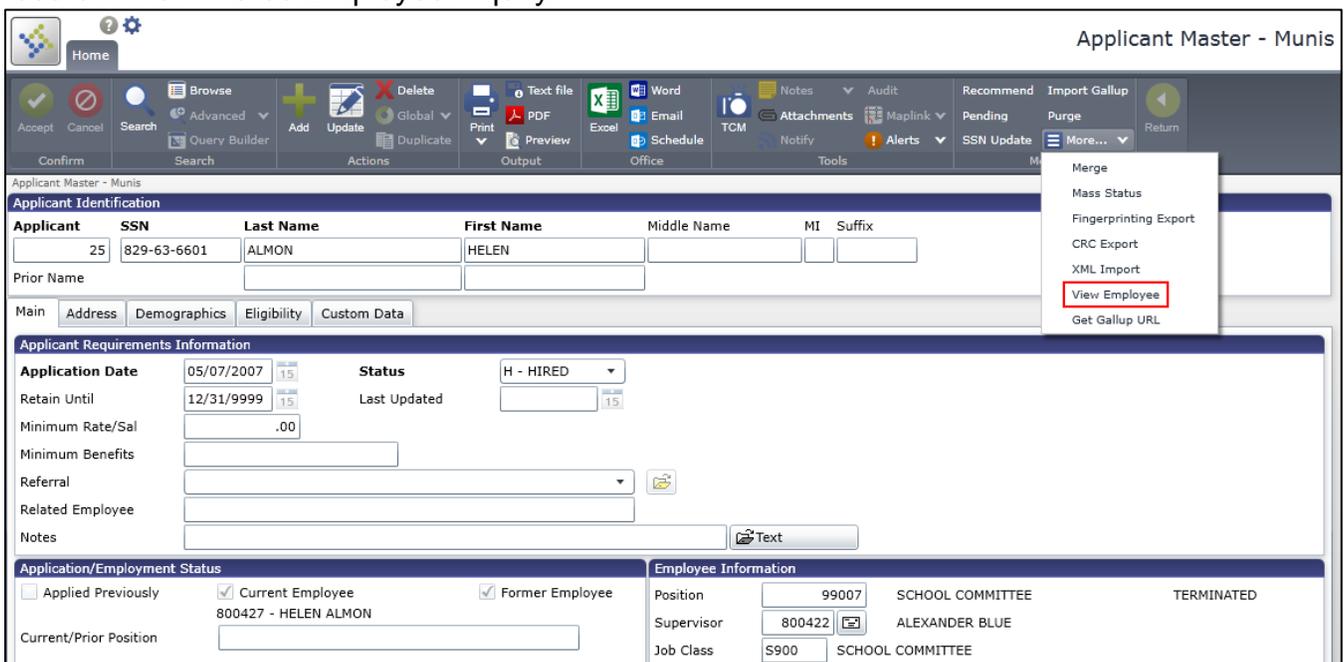
Full Time Part Time Days Nights Temporary Summer

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

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



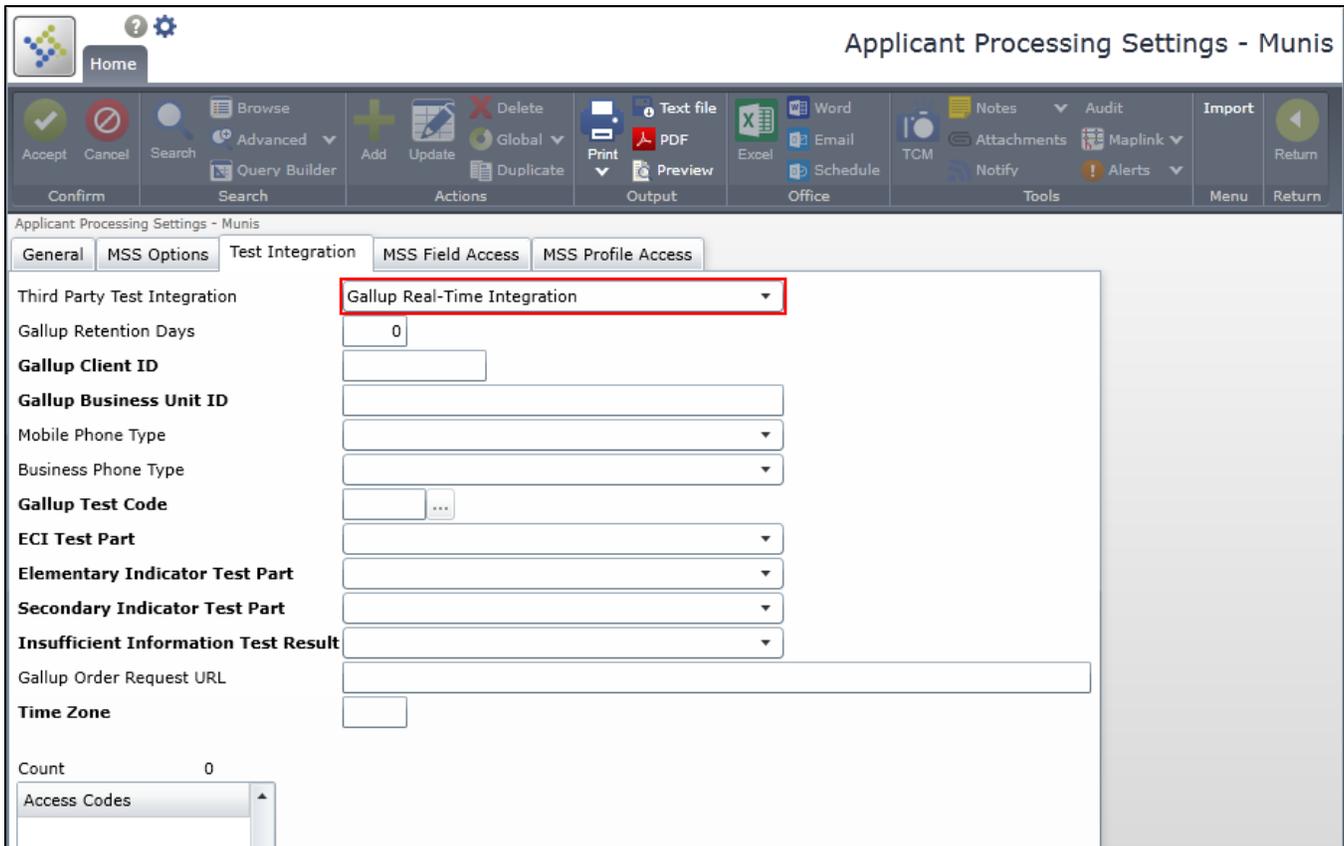
If you have the necessary permissions, click View Employee to display the active applicant's record in Employee Inquiry. If the applicant was terminated, this button displays his or her record in Terminated Employee Inquiry.



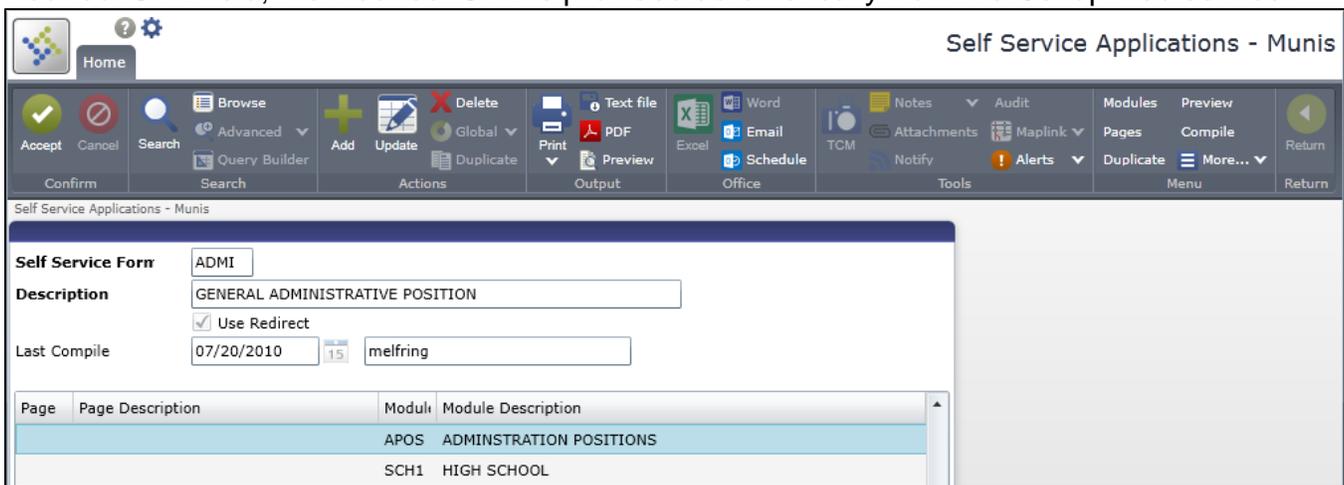
Applicant Processing

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.

Applicant Master - Munis

Applicant Identification

Applicant	SSN	Last Name	First Name	Middle Name	MI	Suffix

Prior Name

Main Address Demographics Eligibility Custom Data

Address

Phone

Address

City

State

Zip

Country

County

Email

Alt Email

Reference

Gallup Code

Gallup Date

Gallup URL

Gallup URL Date

Addresses 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

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

User ID	User Name	View Resolution	Update Status	View SSN	View All Categori	Inquiry Only	Edit All Stages	Restrictions
melfring	Maureen Elfiring	<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

Case Management

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

Category: OTHR - OTHER ACTIONS

Status: 1 - STARTED

Primary HR contact: 64 ... BEDIENT, TIM J

Secondary HR contact: ...

Employee Identification

Employee	SSN	Last Name
155366	001-55-3636	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

Stage Information

Case: 1522

Process Stage: WARN VERBAL WARNING

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.

The screenshot shows the 'Employee Emergency Contacts - Munis' interface. At the top, there is a navigation bar with a 'Home' button and a settings icon. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Browse', 'Add', 'Update', 'Delete', 'Print', 'Text file', 'PDF', 'Excel', 'Word', 'Email', 'Schedule', 'Notes', 'Attachments', 'Maplink', 'Alerts', 'Return', and 'Menu'. The main content area is titled 'Employee Emergency Contacts - Munis' and contains a form for an employee with ID 166355 and SSN 001-11-1122. The employee's name is HAROLD LEVESQUE, first name CECILE, and status is ACTIVE. The form includes fields for Name, Relationship (O - OTHER), Line 1 (12 ELM STREET), Line 2, City (PORTLAND), State (ME), Zip (04103), and Phone (222-222-2222). A section titled 'Additional Telephone Numbers' is highlighted with a red box and contains a table with the following data:

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 Employee Self Service (ESS) interface. The main page is titled 'Personal Information' and shows various fields for an employee named CECILE C. LEVESQUE. A modal window titled 'Edit Emergency Contact' is open, allowing for the modification of an existing emergency contact. The form fields are as follows:

- Name: HAROLD LEVESQUE
- Relationship: OTHER
- Primary Telephone Number: 222-222-2222
- Address: 12 ELM STREET
- Address 2: (empty)
- City: PORTLAND
- State: ME
- Zip Code: 04103
- Comments: (empty)

Below the form fields is a table for 'Additional Phone Numbers':

Number	Type	Comment	Unlisted	
333-333-3333	OFFICE		Y	Delete
555-5555	HOME PHONE MIGRATION	CALL ONLY IF OTHERS BUSY	N	Delete

At the bottom of the 'Edit Emergency Contact' form, there is a link 'Add a phone number'. In the background, the 'Emergency Contacts' table is visible, showing the contact for HAROLD LEVESQUE with a 'Change' button highlighted in red. A red arrow points from this 'Change' button to the 'Edit Emergency Contact' 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. It is divided into several 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 main view shows a form for 'Employee LEVESQUE, MARY' and 'Job ACCOUNTANT II'. The 'Basic Information' section is highlighted, showing fields for 'Completion Date*', 'Rating*' (set to EXCELLENT), and 'Review Type' (set to ANNUAL EVALUATION). The 'Evaluation Criteria' section includes a field for 'Overall Text*'. A sidebar on the right contains navigation links like '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'. The top right corner shows the user 'HIGGINS, SEAN' and a 'Resources' link.

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.

The screenshot shows the 'Evaluation 360 Sources - Munis' application interface. At the top, there is a navigation bar with a 'Home' button and a settings icon. Below this is a ribbon menu with various tools like 'Accept', 'Cancel', 'Search', 'Browse', 'Add', 'Update', 'Delete', 'Global', 'Duplicate', 'Text file', 'PDF', 'Print', 'Preview', 'Excel', 'Word', 'Email', 'Schedule', 'Notes', 'Attachments', 'Maplink', 'Alerts', and 'Return'. The main content area is titled 'Evaluation 360 Sources - Munis' and contains a form for a '360 Source'. The form has the following fields:

- 360 Type:** 1 - Supervisor Evaluation
- Code:** S001
- Short Description:** S EVAL 01
- Long Description:** SUPERVISOR EVALUATION 01
- ESS Template:** S001 - SUPERVISOR TEMPLATE 01

Below the form is a section for 'Default Competencies' which contains a table:

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. The 'Employee Identification' section contains the following data:

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

Below this table, the 'Preferred Name' field is highlighted with a red box and contains the value 'CECI'. Other tabs like 'Main', 'Dates', 'Demographics', 'Address', 'Payroll', 'Mail Sort', 'Last Change', and 'Benefit FTEs' are visible. The 'Employee Information' section below shows details like Job Class (FAC3), Location (135), Group/BU (10), and Pay Frequency (B - BIWEEKLY).

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 'Personal Information' page displays the 'Employee Preferred Name' as 'CECI'. A red arrow points from the 'change' link next to this field to the 'Edit Preferred Name' modal. The modal contains a text input field with 'CECI' and 'Update' and 'Cancel' buttons. The user's name 'LEVESQUE, CECILE C' is visible in the top right corner of the page.

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.

Mass Contract Changes - Munis

Home

Accept Cancel Search Browse Advanced Query Builder Add Update Duplicate Delete Global Duplicate Print PDF Preview Excel Word Email Schedule TCM Attachments Maplink Notify Alerts Define Output-Post Return

Mass Contract Changes - Munis

Location [] to [ZZZZ]
 Org [] to [ZZZZZZZZ]
 Group/BU [12] to [12]
 Job Class [] to [ZZZZ]
 Position [] 0 to [999999999]
 Pay Type [0] to [999]
 Calendar [0] to [999]
 Next Date [] 15 to [] 15

Started Job Before [07/18/2013] 15
 Minimum Days Worked [0] in Year [2006] by [Job Class]
 Minimum Hours Worked [500]
 If over step [50] Min Hours Worked [0]

Options Retirees

Change Option []
 Percentage Rate [.000] of []
 Plus Amount [.00] Apply to []
 Effective Date [] 15
 Rounding Method [NONE]
 Report Sort Order [1 - EMPLOYEE NUMBER]
 Salary Table Defaults
 Active Employees Only
 Include Off-Step/Frozen Employees
 Update Frozen Employee Salary
 Allow Salary Decrease
 Allow Salary to Exceed Maximum
 Increase Salary to Minimum

PM Action Code []

- 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 content area is a form for configuring a pay band increase process. Key fields include:

- Execute this process:** A dropdown menu.
- Location:** From 'ZZZZ' to 'ZZZZ'.
- Org:** From 'ZZZZZZZZ' to 'ZZZZZZZZ'.
- Group/BU:** From 'ZZZZ' to 'ZZZZ'.
- Job Class:** From 'ZZZZ' to 'ZZZZ'.
- Position:** From '0' to '999999999'.
- Pay Type:** From '0' to '999'.
- Calendar:** From '0' to '999'.
- Next Date:** A date field.
- Started Job Before:** '07/17/2013'.
- Minimum Days Worked:** '0' in Year '2011' by Job Class.
- Minimum Hours Worked:** '0'.
- Increase Effective Date:** A date field.
- Increase Type:** 'Percent of pay band mid salary'.
- Increase Percent:** '0.00'.
- Rounding Method:** A dropdown menu with options: NONE, ROUND, ROUND UP, ROUND DOWN, and ROUND TO NEAREST CENT. This field is highlighted with a red box.
- Review Period:** A date field.
- Anniversary Range:** A range field.
- Anniversary Option:** A dropdown menu.
- Lump Sum Pay Type:** A dropdown menu.
- Pay Start and End Date:** A date field set to '12/15/2011'.
- Report Sort Order:** '1 - EMPLOYEE NAME'.
- Options:**
 - Active Employees Only
 - Allow Salary to Exceed Maximum
 - Increase Salary to Minimum
 - Generate Action
- Action Code:** A dropdown menu.

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

Fid	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.

The screenshot shows the 'Personnel Settings - Munis' application. The 'Position Control' tab is active. In the 'Position Control Update' section, the 'Require Only One Certification' checkbox is highlighted with a red box. Other visible options include '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', and 'Use Budget by FTE Vacancy Calc'. The 'Length of Position Number' is set to 4, and 'Hiring Freeze in Employee Job/Salary' is set to 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.

The screenshot shows the 'Job Class Certification Requirements' screen. A table lists certification requirements. The 'Subject' column is highlighted with a red box.

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' (set to 'Main') and 'Certification Requirements'. The 'Certification Requirements' dropdown is expanded, showing a table with columns: Type, Area, Level, and Subject. The 'Subject' column contains the value 'ACCOUNTING', which is 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.

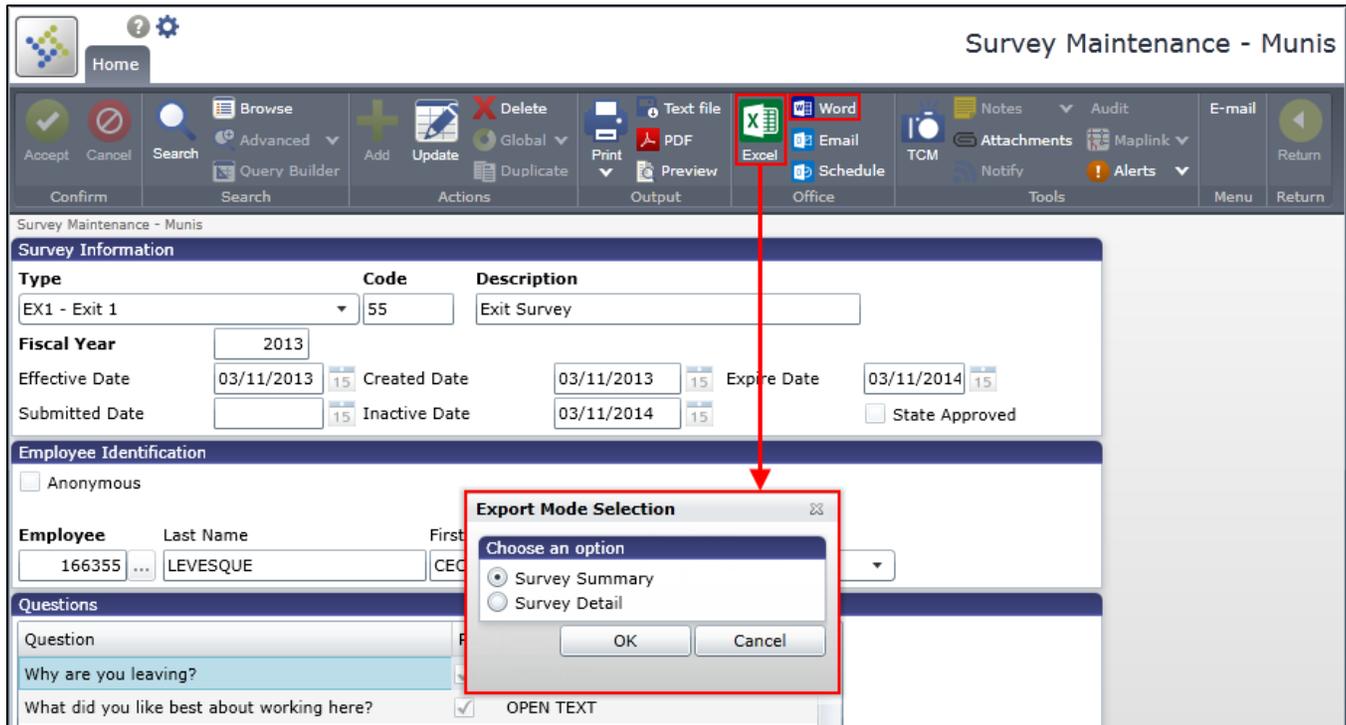
The screenshot shows the 'Position Control - Position Change/Request' interface. The 'Types' option in the top navigation bar is highlighted with a red box, and a red arrow points to it. Below this, the 'Position Identification' section shows details for Position 14, ACCOUNTANT, with Status A - ACTIVE and Create Date 07/16/2013. The 'Position Change Default Pay/Deduction Types - Munis' screen is overlaid, showing a table of defaults for the selected position.

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

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: [Field] to [Field]

Org: [Field] to [Field]

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 shows the 'Accrual Payroll Buyout - Munis' application window. The 'Email' option in the 'Alerts' menu is highlighted with a red box and a red arrow. Below this, the 'Accrual Payroll Buyout Email Template' window is open, showing fields for 'To Email', 'From Email', 'Subject', and 'Body'. The 'Email Notifications' checkbox is checked in the 'Accrual Type' section.

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

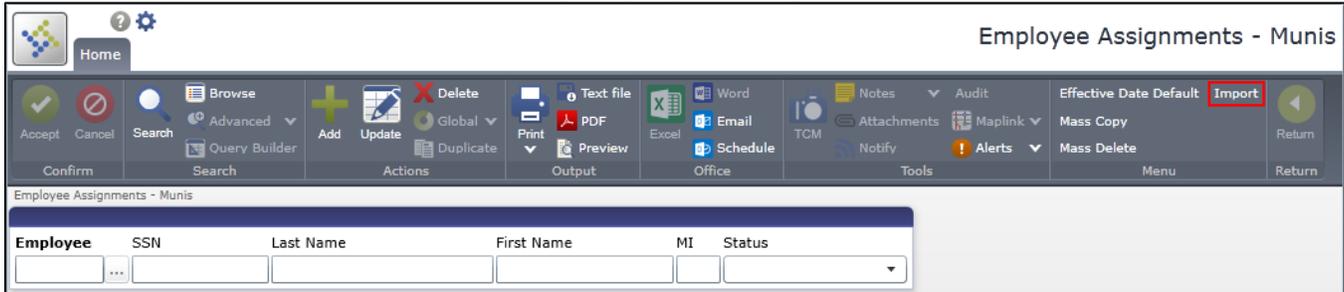
The Advice Register and Export program displays a warning when you select the File Reversal or Vendor Reversal options. This prevents you from performing an accidental reversal.

The screenshot shows the 'Advice Register and Export - Munis' application window. The 'File Reversal' option in the 'File Tape' menu is highlighted with a red box and a red arrow. A 'Direct Deposit REVERSAL Warning' dialog box is open, displaying a warning message: 'WARNING: You are about to create a Direct Deposit Employee REVERSAL File. If you wish to proceed please enter a filename DIFFERENT from the Employee ACH Filename. Current Employee ACH Name: mprdeposit. NOTE: A blank filename will be considered the same as canceling.' The dialog box has 'OK' and 'Cancel' buttons.

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.



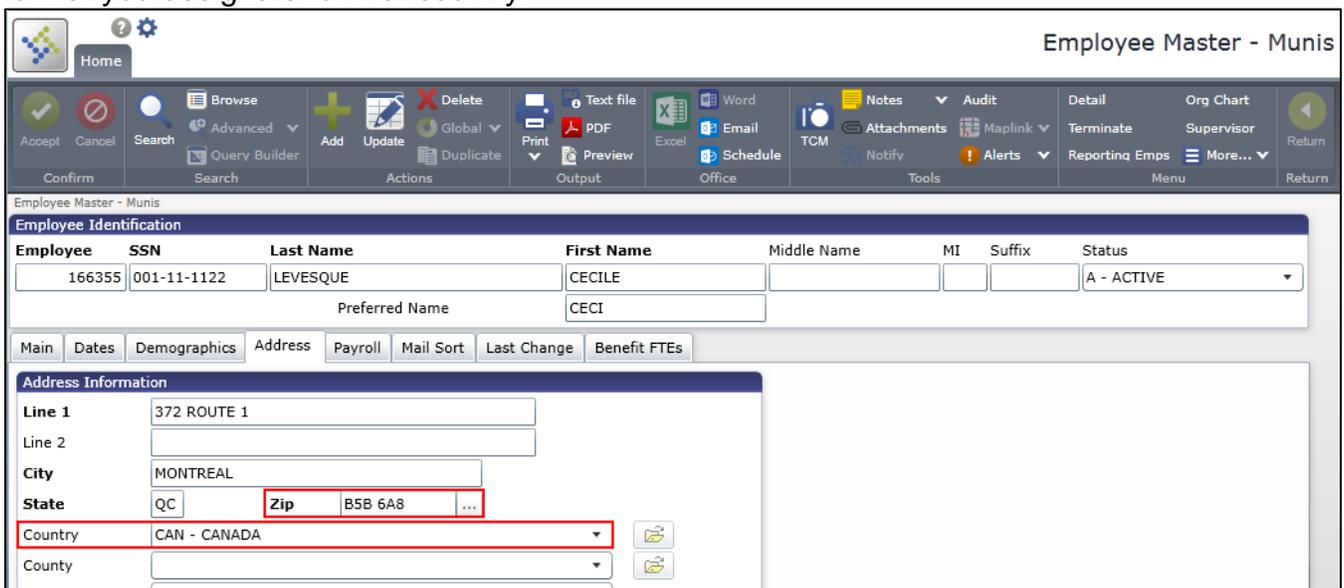
If you import an employee assignment record and a record based on the same employee, assignment, and location already exists in the program, the program updates the existing record to reflect an end date of one day prior to the effective date of the new record.

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.

The screenshot shows the 'Miscellaneous Codes - Munis' application interface. At the top, there is a navigation bar with a 'Home' button and a settings icon. Below this is a ribbon menu with various options: Confirm, Search, Actions, Output, Office, Tools, Menu, and Return. The main area displays a form for entering a country code. The form fields are:

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

At the bottom of the form, there are navigation buttons (back, forward, search, etc.) and a status indicator '1 of 1'.

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' software interface. The main window shows the 'Deduction Identification' section with the following details:

Deduction	Short Desc	Long Description	Abbrev	Start Date	End Date
1100	MEDICARE	MEDICARE	MED	01/01/1900	12/31/9999

The 'Primary Information' section includes:

- Priority: 1
- Category: 01 - TAX
- Insufficiency: M - MANDATORY (MUST BE RESOLVED)
- Calc Code: 03 - PCT FROM DEDUCTION MASTER (highlighted with a red box)
- Empe/Empr: 3 - BOTH PAY
- Vendor Number: 8000 SOCIAL SECURITY ADMN

The 'Amounts/Limits' section includes:

- Empe Amt/Pct: 1.4500
- Empe Annual Amt: .00
- Empe Limit: .00
- Limit Type: Y - CALENDAR YEAR
- Empe Minimum: .00

An 'Annual Threshold Ranges' dialog box is open, showing the configuration for Deduction 1100 - MEDICARE:

From Gross Amt	To Gross Amt	Percent
200,000.00	999,999,999.99	0.90

A red arrow points from the folder icon next to the 'Calc Code' field to the 'Annual Threshold Ranges' dialog box.

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 Advanced Query Builder Confirm Search Actions Add Update Duplicate Global Print PDF Preview Output Text file Word Excel Word Email Schedule Office TCM Notes Attachments Notify Alerts Define Maplink Menu 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: Employee .0000 Employer .0000

Override Medicare rates: 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.

The screenshot shows the 'Pay Master - Munis' interface. The main window displays a 'Pay' record for '101' with 'Start Date' 01/01/1900 and 'End Date' 12/31/9999. The 'Category' is set to 'P - AMT/HRS BLENDED RATE VS CONTRACT RATE'. A red box highlights this category, and a red arrow points to the folder icon next to it. An 'Assign Pay Types' window is open, showing a list of pay types for 'Pay Type Code 101 - HOURLY TIME'. The list includes '205 - FLSA' and '250 - COMP TIME EARNED'.

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 specify whether the current record

Category	Setting	Description
		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.

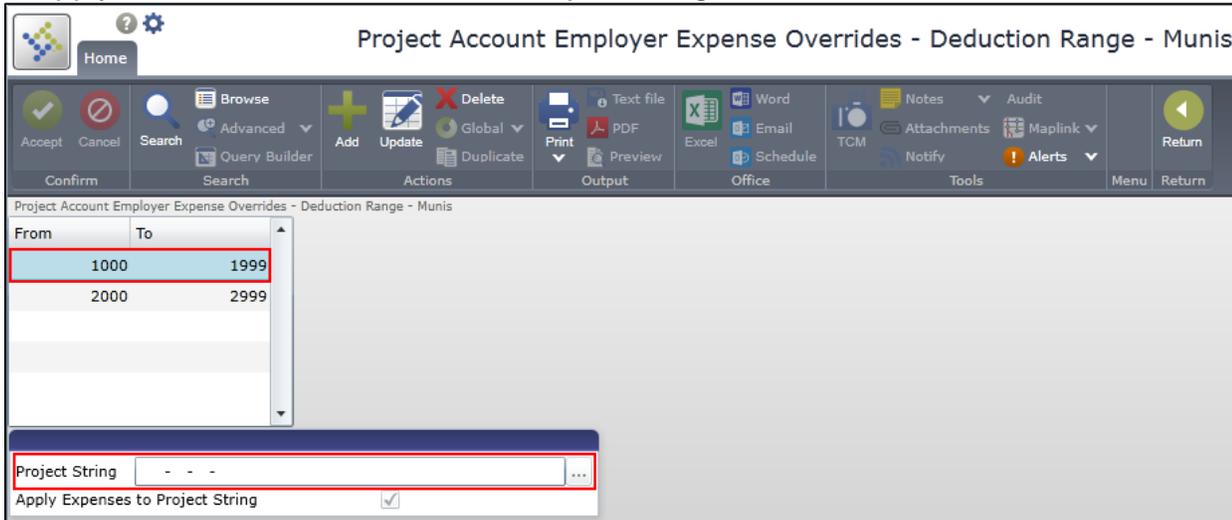
In Deduction and Benefit Master, click Project Ledger Exp to open the Project Account Employer Expense Overrides program in the deduction mode. This mode defines project string overrides to apply to individual deductions. Use the Project String field for any deduction to specify the value of the override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

The screenshot shows the 'Deduction and Benefit Master - Munis' application. A red arrow points from the 'Project Ledger Exp' option in the 'More...' dropdown menu to the 'Project Account Employer Expense Overrides - Deduction - Munis' window. The 'Project Account Employer Expense Overrides' window displays a table of rules for various deductions.

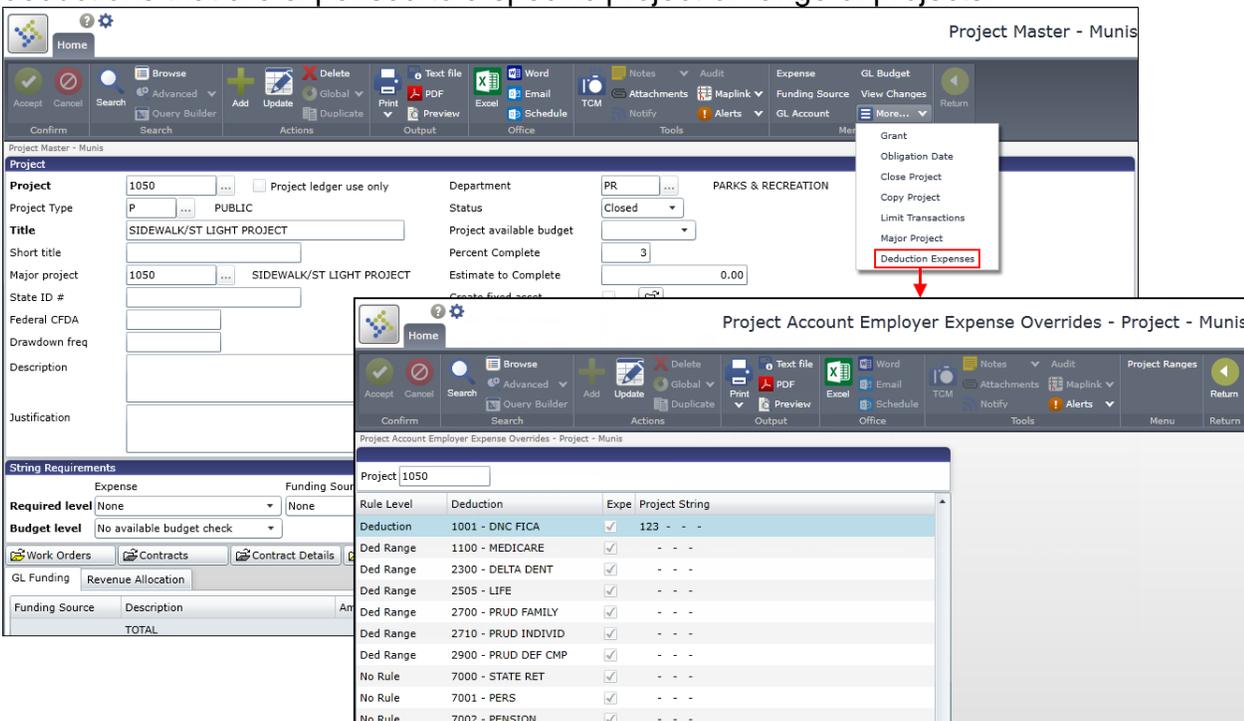
Rule Level	Deduction	Expe	Project String
This Level	1001 - DNC FICA	✓	123 - - -
Ded Range	1100 - MEDICARE	✓	- - -
Ded Range	2300 - DELTA DENT	✓	- - -
Ded Range	2505 - LIFE	✓	- - -
Ded Range	2700 - PRUD FAMILY	✓	- - -
Ded Range	2710 - PRUD INDIVID	✓	- - -
Ded Range	2900 - PRUD DEF CMP	✓	- - -
No Rule	7000 - STATE RET	✓	- - -
No Rule	7001 - PERS	✓	- - -
No Rule	7002 - PENSION	✓	- - -

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.

Salary and Benefit Projections

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	Description	Start	End
188	2014 PROJECTION	01/01/2014	12/31/2014

Change Category: BUDG - ANNUAL BUDGET PROJECTION

Partial Year Projection
 Include Inactives
 Include Benefits

Deduction Factors		
Begin	End	Factor

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

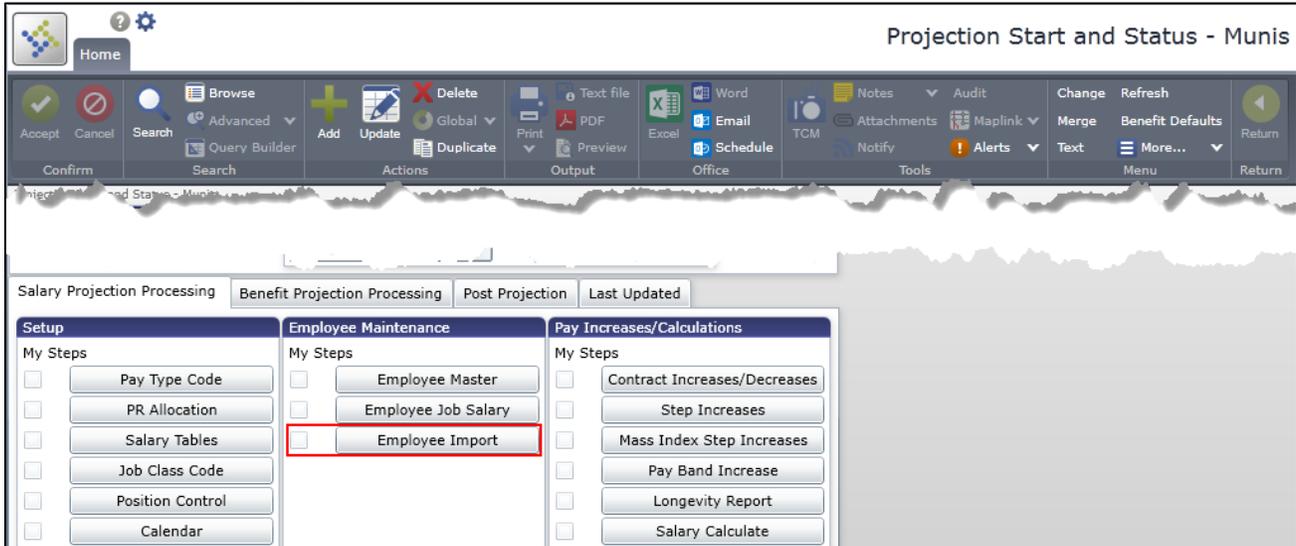
Setup | Employee Maintenance | Pay Increases/Calculations

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.

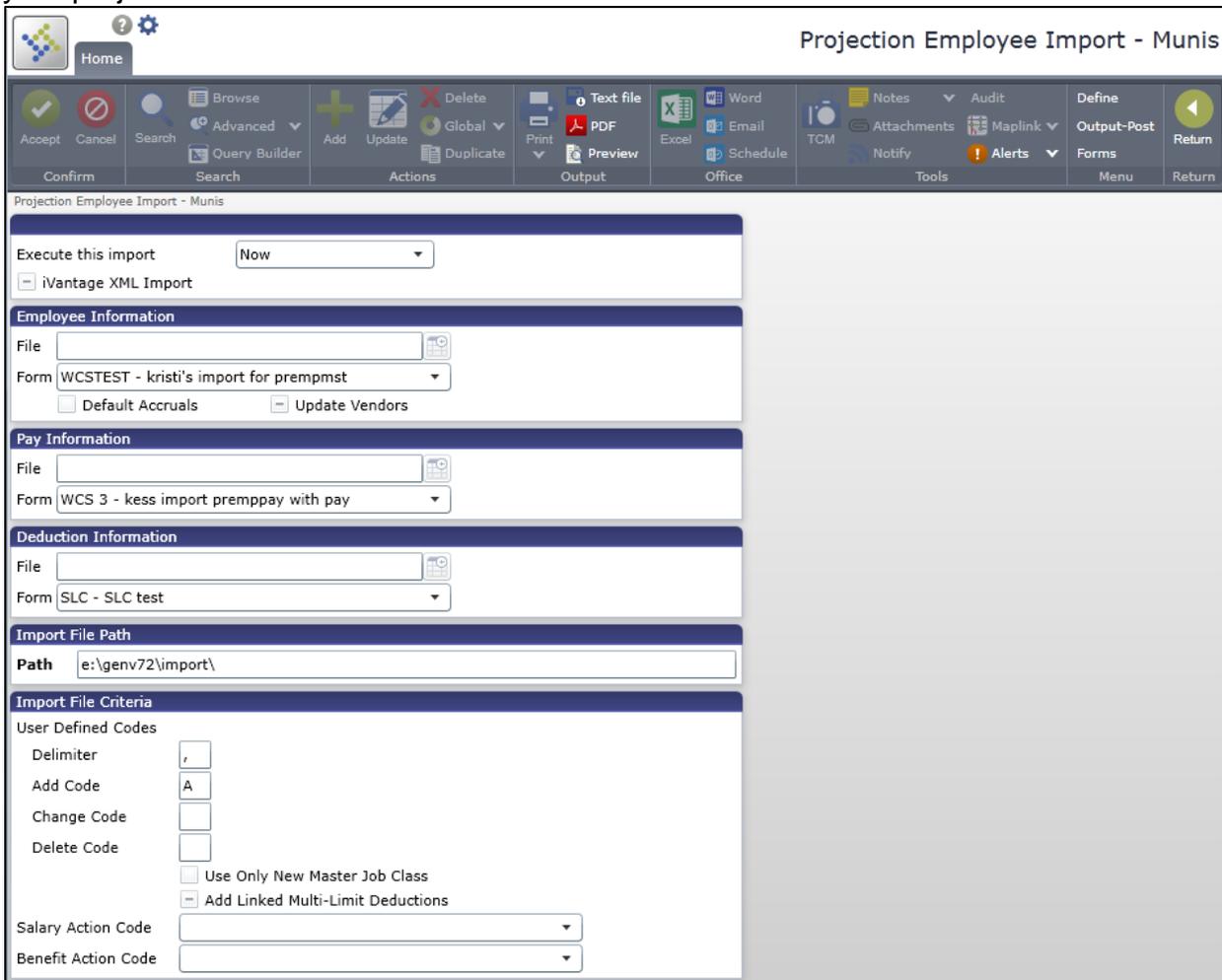
These fields are available for use only with deductions that have one of the following calc codes:

- 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.



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 'Enrollment Sections - Munis' interface. On the left, there is a sidebar with 'Benefit Year' (2014), 'Section Code' (DNTL), 'Start Date' (01/01/2014), and 'Short Description' (DENTAL). Below this, there are tabs for 'Main', 'Availability', and 'Links'. The 'Availability' tab is active, showing a list of checkboxes: 'Always Available' (checked), 'Available For Open Enrollment' (checked), 'Available For Life Events' (checked), and 'Available For New Hires' (unchecked). A red box highlights the 'Always Available' checkbox, and a red arrow points from it to the 'Decline benefit | Change New Election' link in the table below.

The main content area is titled 'Benefits' and includes a warning: 'You must complete your open enrollment before 12/31/2013.' Below this, a table lists current 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 area 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 right side of the interface, there is a navigation menu with options: Home, Employee Self Service, Benefits (highlighted), Open Enrollment, Certifications, Expense Reports, Pay/Tax Information, Performance Evaluations, Personal Information, and Decision Transfer.

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 'Employee Benefits Enrollment - Munis' interface. At the top, there is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'Text file', 'Word', 'Excel', 'Email', 'Schedule', 'Notes', 'Attachments', 'MapLink', 'Alerts', 'Return', 'Generate Options', 'View Deps/Bens', 'View Options', 'Email Notification', 'View History', and 'More...'. Below the toolbar, there is a form for 'Employee Identification' with fields for 'Employee', 'SSN', 'Last Name', 'First Name', 'MI', and 'Status'. There are also dropdown menus for 'Location' and 'Group/BU'. The 'Group/BU' dropdown is highlighted with a red box, and the 'Changes to Current Benefits' option is selected and highlighted with a red box. Below the form, there is a section for 'Elections' with 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	SSN	Last Name	First Name	MI	Status
166355	001-11-1122	LEVESQUE	CECILE		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.

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 ESS interface. At the top left is the Tyler Technologies logo. At the top right, the user name 'HIGGINS, SEAN' and 'Resources' are displayed. Below the header is a navigation menu with '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.

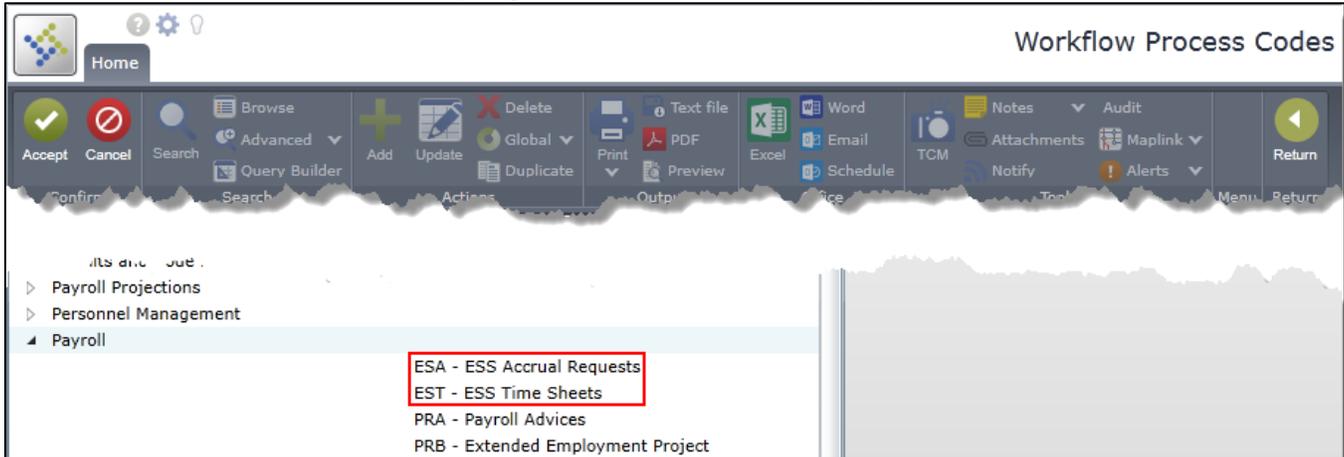
The screenshot shows the 'Approve time off for LEVESQUE, MARY ACCOUNTANT II' screen. At the top, it says 'Approving 0 out of 52.00 from 7/22/2013 to 7/30/2013'. There are buttons for 'Back', 'Mark all as approved', 'Edit', and 'Submit'. Below this is a calendar grid for the week of 7/22 to 7/27. The grid shows 'HOURLY TIME' for Monday (8), Tuesday (8), and Wednesday (8), with a total of 24 hours for the week. Below the grid, there are fields for 'Days 8', 'Project ledger account', and 'General ledger account 1000-0-000-000-00-00-0000-0-2010 -'. There are also buttons for 'Approve', 'Reject', 'Forward to' (set to Delina Hill), 'Hold', and a 'Comments' field.

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

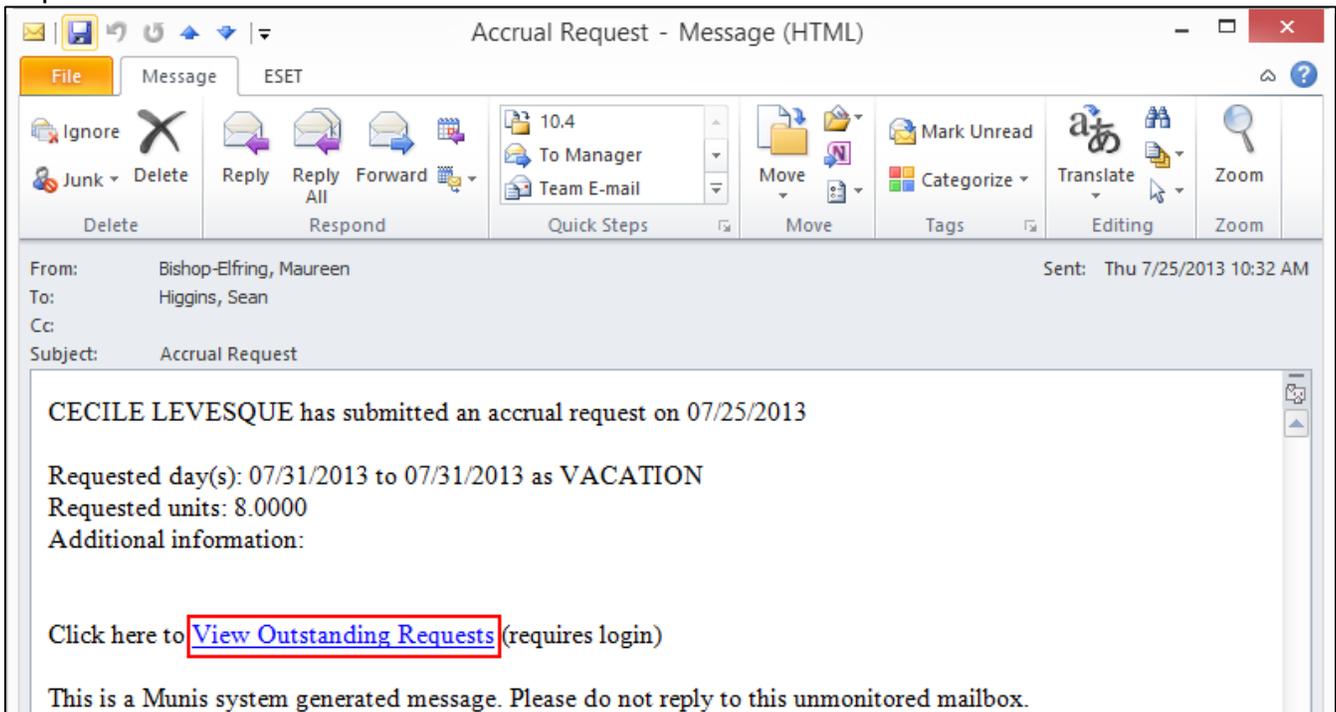
The Employee Self Service (ESS) accrual and time sheet approval processes have been updated to accommodate the Munis Workflow functionality.

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"/>					

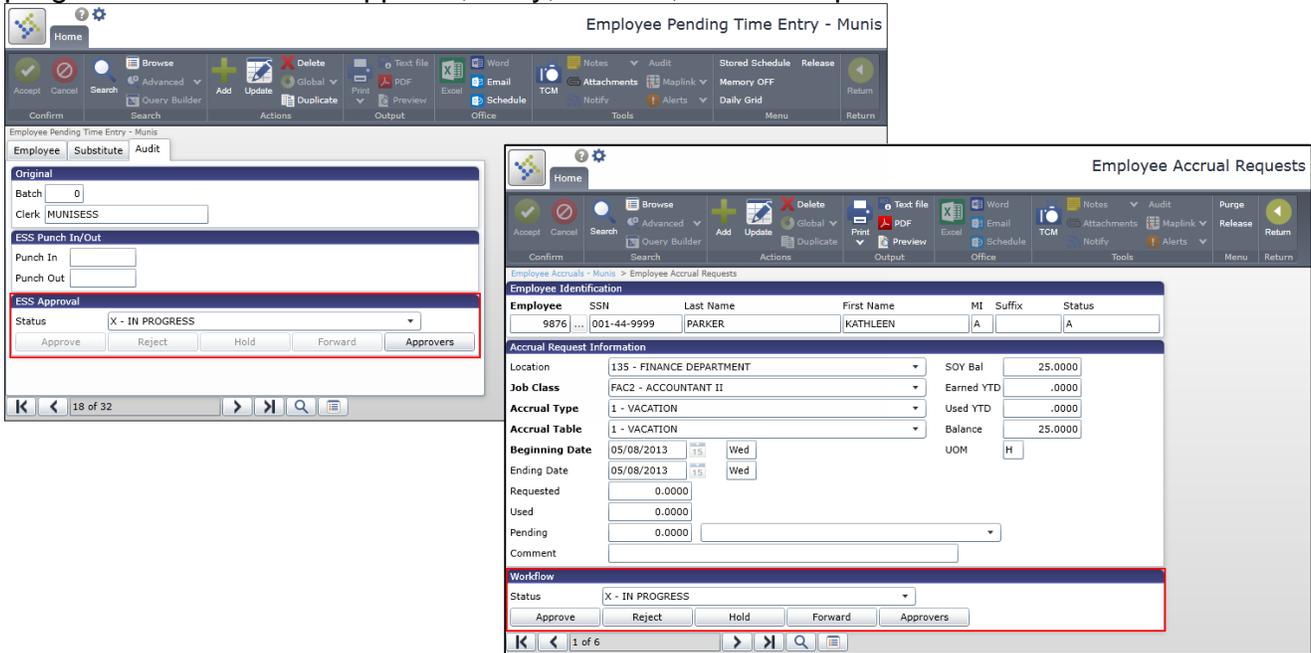
PARKER, KATHLEEN A : ACCOUNT II

	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.

The screenshot shows the 'Employee Add Wizard' interface. At the top right, it says 'Employee Add Wizard' and 'Welcome, Sean Higgins'. Below this is a progress bar with steps: Applicant, Contact, Demographics, Employment, SalaryTax, Confirmation, and Finished. The 'Contact' step is currently selected. Below the progress bar, there are two dropdown menus: 'Action Code' set to 'NEW HIRE' and 'Reason Code' set to 'NEW POSITION'. Below these are several input fields: 'Action Effective Date' (8/1/2013), 'First Name', 'Last Name', 'Middle Name', 'Suffix', 'MI', 'SSN', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Home Phone', 'Country', 'Email', and 'Alt Email'. There are also 'Help' and 'Restart' buttons at the bottom.

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

View/Maintain: Job Classes, Salary Tables, Encumbering, Index Steps

Office: Excel, Reports, Setup

Positions (1)

1	HEAD ACCOUNTANT	Group/BU	NON UNION	Employee	VACANT
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 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

Project Allocation ALLOC

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.