



## Munis Human Resources and Payroll

---

*Major Enhancements  
Version 10.5  
April 21, 2014*

## TABLE OF CONTENTS

<b>Munis Human Resources and Payroll.....</b>	<b>4</b>
Attachments, Tyler Content Manager.....	4
<b>Human Resources.....</b>	<b>8</b>
360° Evaluations.....	8
360 Type .....	8
Default Forms for 360° Evaluation Types.....	9
ESS Performance Evaluations.....	10
Employee Evaluation Records.....	11
Benefits Enrollment.....	12
Marital Enrollment Restrictions .....	12
Dependent Requirements .....	13
Enrollment Period Costs .....	14
Cafeteria Plan Premium Amounts.....	15
Employee Master First and Last Name Fields.....	16
Employee Inquiry Quick History .....	17
Employee Master User Defined Codes .....	19
Applicant Master Custom Datatype Codes .....	20
Job Opening Restrictions .....	20
<b>Payroll .....</b>	<b>23</b>
Accruals.....	23
Accrual Factoring.....	23
Accrual Loans .....	24
GL Rollups for ESS.....	25
Mass Salary Change .....	26
Pay Type Limit Rules.....	29
Payroll Control Settings .....	30
<b>Employee Self Service .....</b>	<b>31</b>
Benefits Enrollment Paycheck Simulator .....	31

Employment Opportunities.....	32
Incomplete Job Applications .....	32
Employment Opportunities Page .....	35
Life Event Documentation .....	38
Time Entry .....	40

# Munis Human Resources and Payroll

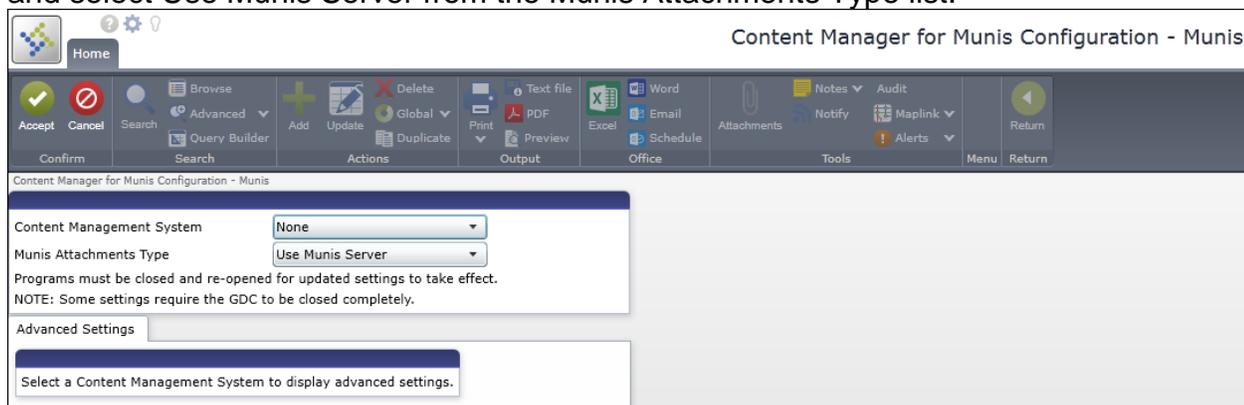
This document provides an overview of the major HR/Payroll enhancements for Munis® Version 10.5.

## Attachments, Tyler Content Manager

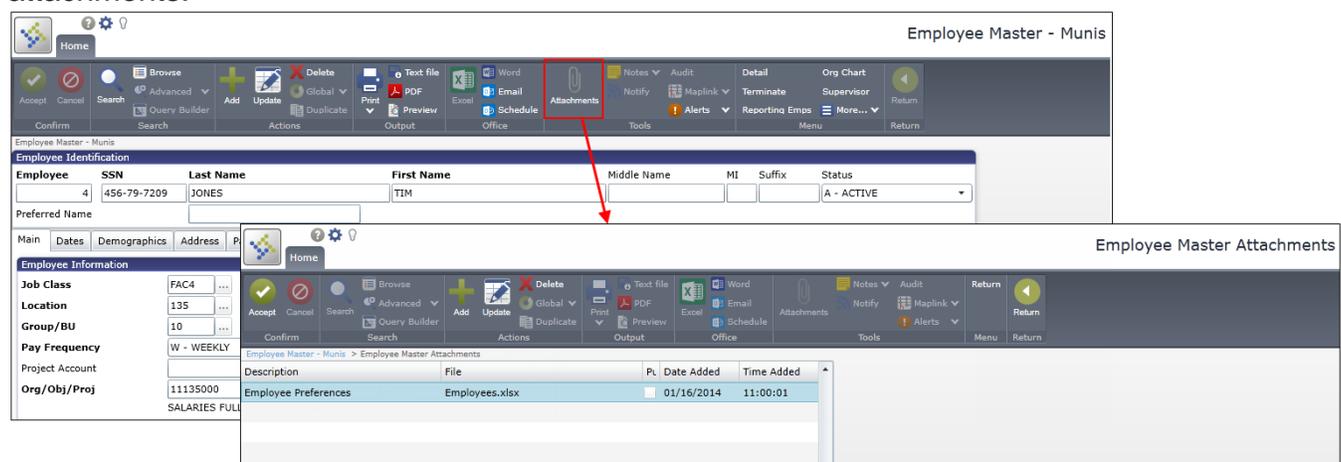
In the Tools group of the ribbon, the TCM  button is removed and the Attachments  button is the single option for attaching and storing documents in Munis.

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

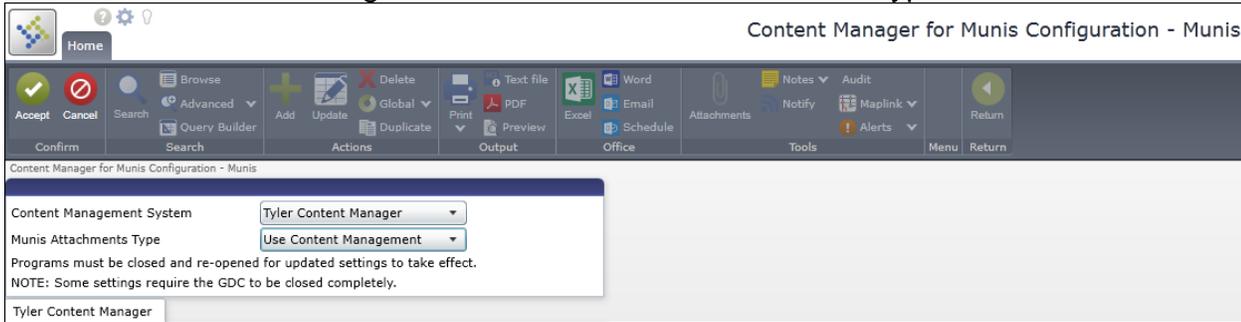
To use the standard Munis attachments screen and store documents on your Munis server, in the TylerCM for Munis Settings program, select None from the Content Manager System list and select Use Munis Server from the Munis Attachments Type list.



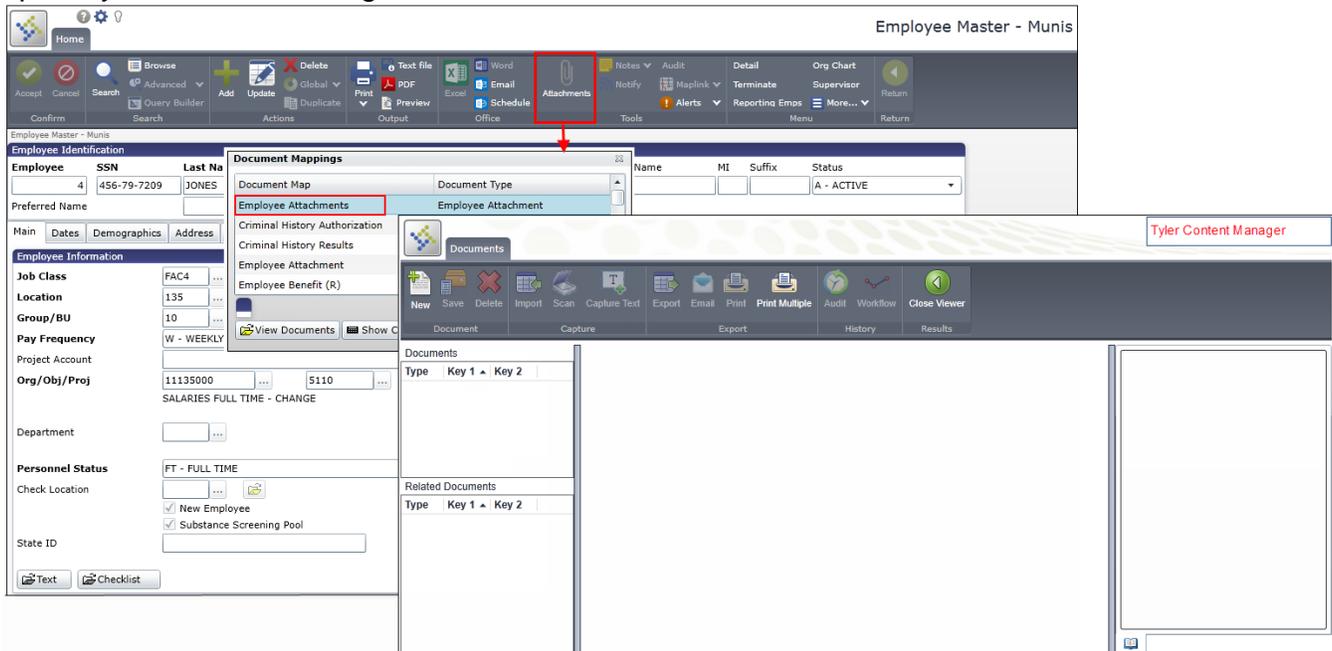
In this case, when you click Attachments in the ribbon, the program displays the standard Munis Attachments screen, where you can attach new document files or maintain existing attachments.



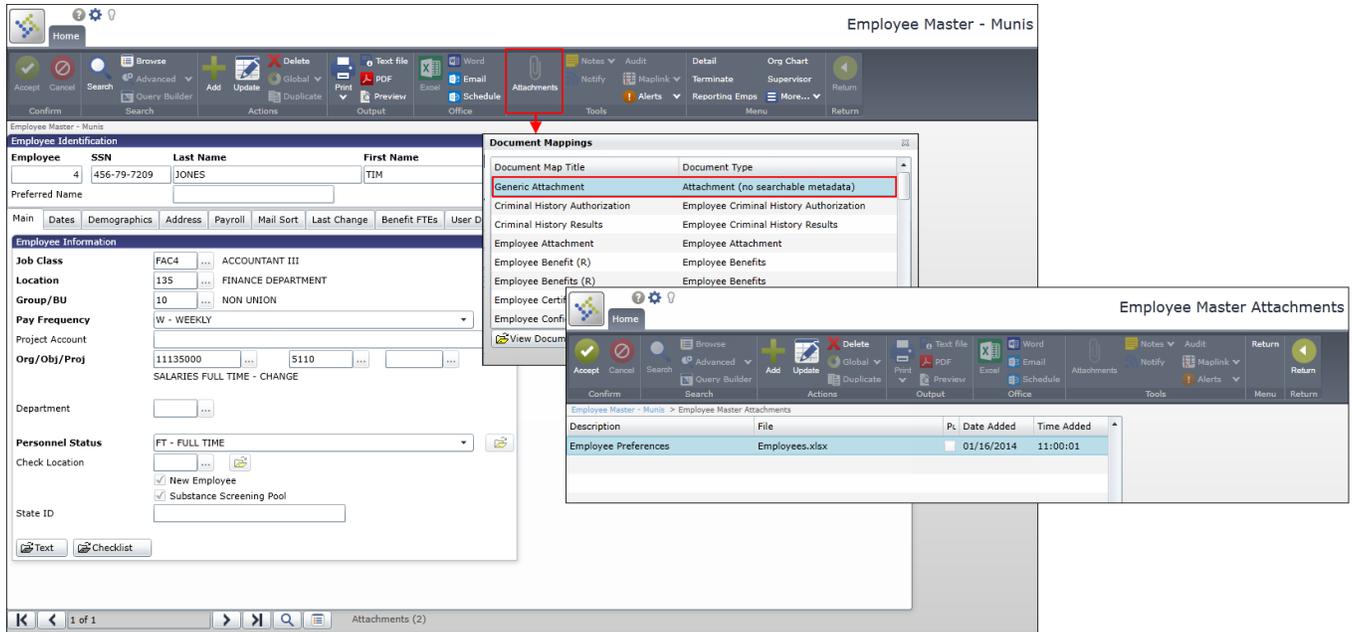
To use Tyler Content Manager to store and retrieve documents, in the TylerCM for Munis Settings program, select Tyler Content Manager from the Content Manager System list and select Use Content Management from the Munis Attachments type list.



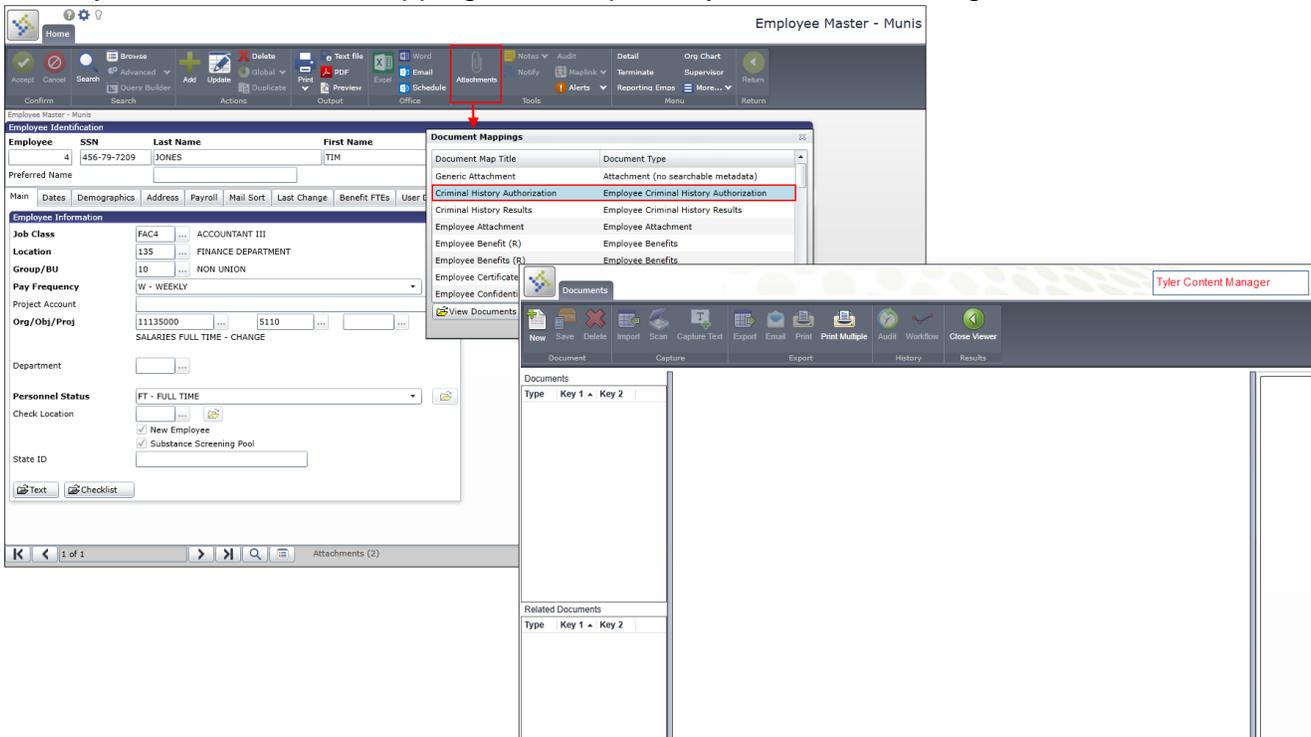
In this case, when you click Attachments, Munis provides the Document Mappings box. Double-click a document map type or highlight a document map and click View Documents to open Tyler Content Manager.



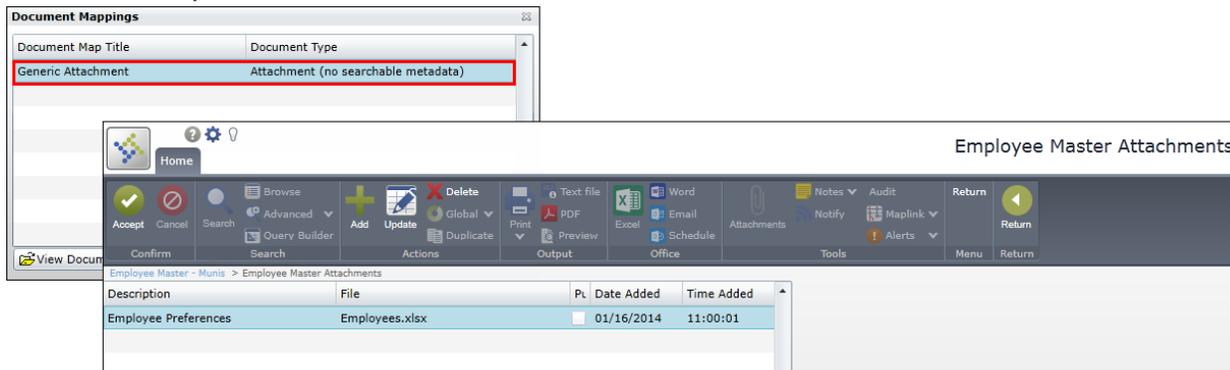
If your organization uses Tyler Content Manager and in the TylerCM for Munis Settings program, the value of the Content Manager System list is Tyler Content Manager and the value of the Munis Attachment Type list is Use Munis Server, when you click Attachments, the Munis program displays the Document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



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



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



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

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

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

# Human Resources

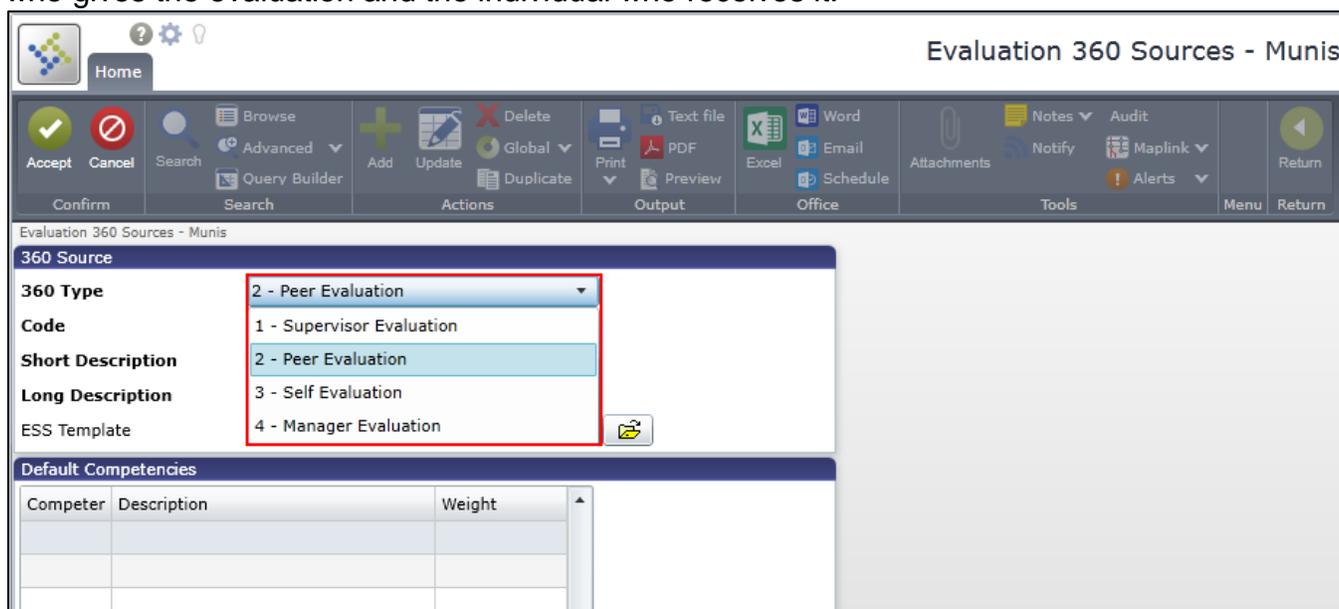
The following changes apply to Munis Human Resources programs.

## 360° Evaluations

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

### 360 Type

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

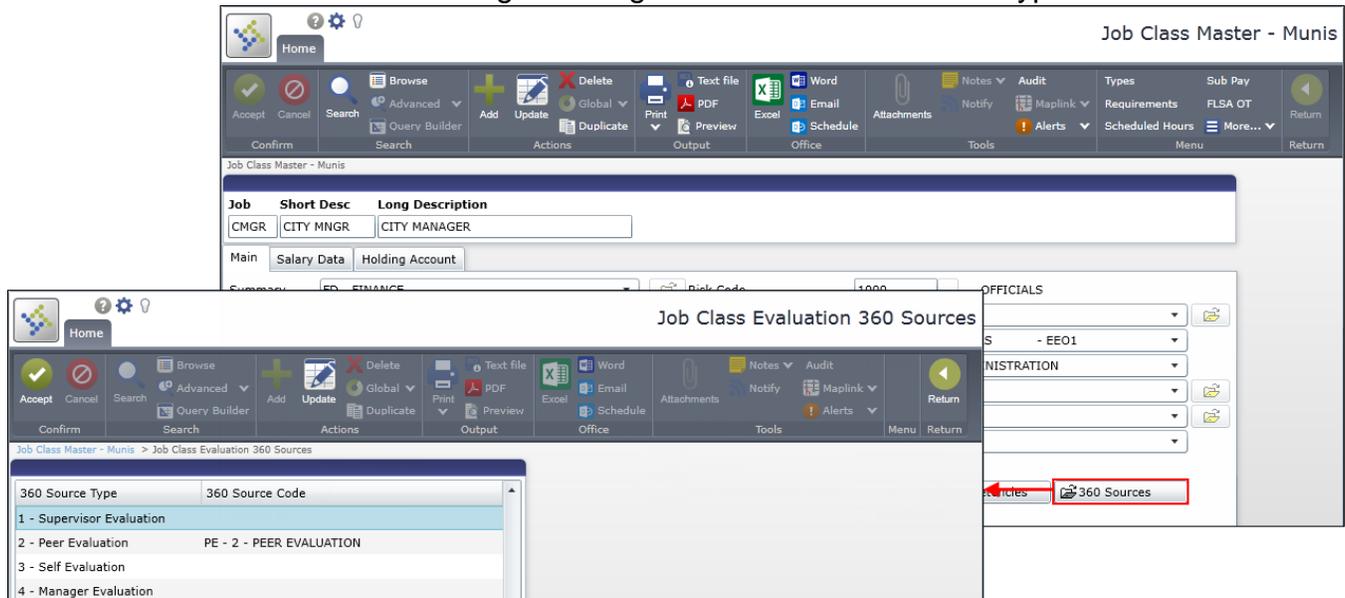


Type	Evaluates
1 – Supervisor	A subordinate
2 – Peer Evaluation	Employees with the same supervisor
3 – Self Evaluation	Yourself
4 – Manager Evaluation	Your supervisor

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

## Default Forms for 360° Evaluation Types

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

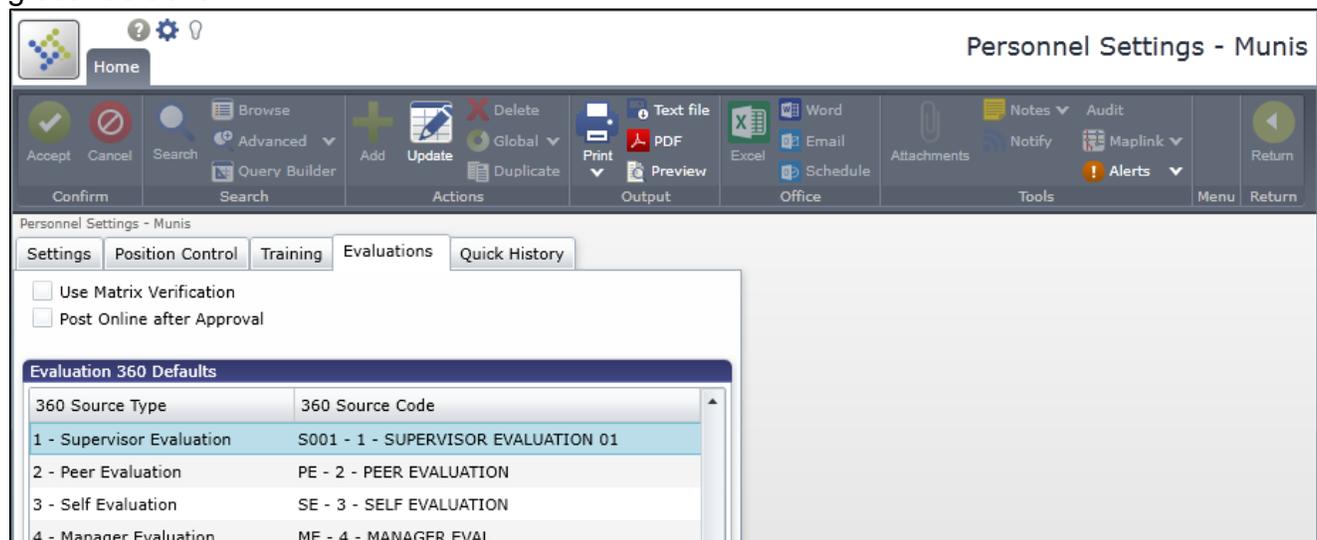


The screenshot shows the 'Job Class Master - Munis' interface. The 'Job Class Evaluation 360 Sources' window is open, displaying a table of 360 Source Types and their corresponding 360 Source Codes. The '360 Sources' button in the top right corner of the window is highlighted with a red box and an arrow.

360 Source Type	360 Source Code
1 - Supervisor Evaluation	
2 - Peer Evaluation	PE - 2 - PEER EVALUATION
3 - Self Evaluation	
4 - Manager Evaluation	

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

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

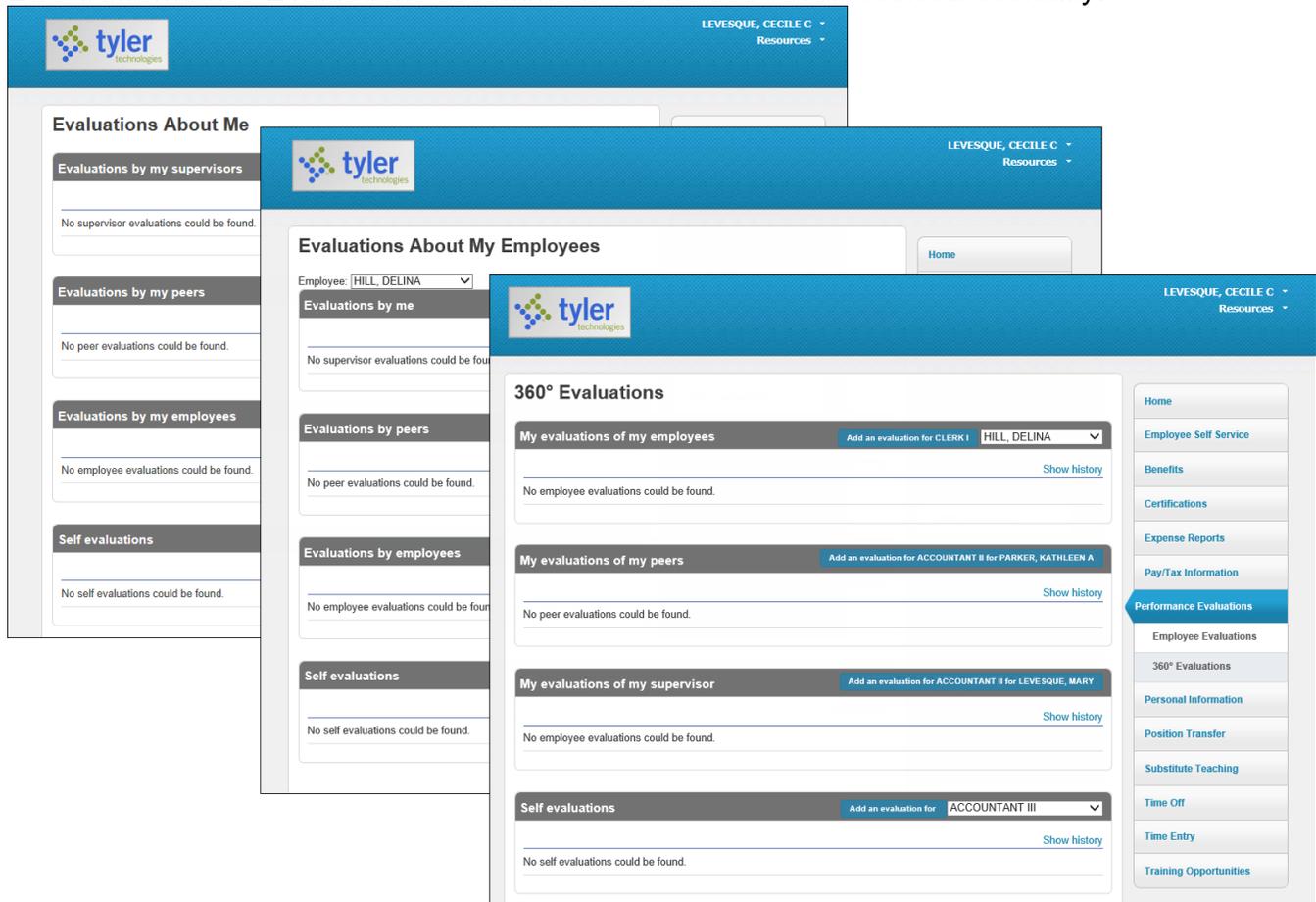


The screenshot shows the 'Personnel Settings - Munis' interface. The 'Evaluations' tab is selected, and the 'Evaluation 360 Defaults' table is visible. The table shows the global default source codes for each evaluation type.

360 Source Type	360 Source Code
1 - Supervisor Evaluation	S001 - 1 - SUPERVISOR EVALUATION 01
2 - Peer Evaluation	PE - 2 - PEER EVALUATION
3 - Self Evaluation	SE - 3 - SELF EVALUATION
4 - Manager Evaluation	ME - 4 - MANAGER EVAL

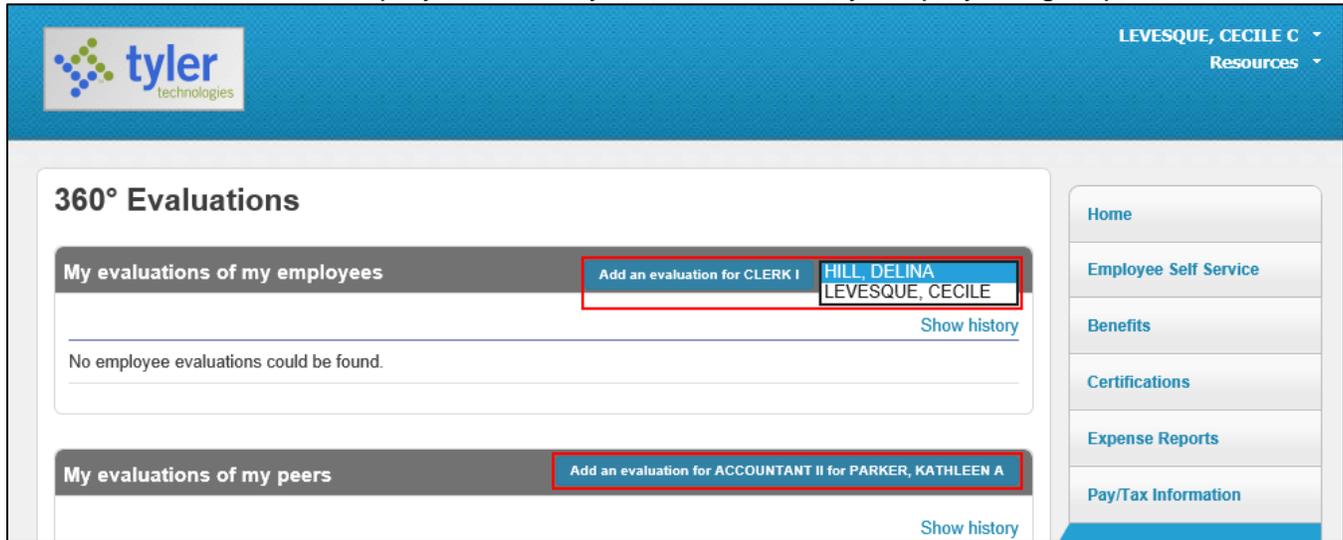
## ESS Performance Evaluations

ESS Performance Evaluations accommodates the 360° evaluation functionality.



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

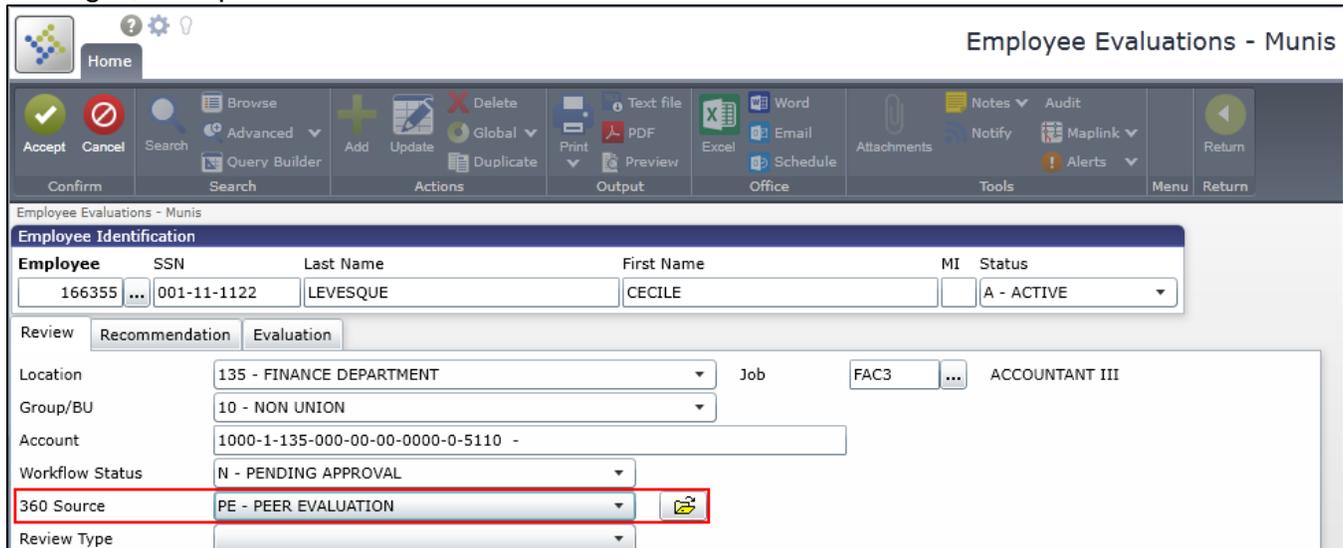
If you have permission to perform an evaluation, the header for the pertinent group includes the Add an Evaluation For button. For example, if you have permission to perform employee evaluations, this button displays for the My Evaluations of My Employees group.



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

### Employee Evaluation Records

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

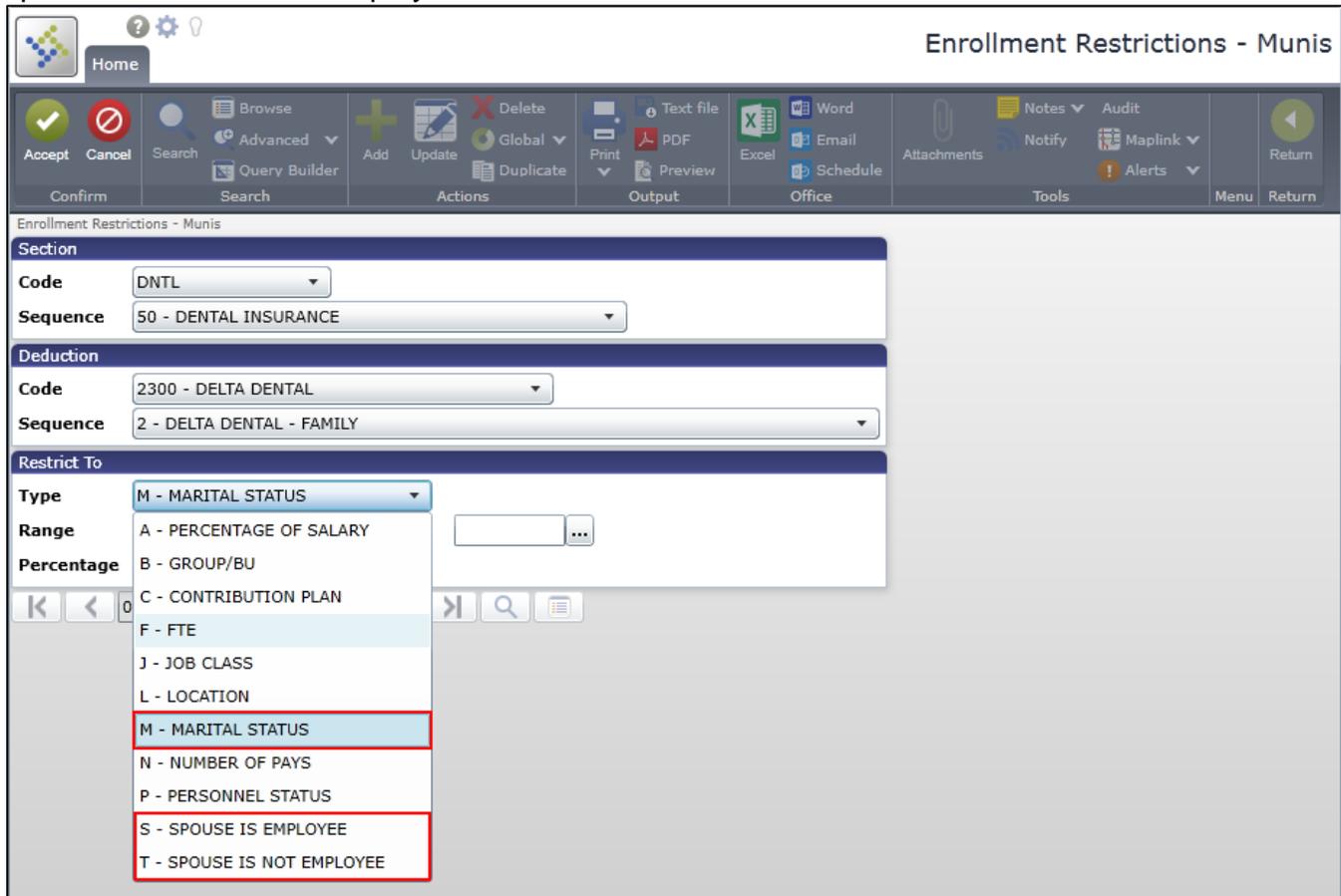


## Benefits Enrollment

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

### Marital Enrollment Restrictions

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



The screenshot shows the 'Enrollment Restrictions - Munis' interface. The 'Restrict To' section is expanded, showing a list of options for the 'Type' field. The options are:

- M - MARITAL STATUS
- N - NUMBER OF PAYS
- P - PERSONNEL STATUS
- S - SPOUSE IS EMPLOYEE
- T - SPOUSE IS NOT EMPLOYEE

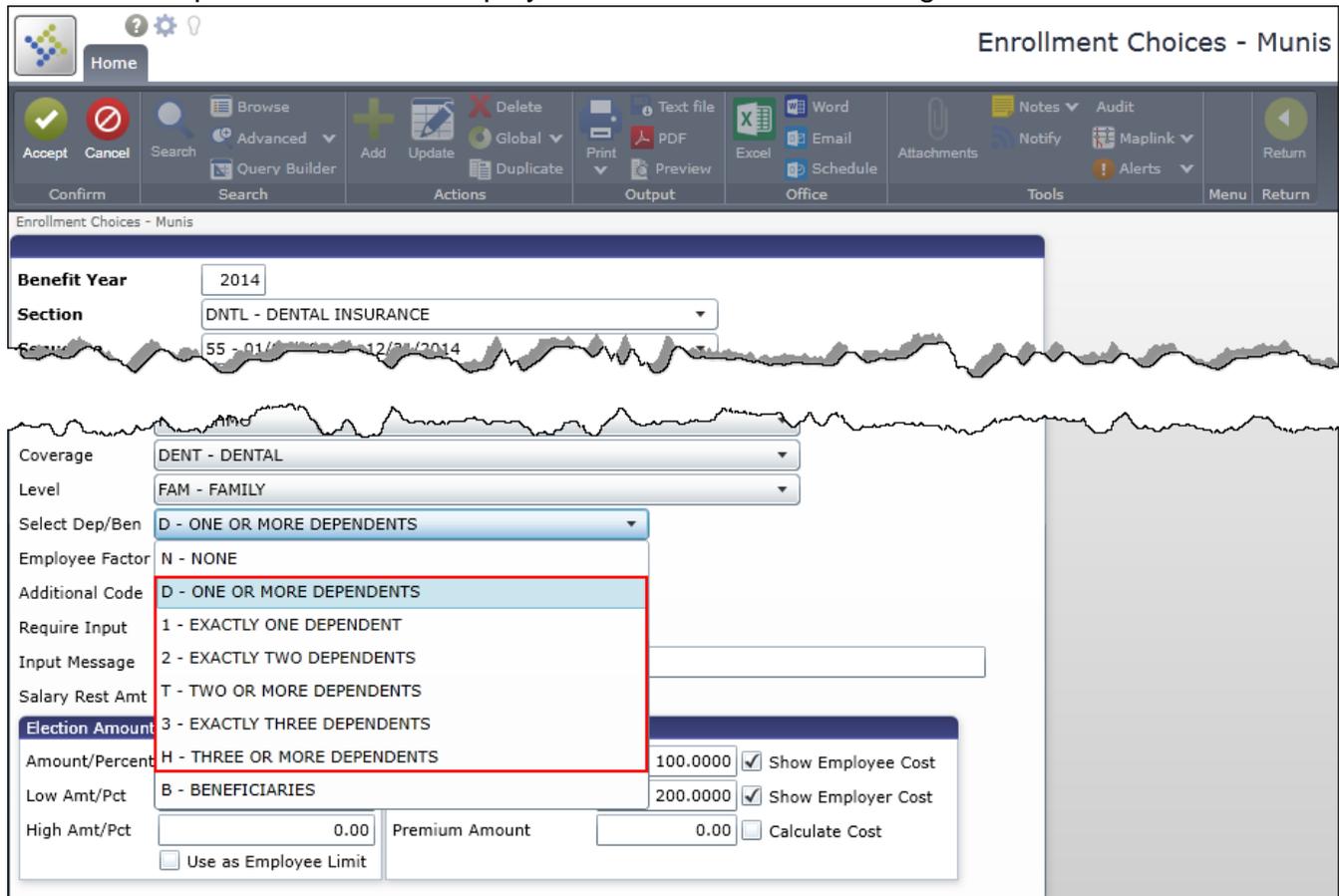
The 'M - MARITAL STATUS' and 'S - SPOUSE IS EMPLOYEE' options are highlighted with red boxes. The 'Range' and 'Percentage' fields are also visible, with 'Range' set to 'A - PERCENTAGE OF SALARY' and 'Percentage' set to 'B - GROUP/BU'.

For example:

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

## Dependent Requirements

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



The screenshot shows the 'Enrollment Choices - Munis' interface. At the top, there is a navigation bar with a 'Home' button and a search bar. Below this is a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Query Builder', 'Add', 'Update', 'Duplicate', 'Print', 'PDF', 'Preview', 'Excel', 'Word', 'Email', 'Schedule', 'Attachments', 'Notes', 'Audit', 'Notify', 'Maplink', 'Alerts', and 'Return'. The main content area is titled 'Enrollment Choices - Munis' and contains several form fields:

- Benefit Year:** 2014
- Section:** DNTL - DENTAL INSURANCE
- Section:** 55 - 01/12/2014
- Coverage:** DENT - DENTAL
- Level:** FAM - FAMILY
- Select Dep/Ben:** D - ONE OR MORE DEPENDENTS (This dropdown is open, showing a list of options: D - ONE OR MORE DEPENDENTS, 1 - EXACTLY ONE DEPENDENT, 2 - EXACTLY TWO DEPENDENTS, T - TWO OR MORE DEPENDENTS, 3 - EXACTLY THREE DEPENDENTS, and H - THREE OR MORE DEPENDENTS. The 'D - ONE OR MORE DEPENDENTS' option is highlighted with a red box.)
- Employee Factor:** N - NONE
- Additional Code:** D - ONE OR MORE DEPENDENTS
- Require Input:** 1 - EXACTLY ONE DEPENDENT
- Input Message:** 2 - EXACTLY TWO DEPENDENTS
- Salary Rest Amt:** T - TWO OR MORE DEPENDENTS
- Election Amount:** 3 - EXACTLY THREE DEPENDENTS
- Amount/Percent:** H - THREE OR MORE DEPENDENTS, 100.0000,  Show Employee Cost
- Low Amt/Pct:** B - BENEFICIARIES, 200.0000,  Show Employer Cost
- High Amt/Pct:** 0.00, Premium Amount: 0.00,  Calculate Cost
- Use as Employee Limit

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

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

### Enrollment Period Costs

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

DENTAL INSURANCE	
ELECTION - DENTAL INDIVIDUAL PLAN	
Pay Period Employee Cost	\$50.00
Pay Period Employer Cost	\$100.00
Annual Employee Cost	\$600.00
Annual Employer Cost	\$1,200.00

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

**Benefits**  
DENTAL INSURANCE

DENTAL FAMILY PLAN  
Annual Costs: Employee Cost \$1,200.00 / Employer Cost \$2,400.00  
Pay Period Costs: Employee Cost \$100.00 / Employer Cost \$200.00

DENTAL INDIVIDUAL PLAN  
Annual Costs: Employee Cost \$600.00 / Employer Cost \$1,200.00  
Pay Period Costs: Employee Cost \$50.00 / Employer Cost \$100.00

I Decline

**Continue** **Cancel**

### Cafeteria Plan Premium Amounts

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

**Enrollment Choices - Munis**

Benefit Year: 2014  
Section: LIFE - LIFE INSURANCE  
Sequence: 57 - 01/01/2014 to 12/31/2014  
Deduction: 2200 - CALC CODE 19 -- LIFE INS TABLE  
Effective Date: 01/01/2014  
Description: 2014 LIFE INSURANCE

Calculate Cost

**Open Enrollment**

Make a selection for each benefit, then click "Continue". You must submit this enrollment by 12/31/2014.

Benefit	Current Election	New Election	
CAFETERIA PLAN	No Election Made	CAFETERIA PLAN Contribution: \$15,000.00   details	<a href="#">Change New Election</a>
DENTAL INSURANCE	No Election Made	Declined	<a href="#">Change New Election</a>
HEALTH INSURANCE	No Election Made	Declined	<a href="#">Change New Election</a>
LIFE INSURANCE	No Election Made	2014 LIFE INSURANCE Premium: \$367.20   details	<a href="#">Decline benefit</a>   <a href="#">Change New Election</a>

**Cost Information**

Amount/Percent	Employee Amount	Employer Amount	Premium Amount	Number of Deductions
A - AMOUNT-BASED	0.0000	0.0000	0.00	0
Low Amt/Pct	0.00	0.0000		
High Amt/Pct	60,000.00			

**Open Enrollment Details:**

Item	Amount
Premium	\$367.20
Employee Cost	\$259.20
Employer Cost	\$108.00
Election amount	\$60,000.00

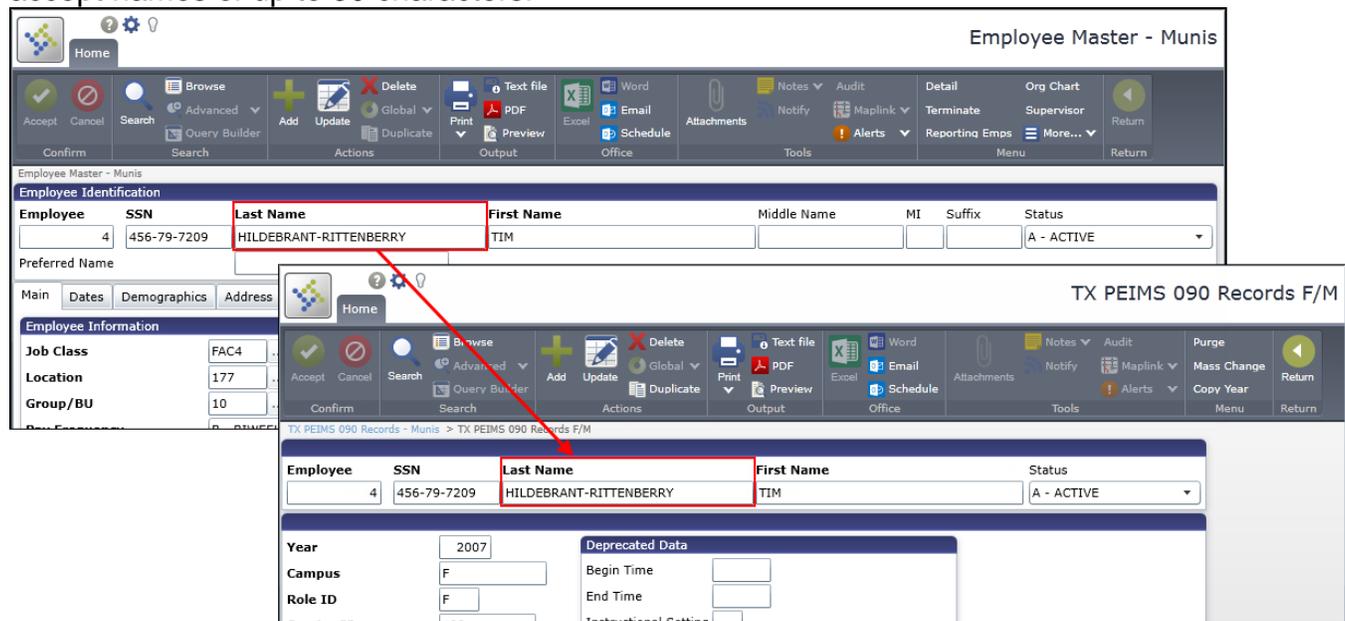
The functionality supports cafeteria plans when deductions use calc codes that use a premium table or life insurance table. As a result, when you select this check box for a benefit choice

connected to a table, the premium amount is calculated for each individual user and subtracted from cafeteria amount total.

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

## Employee Master First and Last Name Fields

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

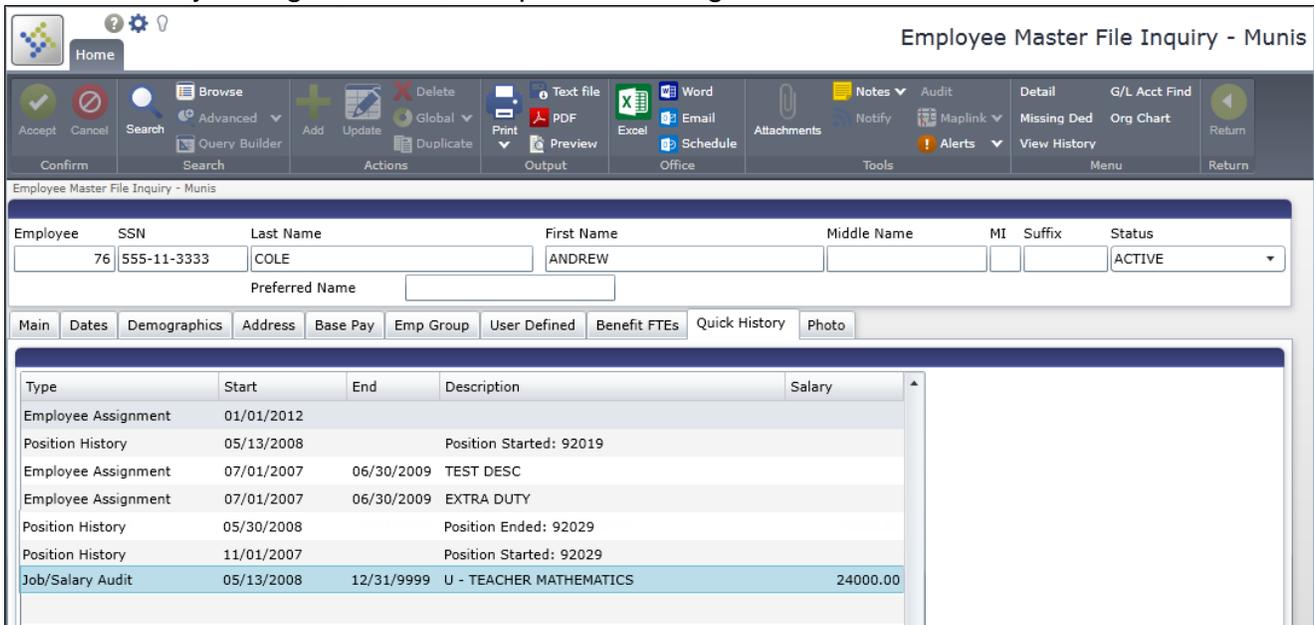


The image shows two overlapping screenshots of software interfaces. The top screenshot is titled 'Employee Master - Munis' and shows an 'Employee Identification' form with fields for Employee, SSN, Last Name (highlighted with a red box), First Name, Middle Name, MI, Suffix, and Status. The bottom screenshot is titled 'TX PEIMS 090 Records F/M' and shows a similar form with the same fields. A red arrow points from the 'Last Name' field in the top screenshot to the 'Last Name' field in the bottom screenshot, demonstrating that the data is consistent across different programs.

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

## Employee Inquiry Quick History

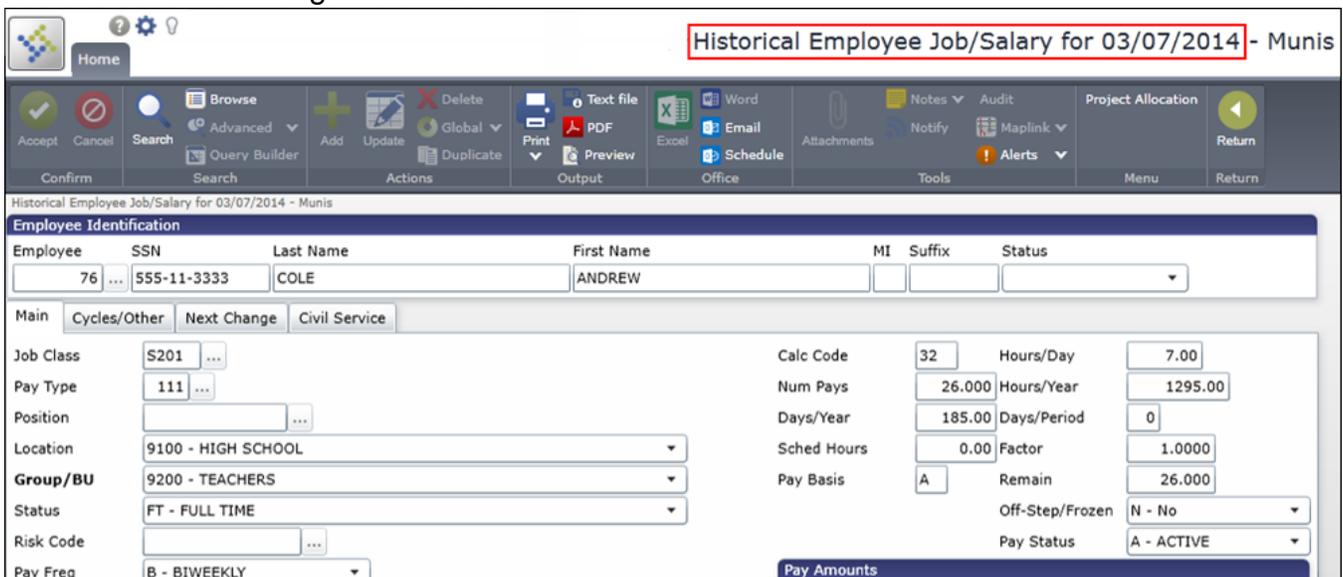
The Quick History tab in the Employee Inquiry program displays an overview of changes that have been made to the employee's records over time. The tab can be configured to include actions history changes, audits, and position changes.



The screenshot shows the 'Employee Master File Inquiry - Munis' application. The 'Quick History' tab is selected, displaying a table of historical changes:

Type	Start	End	Description	Salary
Employee Assignment	01/01/2012			
Position History	05/13/2008		Position Started: 92019	
Employee Assignment	07/01/2007	06/30/2009	TEST DESC	
Employee Assignment	07/01/2007	06/30/2009	EXTRA DUTY	
Position History	05/30/2008		Position Ended: 92029	
Position History	11/01/2007		Position Started: 92029	
Job/Salary Audit	05/13/2008	12/31/9999	U - TEACHER MATHEMATICS	24000.00

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



The screenshot shows the 'Historical Employee Job/Salary for 03/07/2014 - Munis' application. The 'Employee Identification' section is visible, showing the following details:

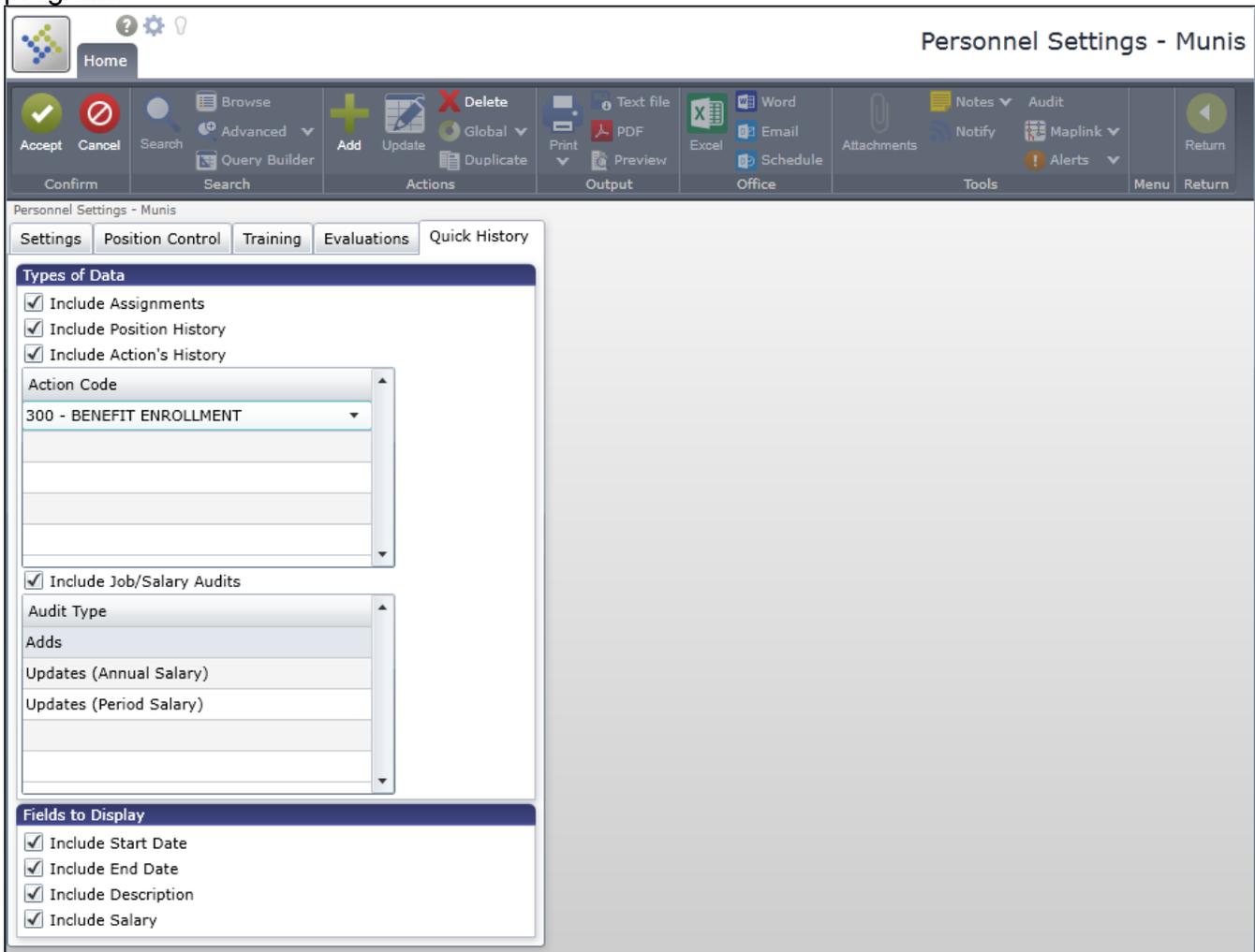
Employee	SSN	Last Name	First Name	MI	Suffix	Status
76	555-11-3333	COLE	ANDREW			ACTIVE

The 'Main' tab is selected, showing the following fields:

Job Class	S201	Calc Code	32	Hours/Day	7.00
Pay Type	111	Num Pays	26.000	Hours/Year	1295.00
Position		Days/Year	185.00	Days/Period	0
Location	9100 - HIGH SCHOOL	Sched Hours	0.00	Factor	1.0000
Group/BU	9200 - TEACHERS	Pay Basis	A	Remain	26.0000
Status	FT - FULL TIME	Off-Step/Frozen	N - No	Pay Status	A - ACTIVE
Risk Code					
Pay Freq	B - BIWEEKLY				

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

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



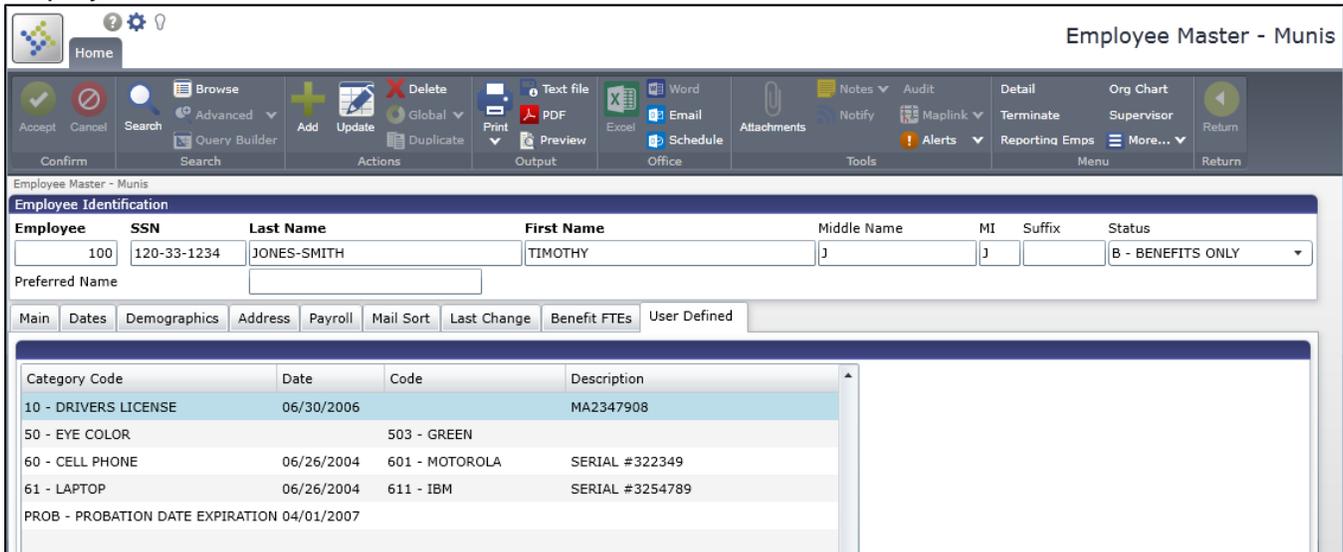
Use the check boxes to select the types of history entries provided in the list, including assignments, position history, actions history, and job/salary audits.

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

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

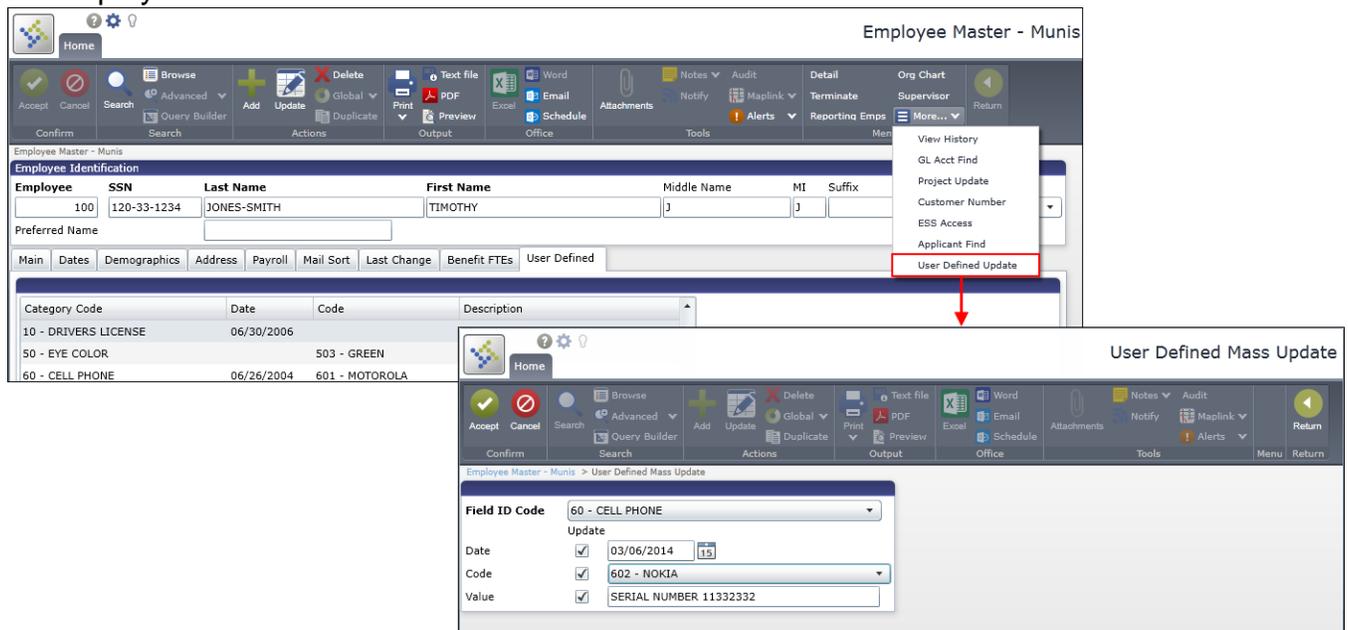
## Employee Master User Defined Codes

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



Category Code	Date	Code	Description
10 - DRIVERS LICENSE	06/30/2006		MA2347908
50 - EYE COLOR		503 - GREEN	
60 - CELL PHONE	06/26/2004	601 - MOTOROLA	SERIAL #322349
61 - LAPTOP	06/26/2004	611 - IBM	SERIAL #3254789
PROB - PROBATION DATE EXPIRATION 04/01/2007			

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



**User Defined Mass Update**

Field ID Code: 60 - CELL PHONE

Update:

Date:  03/06/2014

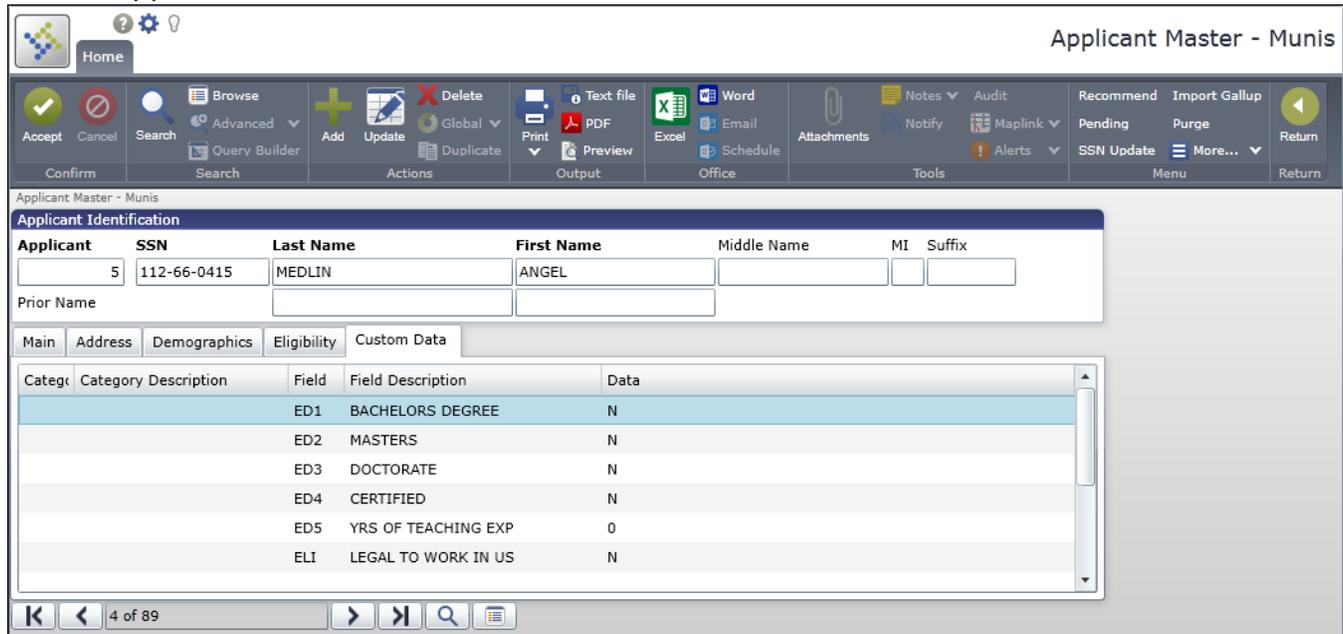
Code:  602 - NOKIA

Value:  SERIAL NUMBER 11332332

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

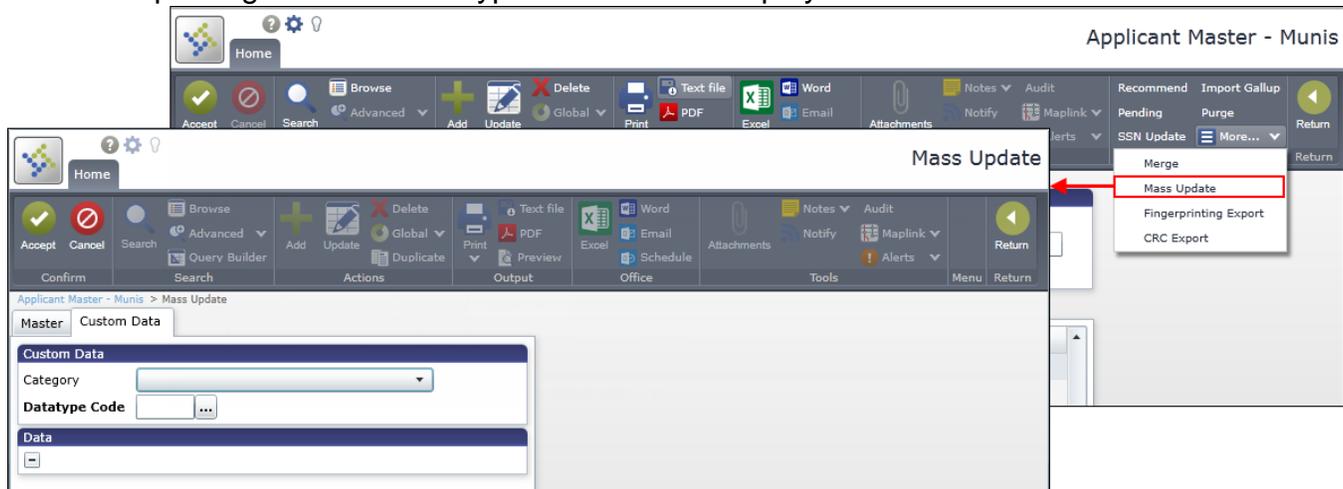
## Applicant Master Custom Datatype Codes

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



Categ	Category Description	Field	Field Description	Data
ED1	BACHELORS DEGREE			N
ED2	MASTERS			N
ED3	DOCTORATE			N
ED4	CERTIFIED			N
ED5	YRS OF TEACHING EXP			0
ELI	LEGAL TO WORK IN US			N

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

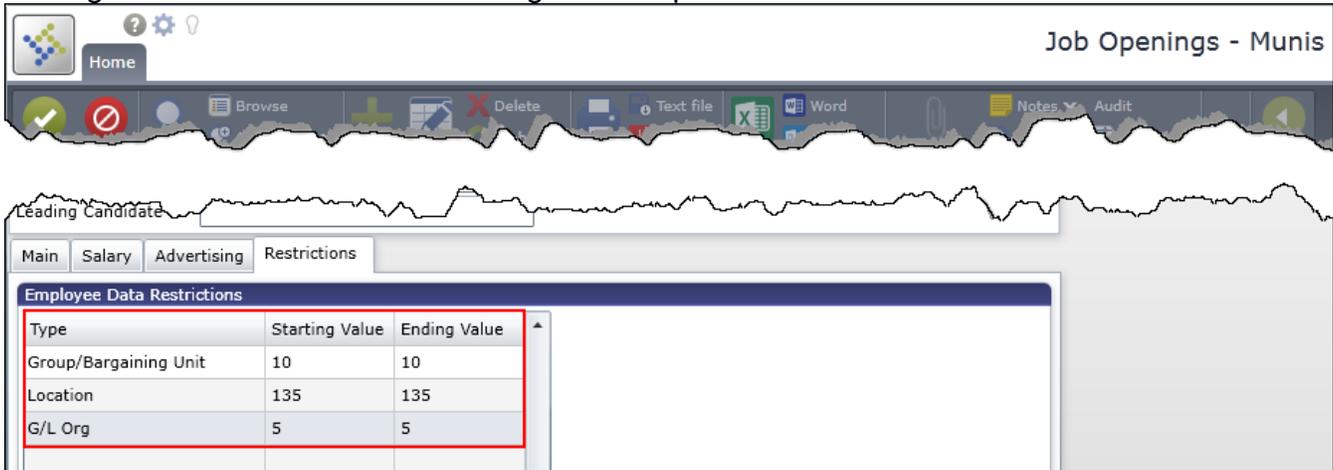


This functionality applies only to applicants who already have that code on their record. You cannot use this screen to perform a mass add or mass delete.

## Job Opening Restrictions

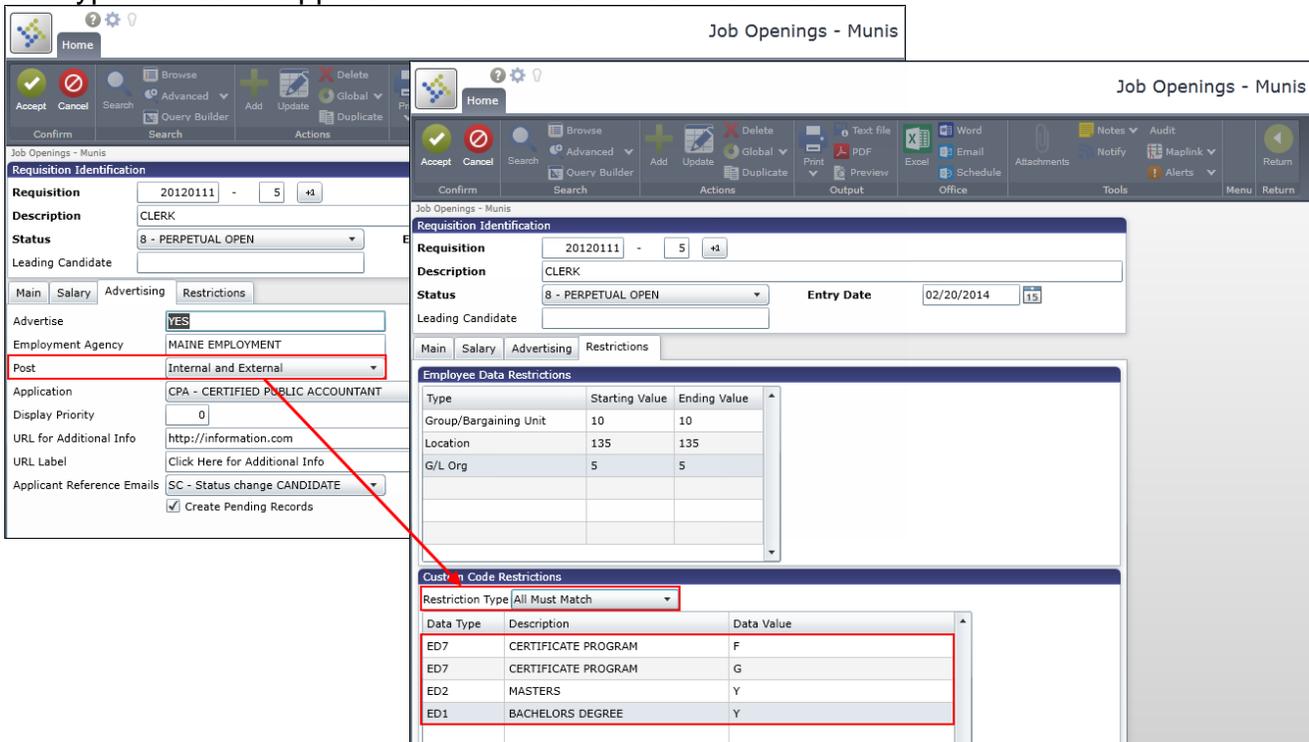
The Restrictions tab in the Job Openings program restricts which applicants can view a job opening on the Employment Opportunities page in Munis Self Service.

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



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

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



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

# Payroll

The following changes apply to Munis Payroll programs.

## Accruals

### Accrual Factoring

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

The screenshot displays the 'Employee Accruals - Munis' application interface. A dropdown menu is open, highlighting the 'Factor' option. Below, the 'Factor Accrual Hours' screen is shown with the following data:

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

The 'Employee Accrual' section shows:

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

The 'Calculated Accrual' section shows:

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

The 'Adjust Employee Accrual Records' dialog box contains the following information:

An Accrual History record will be added for

- Employee Number: 103
- Employee Job: [Blank]
- 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?

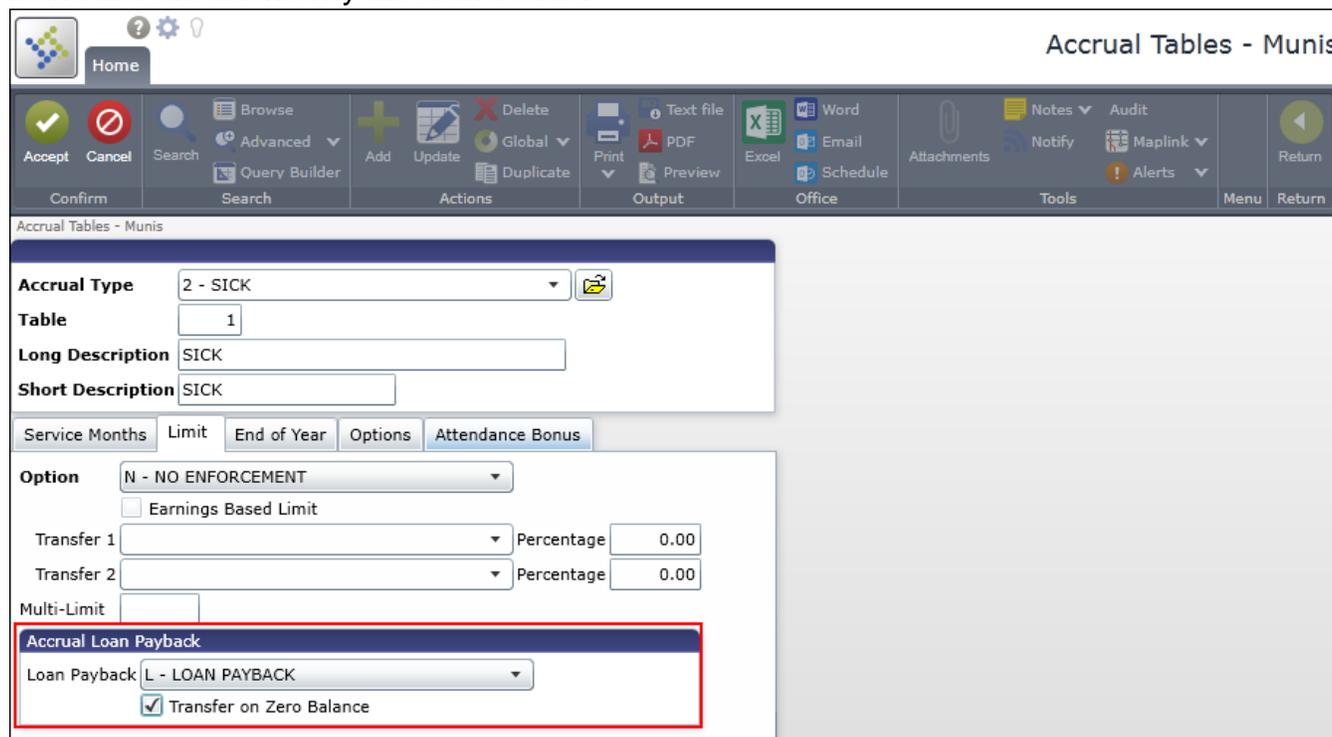
Buttons: Yes, No

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

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



The screenshot shows the 'Accrual Tables - Munis' application window. The 'Limit' tab is selected, and the 'Accrual Loan Payback' section is highlighted with a red box. The configuration details are as follows:

- Accrual Type:** 2 - SICK
- Table:** 1
- Long Description:** SICK
- Short Description:** SICK
- Option:** N - NO ENFORCEMENT
- Earnings Based Limit
- Transfer 1:** [Dropdown] **Percentage:** 0.00
- Transfer 2:** [Dropdown] **Percentage:** 0.00
- Multi-Limit:** [Input field]
- Accrual Loan Payback:**
  - Loan Payback:** L - LOAN PAYBACK
  - Transfer on Zero Balance

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

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

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

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

If this check box is selected, an employee who starts a payroll with available accrual time and earns additional accrual time at the end of the payroll would not make a payment because they have more than zero hours available. For example, an employee who starts a payroll with 5.7

hours available and earns 2.3 hours at the end of the payroll makes no payments toward the loan and carries forward an available balance of 8 hours. However, if during the next payroll, the employee uses all 8 hours in the balance and then earns another 2.3 hours at the end of the payroll, these newly earned hours are applied to the loan. This is because the employee's balance prior to earning those hours was zero.

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

**Employee Accrual History**

Employee Identification

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

Accrual Used/Earned Detail

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

## GL Rollups for ESS

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

**Location Codes - Munis**

GL Rollups

**Payroll GL Rollups - Munis**

Location Code: 135  
 Short Desc: FINANCE  
 Long Desc: FINANCE DE

Details: ESS Options

Local Tax Deduction: 0  
 Local Tax Pay: 0  
 Payroll Entity Code: 1 - CITY  
 Non Payroll/O

Payroll GL Rollups - Munis

Rollup Summary

Rollup Code: 132  
 Description: GL ROLLUPS

Rollup Detail

Account
1000-1-135-00

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

The screenshot displays three overlapping windows from the Tyler Technologies system:

- Payroll GL Rollups - Munis:** Shows a 'Rollup Summary' with 'Rollup Code 132' and 'Description: GL ROLLUPS'. The 'Account' field is set to '1000-1-135-00'.
- Location Codes - Munis:** Shows 'Location Code 135' with 'Short Desc: FINANCE' and 'Long Desc: FINANCE DEPARTMENT'. Under 'ESS Options', 'ESS Time Entry GL' is set to '132'.
- Enter time:** Shows a calendar for Dec 2013 and Feb 2014. The 'General ledger account' dropdown is set to '11135000-5110 (SALARIES FULL TIME - CHANGE)'. A red arrow points from the 'ESS Time Entry GL' field in the Location Codes window to this dropdown.

## Mass Salary Change

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

The screenshot shows the 'Mass Salary Change' program interface with the following sections:

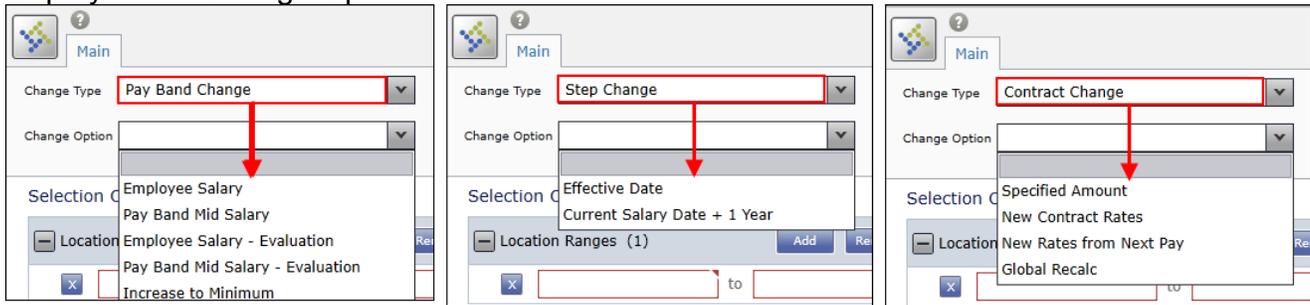
- Change Type:** A dropdown menu.
- Change Option:** A dropdown menu.
- Selection Criteria:** A list of criteria with 'Add' buttons: Location Ranges (0), Organization Ranges (0), Group Ranges (0), Job Ranges (0), Position Ranges (0), Pay Ranges (0), and Calendar Ranges (0).
- Salary Change Criteria:**
  - Minimum Days Eligibility:** Fields for Days Worked, Year, and Eligibility Method.
  - Minimum Hours Eligibility:** Fields for Hours Worked, Step Threshold, and Hours Over Threshold.
  - Additional Eligibility Criteria:** Fields for Started Job Before and Next Date.
  - Effective Date:** A date field set to 2/20/2014.
  - Action History Code:** A dropdown menu.
  - Include Inactive Employees:** A checkbox.

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



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

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



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

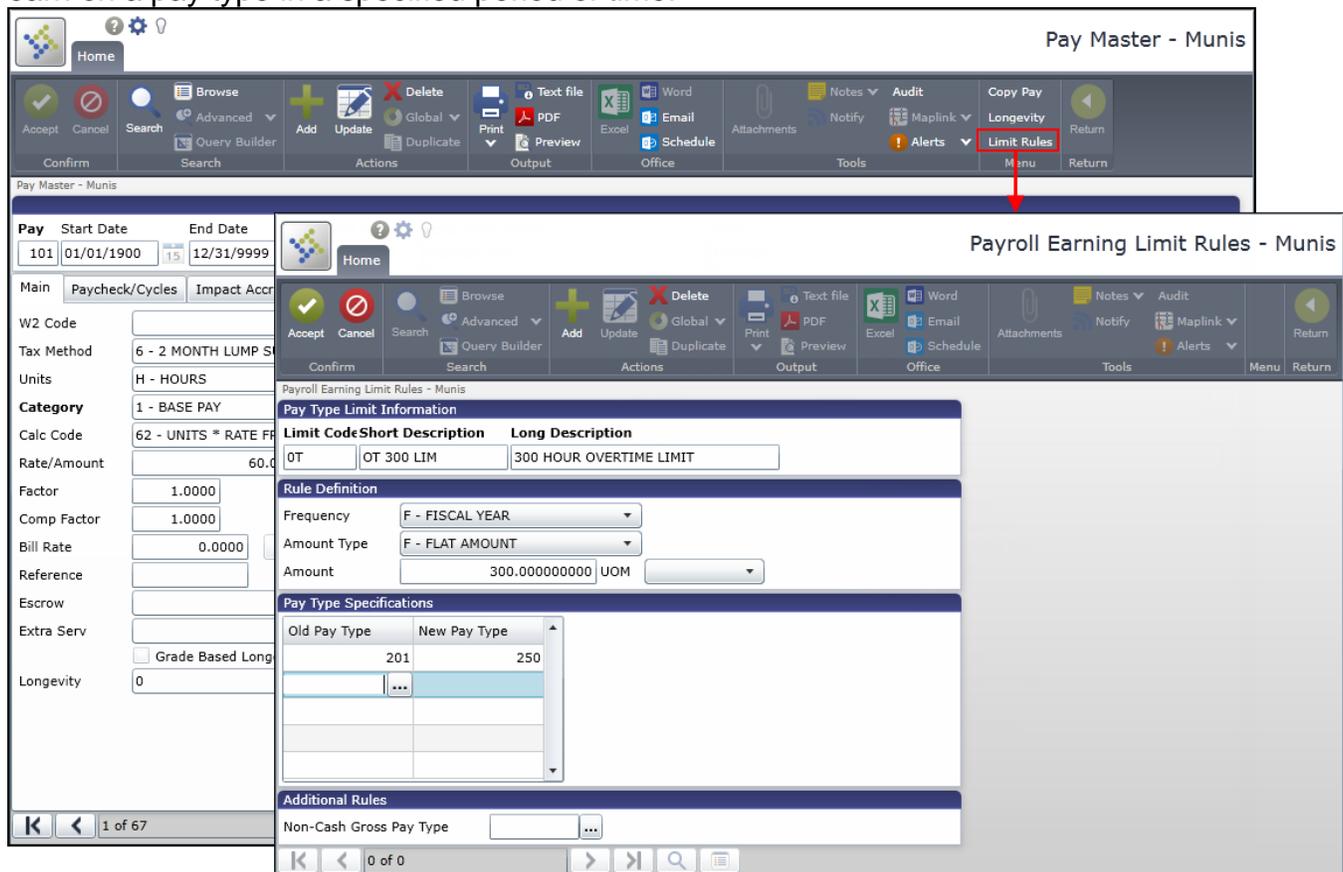
Once you have configured all necessary options, click View Results to display the proof screen.

Eligible	Employee Number	Employee Name	Job Class	Pay Type	Location	Group / BU	Org	Position	Current Rate/Salary	New Rate/Salary	Rate/Salary Change	Projected Annual Salary	Current Grade	New Grade	Current Step	New Step	Lump Sum Amount
<input type="checkbox"/>	501	MEDLIN, ANGEL	FRFI	111	220	18	12220000	544	65,000.0000	65,000.0000	0.0000	65,000.00	FRFI	FRFI	0	1	
<input checked="" type="checkbox"/>	291	JONES, JONATHAN	FRFI	111	220	18	12220000	55	40,000.0000	42,000.0000	2,000.0000	42,000.00	FRFI	FRFI	0	1	
<input checked="" type="checkbox"/>	140	CORBUN, ALLISON K	FRFI	111	220	18	12220000	55	46,200.0000	48,200.0000	2,000.0000	48,200.00	FRFI	FRFI	3	4	
<input checked="" type="checkbox"/>	85	HILDEBRANT-RITTENBERRY, LINDSEY H	FDIR	111	135	10	1100	14	49,200.0000	50,423.0000	1,223.0000	50,423.00	ACT1	ACT1	6	7	
<input checked="" type="checkbox"/>	166355	LEVESQUE, CECILE	FAC3	101	135	10	11135000	15	0.0000	40,294.0000	40,294.0000	40,294.00	ACT1	ACT1	0	1	
<input checked="" type="checkbox"/>	96	HILDEBRANT-RITTENBERRY, DYLAN PETER	FCL2	111	155	10	1000	9	0.0000	25,211.0000	25,211.0000	25,211.00	CLR1	CLR1	0	1	
<input checked="" type="checkbox"/>	135	RICHARDO, ELWIN M	FRDS	101	220	18	11135000	57	18.2500	18.7500	0.5000	39,000.00	FRDS	FRDS	1	2	
<input checked="" type="checkbox"/>	134	WYNNE, JUDITH K	FRDS	102	220	18	12220000	56	20.2500	20.7500	0.5000	43,160.00	FRDS	FRDS	5	6	
<input checked="" type="checkbox"/>	136	MCMULLIN, LARRY W	FRFI	111	220	18	12220000	50	46,200.0000	48,200.0000	2,000.0000	48,200.00	FRFI	FRFI	3	4	

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

## Pay Type Limit Rules

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



The screenshot shows the 'Payroll Earning Limit Rules - Munis' window. The 'Pay Type Limit Information' section contains the following data:

Limit Code	Short Description	Long Description
OT	OT 300 LIM	300 HOUR OVERTIME LIMIT

The 'Rule Definition' section contains the following data:

Frequency	F - FISCAL YEAR
Amount Type	F - FLAT AMOUNT
Amount	300.000000000 UOM

The 'Pay Type Specifications' section contains the following data:

Old Pay Type	New Pay Type
201	250

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

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

For example, you can configure a limit so that:

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

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

## Payroll Control Settings

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

# Employee Self Service

## Benefits Enrollment Paycheck Simulator

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

**Benefits Enrollment Settings - Munis**

Current Year: 2013  
 Current Year Start: 01/01/2013  
 Current Year End: 12/31/2013

New Year: 2014  
 New Year Start: 01/01/2014  
 New Year End: 12/31/2014

Open Enrollment Start: 01/01  
 Open Enrollment End: 12/31

Allow Life Event Changes  
 Generate Life Events Email  
 Use Cafeteria Plan  
 **Show Projected Net Pay Link**  
 Use Coverage for 834 File  
 Use Primary Job when using restrictions  
 Show Annual and Period Costs in ESS

**Open Enrollment**

**Make Elections**

Make a selection for each benefit, then click "Continue". You must submit this enrollment by 12/31/2014.  
 Please Select your elections for the coming year.

Benefit	Current Election	New Election	
DENTAL INSURANCE	No Election Made	Declined	<a href="#">Change New Election</a>
HEALTH INSURANCE	No Election Made	Declined	<a href="#">Change New Election</a>
LIFE INSURANCE	No Election Made	2014 LIFE INSURANCE \$259.20   details	<a href="#">Decline benefit   Change New Election</a>

[Continue](#)

All costs are per pay period. Your estimated total cost per pay period is \$259.20. The [paycheck simulator](#) can show how this effects your net pay.

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

**Paycheck Simulator**

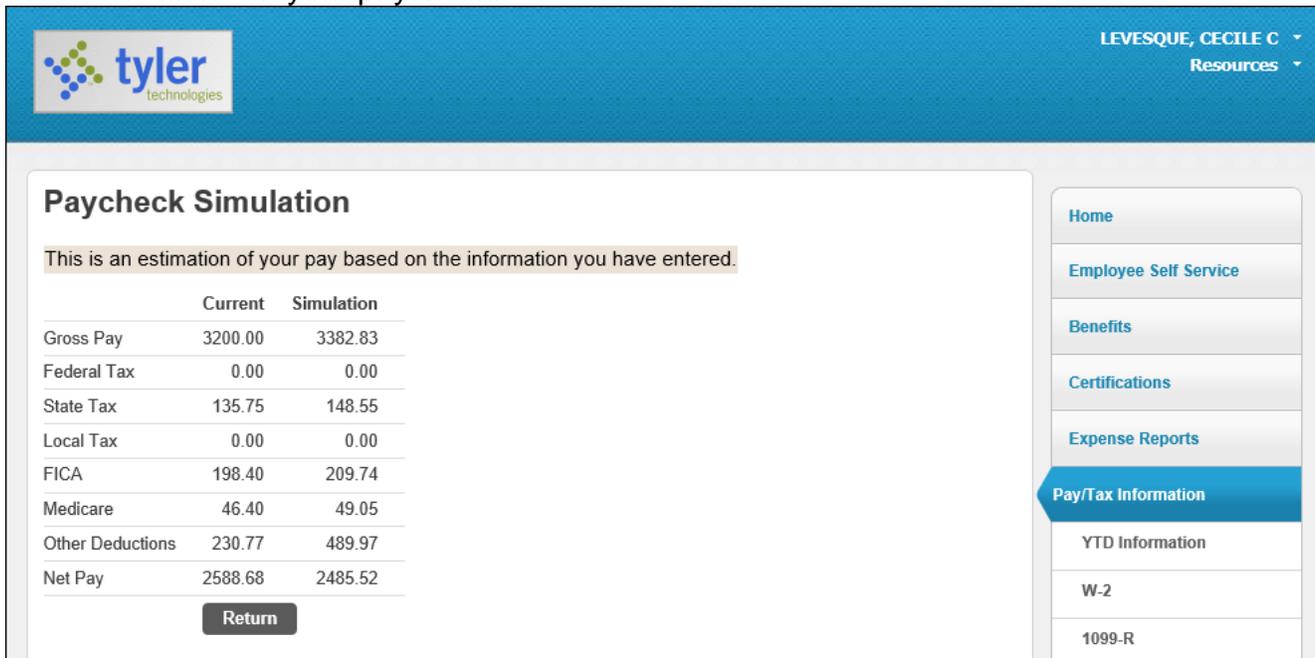
Pay cycle: 1 | Switching deduction cycles will reset the entire page.

**Pay Details**

Description	Amount
PRUDENTIAL INDIVIDUAL PLAN	0.00
DELTA DENTAL	230.77
LIFE INS	259.20

[Calculate](#) [Reset](#)

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



**Paycheck Simulation**

This is an estimation of your pay based on the information you have entered.

	Current	Simulation
Gross Pay	3200.00	3382.83
Federal Tax	0.00	0.00
State Tax	135.75	148.55
Local Tax	0.00	0.00
FICA	198.40	209.74
Medicare	46.40	49.05
Other Deductions	230.77	489.97
Net Pay	2588.68	2485.52

[Return](#)

LEVESQUE, CECILE C  
Resources

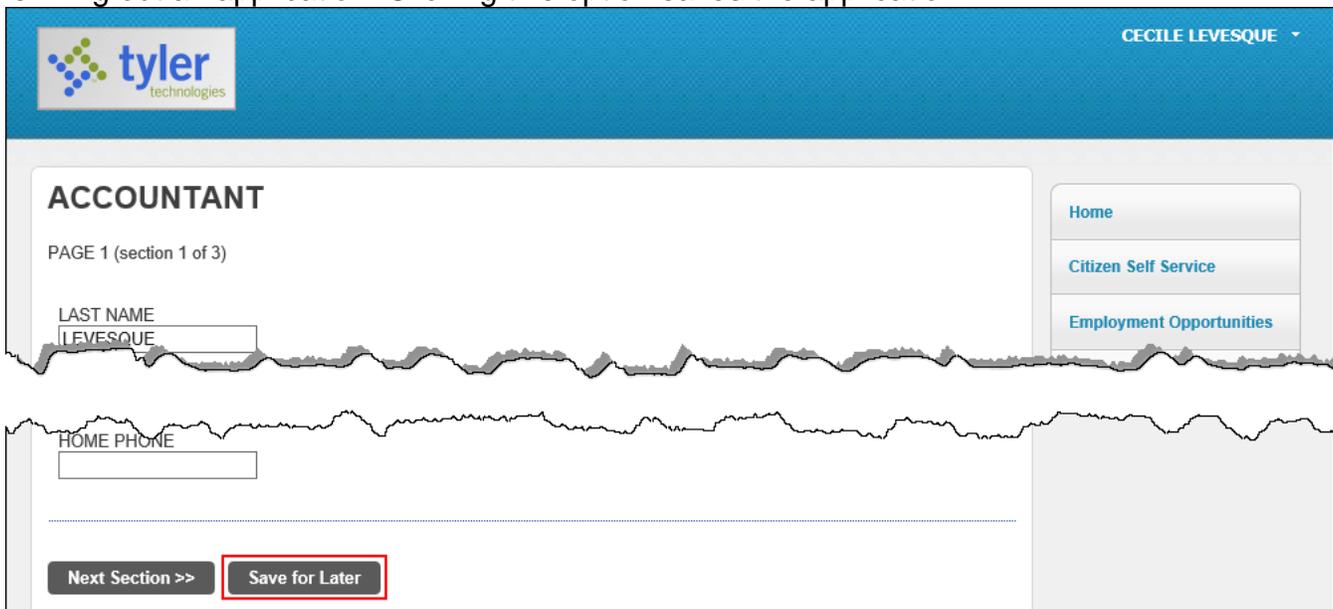
- Home
- Employee Self Service
- Benefits
- Certifications
- Expense Reports
- Pay/Tax Information**
- YTD Information
- W-2
- 1099-R

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

## Employment Opportunities

### Incomplete Job Applications

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



**ACCOUNTANT**

PAGE 1 (section 1 of 3)

LAST NAME  
LEVESQUE

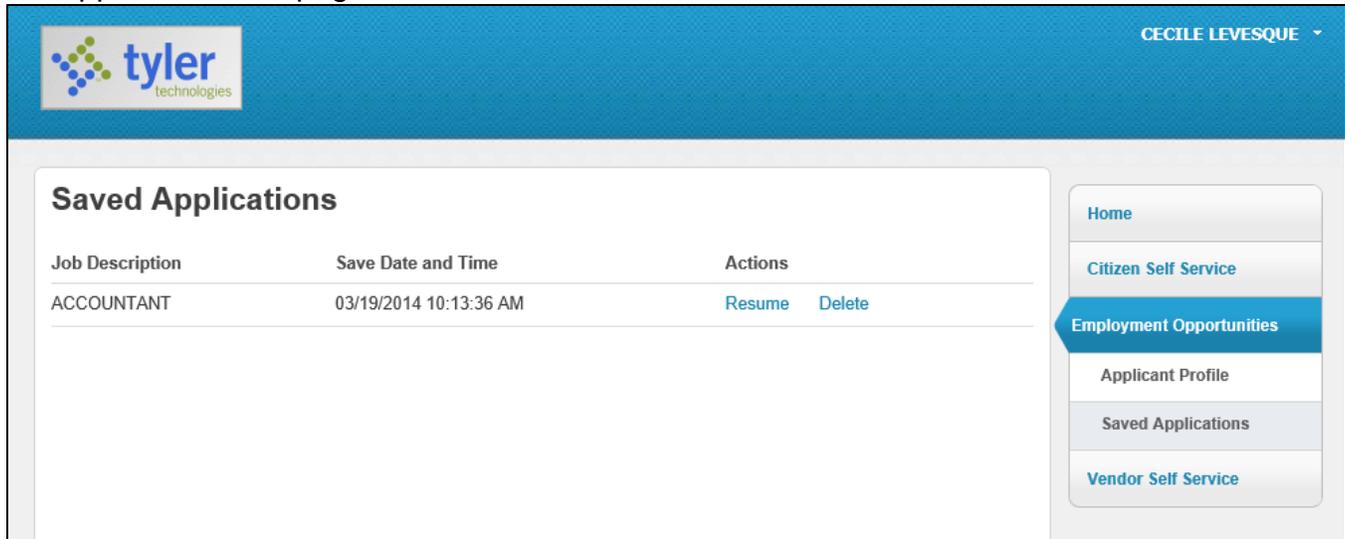
HOME PHONE

[Next Section >>](#) [Save for Later](#)

CECILE LEVESQUE

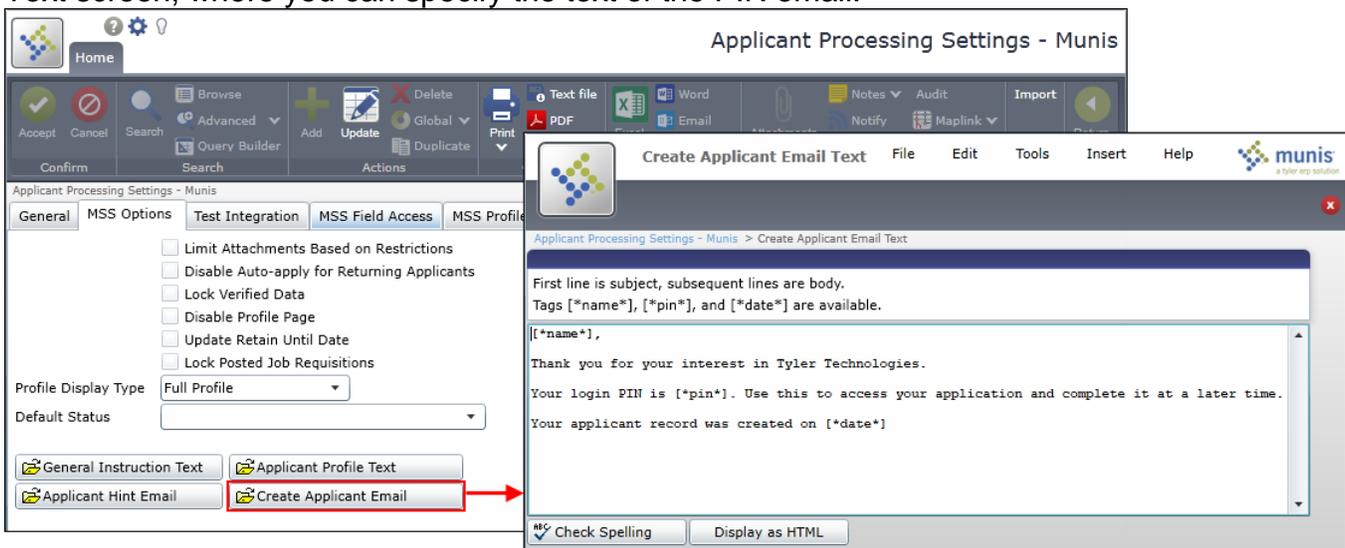
- Home
- Citizen Self Service
- Employment Opportunities

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

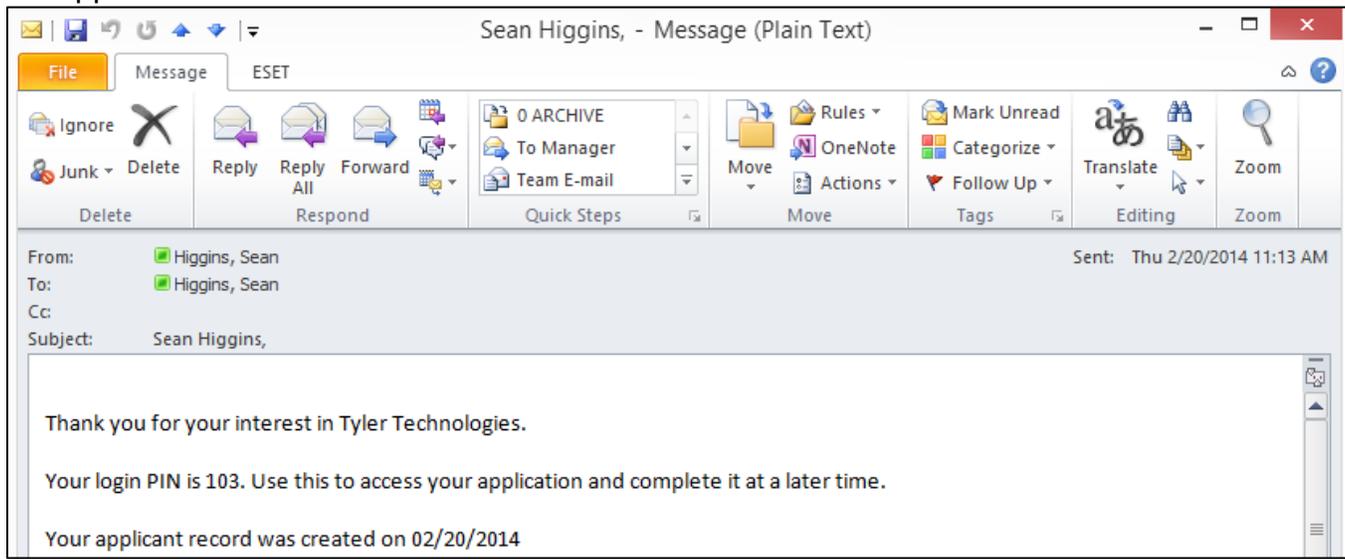


The Applicant Processing Settings program includes functionality for emailing a personal identification number (PIN) to all applicants who create an account on self service, even if they do not complete an application. They can use this PIN to access their account and complete unfinished applications.

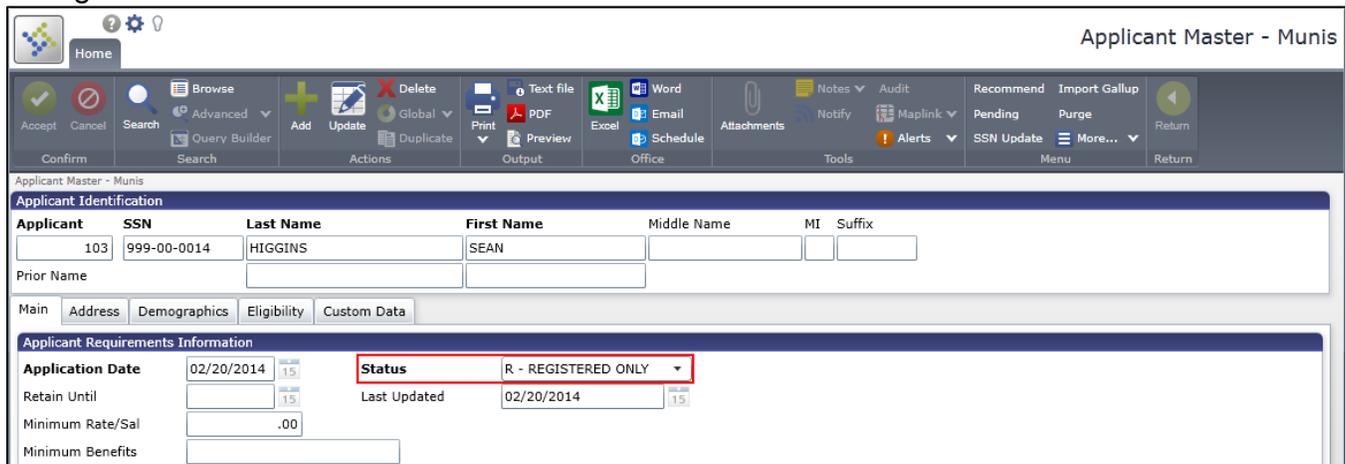
The Create Applicant Email option on the MSS Options tab opens the Create Applicant Email Text screen, where you can specify the text of the PIN email.



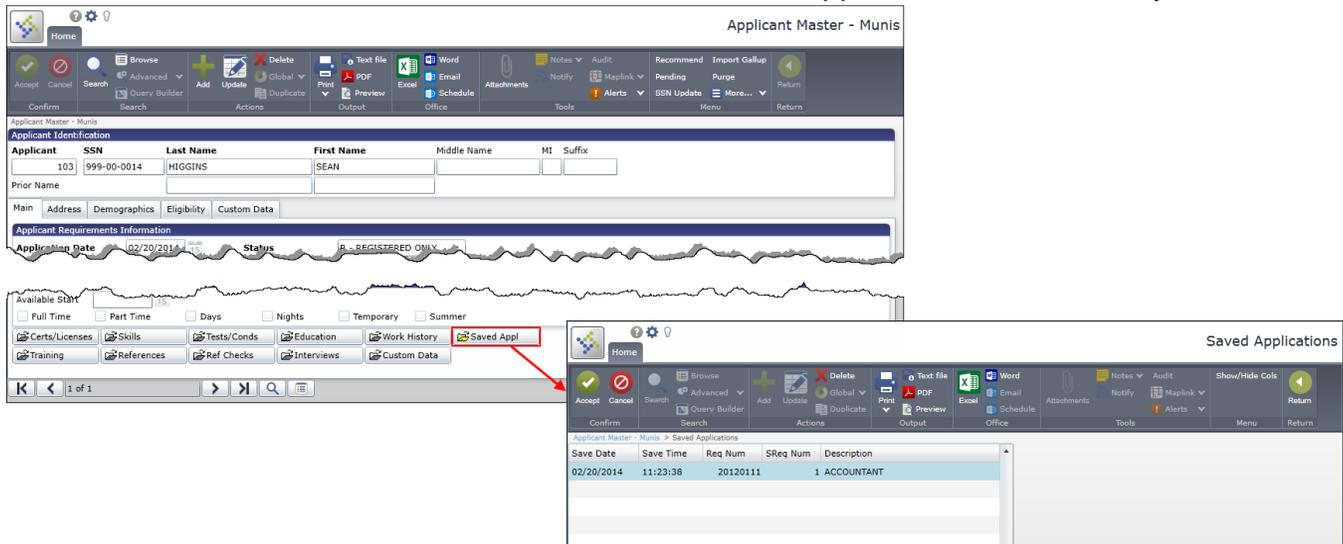
If you do not define an applicant email, the program uses a default format configured to supply the applicant's PIN.



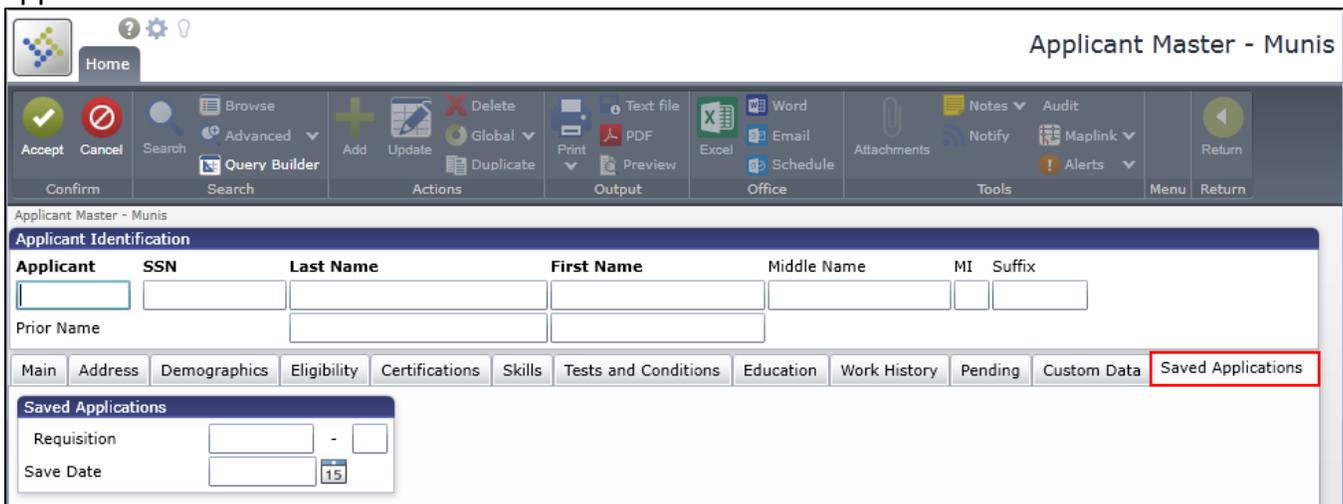
Applicant Master tracks the completion of applications. If an applicant has only logged into his or her account but not completed any applications, the status on the record is set to R - Registered Only. When the applicant has completed at least one application, the status is changed to Active.



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



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

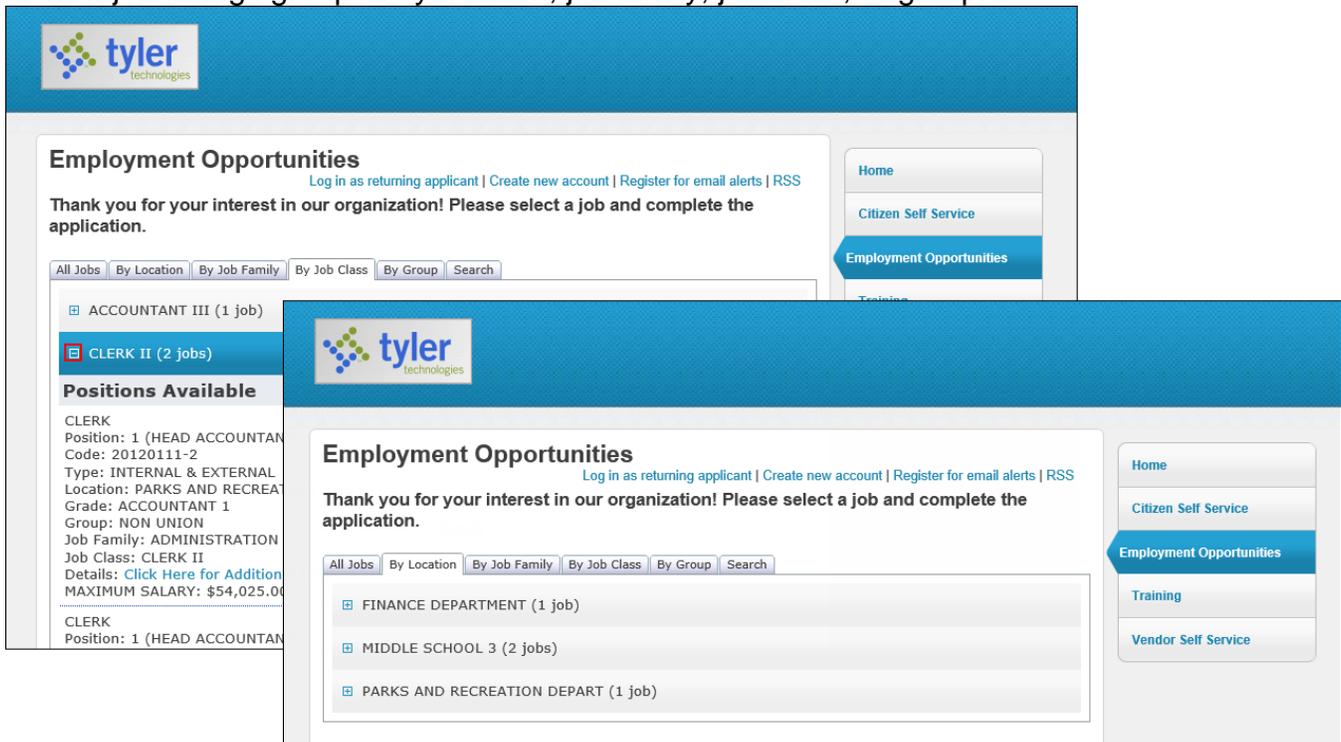


If you delete an applicant record, any associated saved applications are deleted as well. If you merge two applicant records, all applications saved on those records are merged.

### Employment Opportunities Page

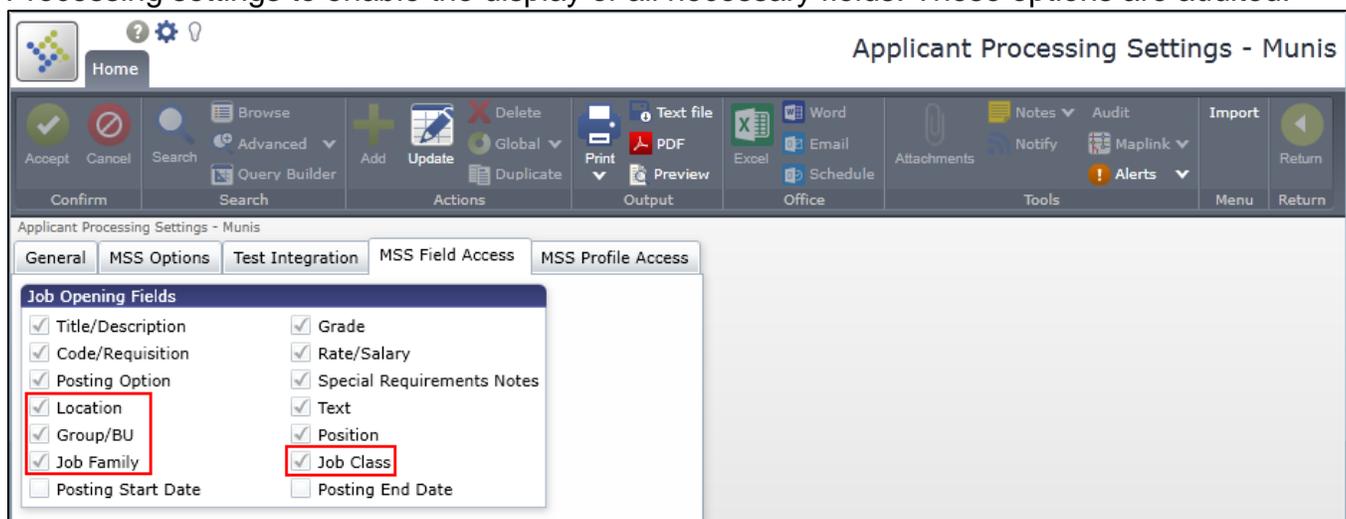
Munis Self Service and associated Munis programs provide greater control over how the Employment Opportunities page displays job openings to applicants.

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

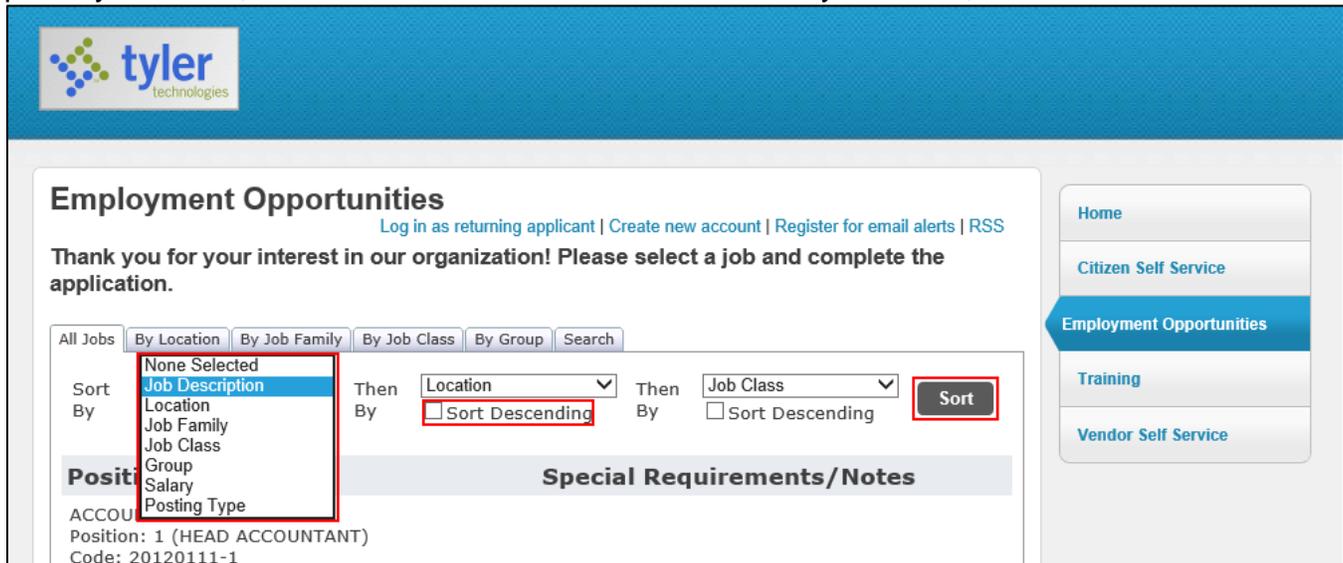


Each tab provides subgroups that further organize the job listings. For example, on the By Location tab, self service displays a header for each location that has job openings. Each header shows the number of openings for that location. Click the more (+) button on a header to expand that list of jobs.

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



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



**Employment Opportunities**  
[Log in as returning applicant](#) | [Create new account](#) | [Register for email alerts](#) | [RSS](#)

Thank you for your interest in our organization! Please select a job and complete the application.

All Jobs | **By Location** | By Job Family | By Job Class | By Group | Search

Sort By: **None Selected** (dropdown menu open showing: Job Description, Location, Job Family, Job Class, Group, Salary, Posting Type)

Then By: Location (dropdown) Then By: Job Class (dropdown)

Sort Descending  Sort Descending **Sort**

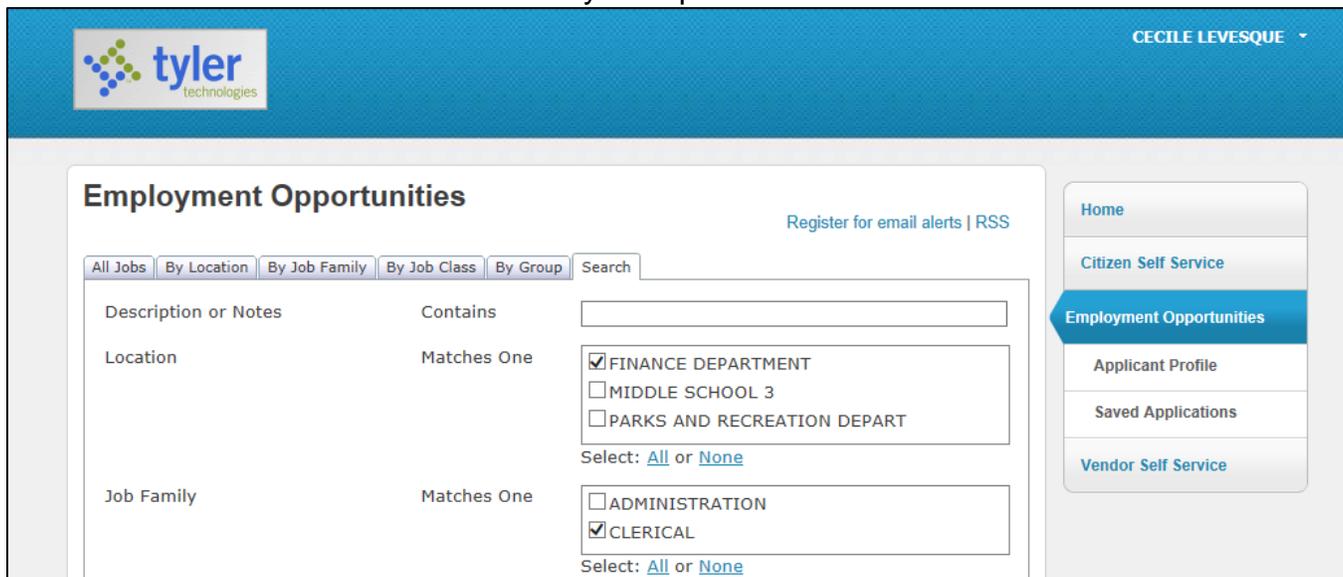
Special Requirements/Notes

ACCOU  
 Position: 1 (HEAD ACCOUNTANT)  
 Code: 20120111-1

Home  
 Citizen Self Service  
**Employment Opportunities**  
 Training  
 Vendor Self Service

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

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



**Employment Opportunities**  
[Register for email alerts](#) | [RSS](#)

CECILE LEVESQUE ▾

All Jobs | **By Location** | By Job Family | By Job Class | By Group | **Search**

Description or Notes Contains

Location Matches One  FINANCE DEPARTMENT  
 MIDDLE SCHOOL 3  
 PARKS AND RECREATION DEPART  
 Select: [All](#) or [None](#)

Job Family Matches One  ADMINISTRATION  
 CLERICAL  
 Select: [All](#) or [None](#)

Home  
 Citizen Self Service  
**Employment Opportunities**  
 Applicant Profile  
 Saved Applications  
 Vendor Self Service

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

Job Family	Matches One	<input type="checkbox"/> ADMINISTRATION <input checked="" type="checkbox"/> CLERICAL Select: <a href="#">All</a> or <a href="#">None</a>
Job Class	Matches One	<input type="checkbox"/> ACCOUNTANT III <input checked="" type="checkbox"/> CLERK II <input type="checkbox"/> HEAD ACCOUNTANT Select: <a href="#">All</a> or <a href="#">None</a>
Group	Matches One	<input type="checkbox"/> NON UNION <input checked="" type="checkbox"/> UNAFFILIAT Select: <a href="#">All</a> or <a href="#">None</a>
Minimum Salary	Equals	<input type="text" value="50000"/>
<input type="button" value="Search"/>		

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

**Search**

✓ 1 employment opportunity containing your search terms was found.

Positions Available	Special Requirements/Notes
CLERK Position: 1 (HEAD ACCOUNTANT) Code: 20120111-2 Type: INTERNAL & EXTERNAL Location: PARKS AND RECREATION DEPART Grade: ACCOUNTANT 1 Group: NON UNION Job Family: ADMINISTRATION Job Class: CLERK II Details: <a href="#">Click Here for Additional Info</a> MAXIMUM SALARY: \$54,025.00	<a href="#">Apply</a>

## Life Event Documentation

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

Qualifying Event Codes - Munis

**Qualifying Event** BABY

Short Description NEW BABY

Long Description NEW BABY

Days 30

Documents Required **BIRT - BIRTH CERTIFICATE**

### Life Events

Pending Life Events

You have no pending life events.

**Report a Life Event**

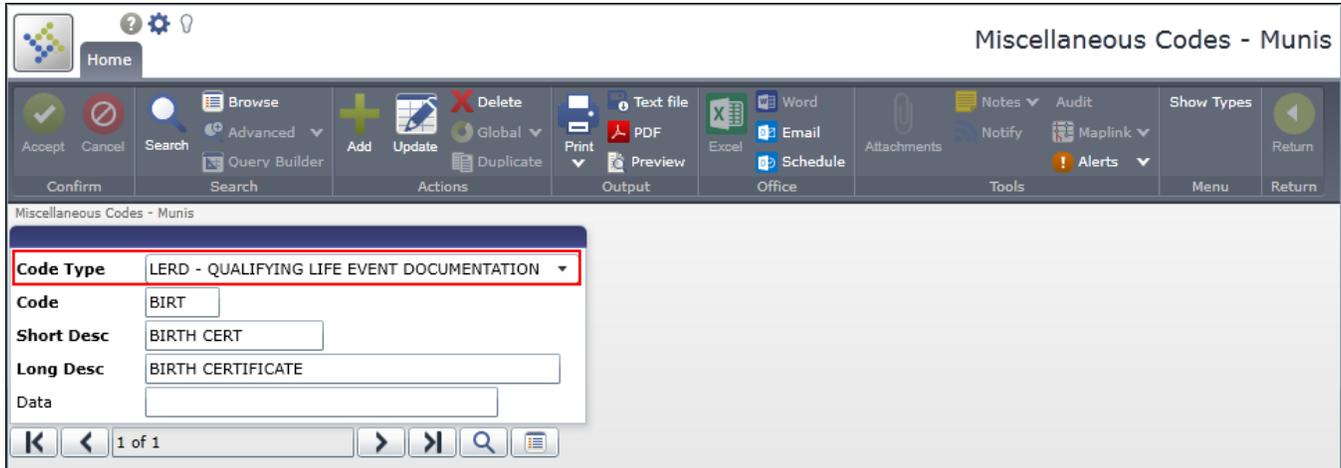
Life event

Required documentation   
Send required document to Human Resources

Effective date

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

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



Miscellaneous Codes - Munis

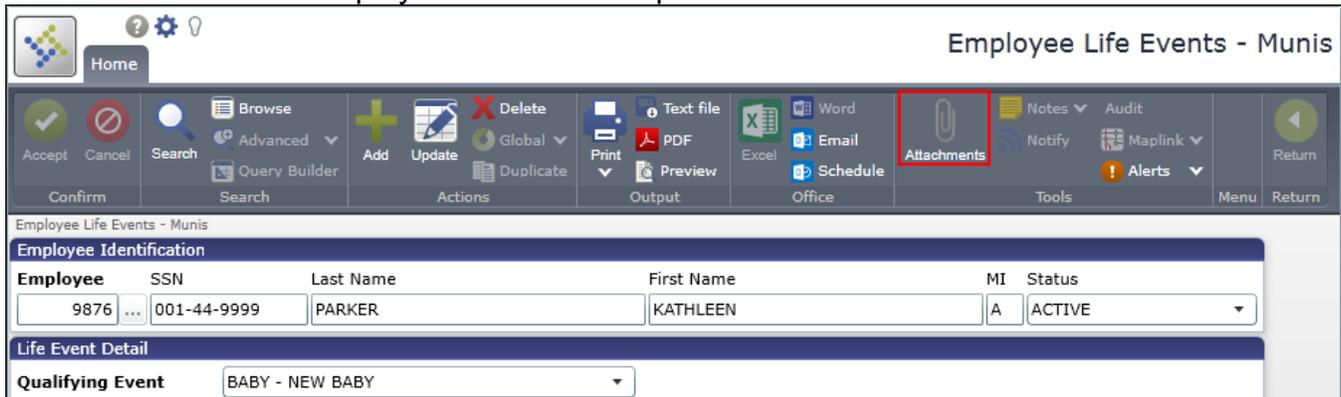
Code Type: LERD - QUALIFYING LIFE EVENT DOCUMENTATION

Code: BIRT

Short Desc: BIRTH CERT

Long Desc: BIRTH CERTIFICATE

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



Employee Life Events - Munis

Attachments

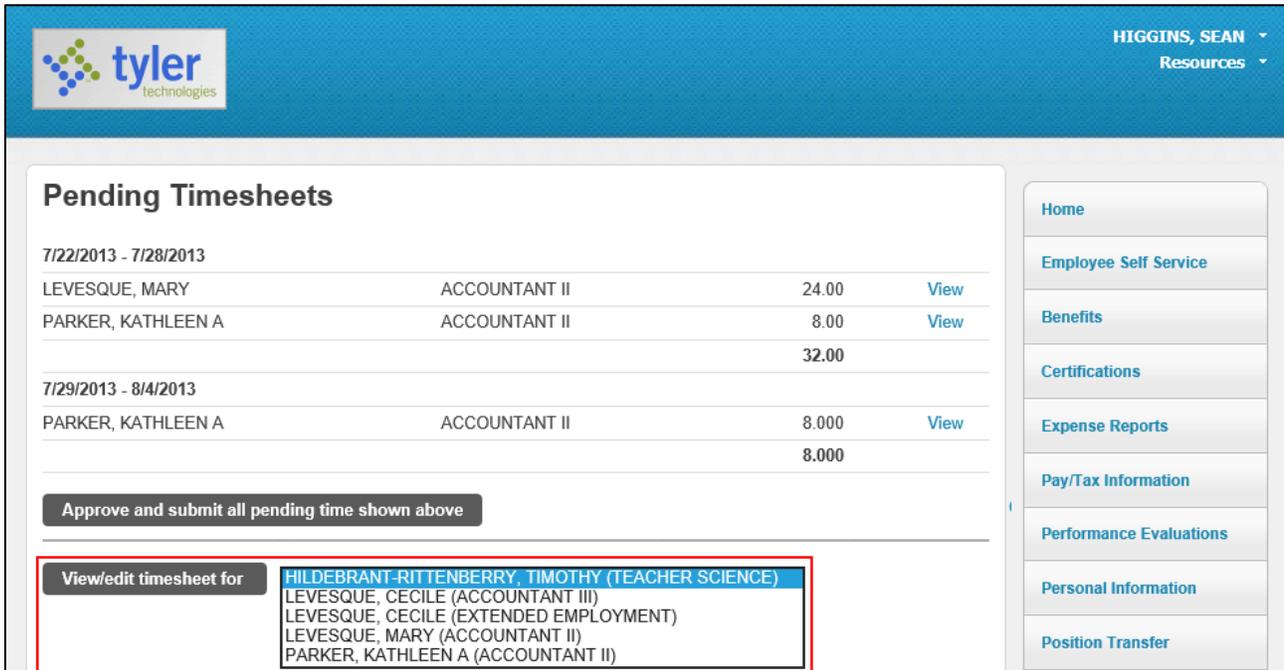
Employee	SSN	Last Name	First Name	MI	Status
9876	001-44-9999	PARKER	KATHLEEN	A	ACTIVE

Life Event Detail

Qualifying Event: BABY - NEW BABY

## Time Entry

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



**Pending Timesheets**

7/22/2013 - 7/28/2013

LEVESQUE, MARY	ACCOUNTANT II	24.00	<a href="#">View</a>
PARKER, KATHLEEN A	ACCOUNTANT II	8.00	<a href="#">View</a>
		32.00	

7/29/2013 - 8/4/2013

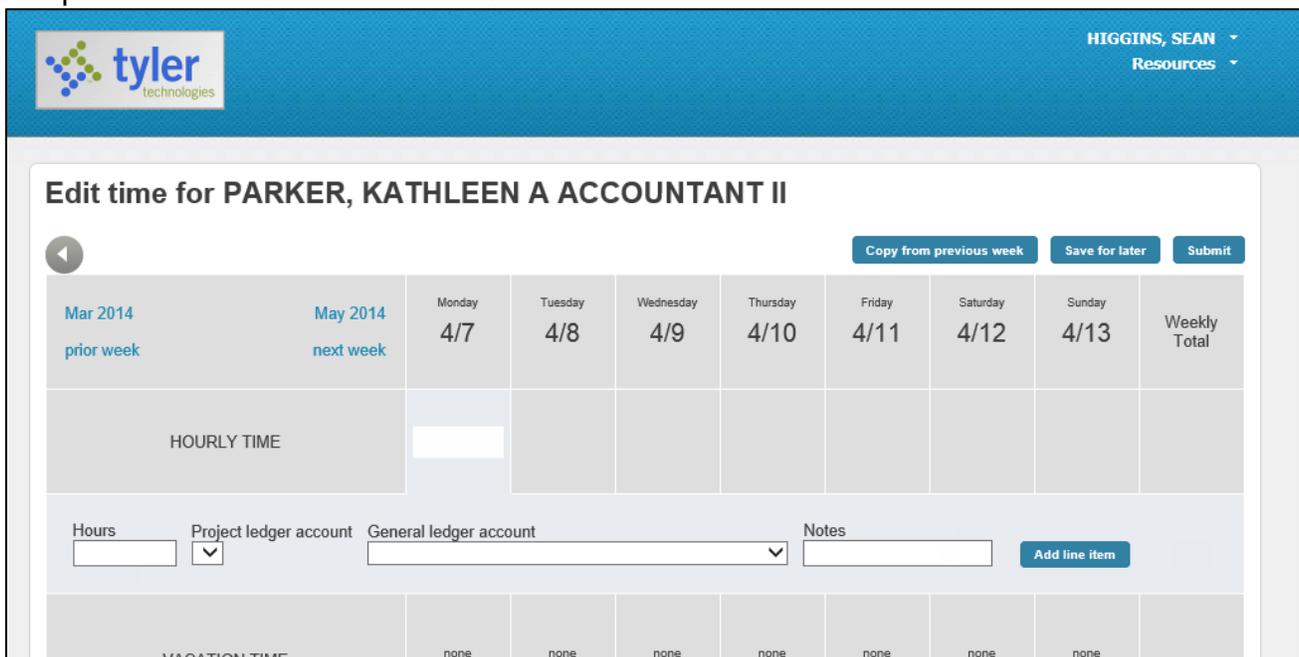
PARKER, KATHLEEN A	ACCOUNTANT II	8.000	<a href="#">View</a>
		8.000	

[Approve and submit all pending time shown above](#)

[View/edit timesheet for](#)

- HILDEBRANT-RITTENBERRY, TIMOTHY (TEACHER SCIENCE)
- LEVESQUE, CECILE (ACCOUNTANT III)
- LEVESQUE, CECILE (EXTENDED EMPLOYMENT)
- LEVESQUE, MARY (ACCOUNTANT II)
- PARKER, KATHLEEN A (ACCOUNTANT II)

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



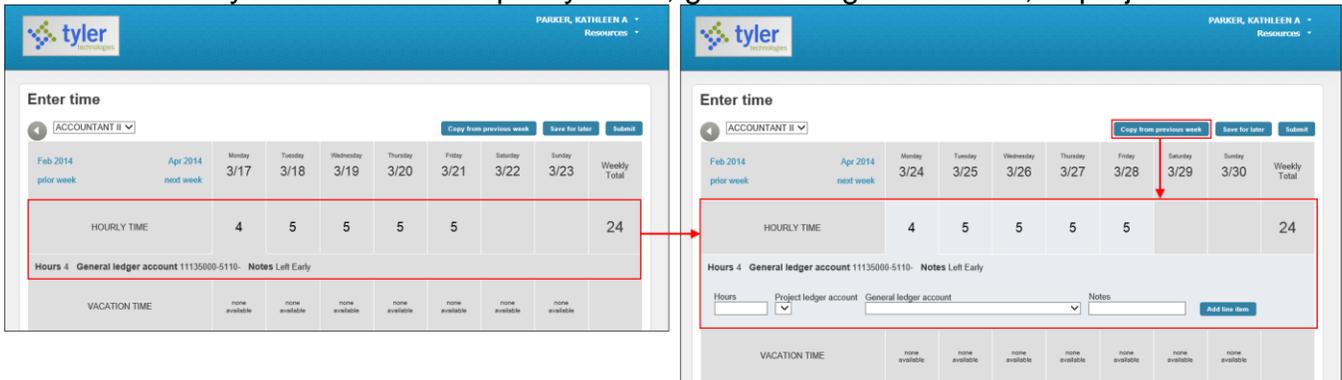
**Edit time for PARKER, KATHLEEN A ACCOUNTANT II**

[Copy from previous week](#) [Save for later](#) [Submit](#)

Mar 2014 prior week	May 2014 next week	Monday 4/7	Tuesday 4/8	Wednesday 4/9	Thursday 4/10	Friday 4/11	Saturday 4/12	Sunday 4/13	Weekly Total
HOURLY TIME									
Hours	Project ledger account	General ledger account		Notes					
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>					
VACATION TIME		none	none	none	none	none	none	none	

[Add line item](#)

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



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

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

