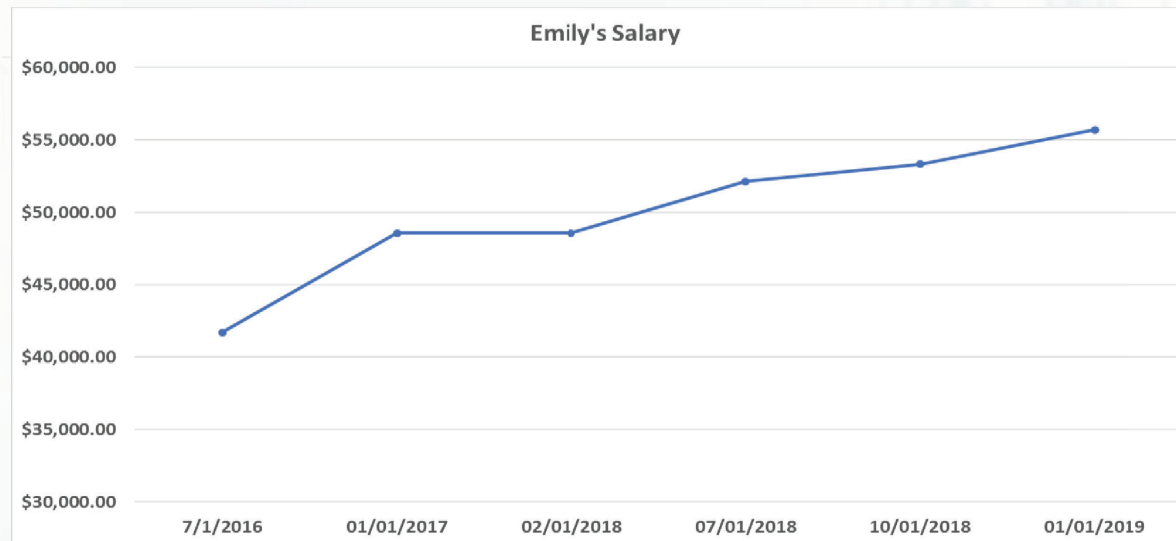


Agenda

- Introduction
- Overview
- Part 1 - Effective Dated Pays
 - New Base Pay
 - Dates and how they are used
 - Relationship to Salary Tables
 - Duplicating vs. Adding
 - Other Employee Pay Changes
- Key Takeaways

Benefits of Effective Dating

- Track a history of position and salary changes
- Plan for the future
- Automate retroactive payments



Comparison of V11.3 to V2019.1



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Job Salary in V11.3

Employee Job/Salary - Munis [Connect 2019]

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print PDF Text file Excel Word Email Schedule Attach Notify Audit Maplink Text Global Add/Del Global Update Project Update Recalc Global Update More... Return

Confirm Search Actions Output Office Tools Alerts Menu

Employee Identification

Employee SSN Last Name First Name MI Suffix Status

Main Cycles/Other Next Change Civil Service

Job Class Summary Class Pay Type Work Start/End Position Location Group/BU Status Risk Code Pay Freq Start Date End Date Project String Allocation Account Eff Date Grade Step

Calc Code Num Pays Days/Year Sched Hours Pay Basis Hours/Day Hours/Year Days/Period Factor Remain Off-Step/Frozen Pay Status

Pay Amounts

FTE % Hourly Rate Daily Rate Period Pay Annual Pay Remaining Reference

Mid-Cycle Amounts

Effective Date	Hourly Rate	Daily Rate	Period Pay	Hours/Day

Allocation Detail

Position	PA Type	Project String	T	Account	Loc	Position FTE	Amount	Hours	Percent	FTE1	FTE2	FTE3	FTE4	FTE5	Contract Type	Contract Location	Supervisor

More...

- Reset Pays
- Mid-Year Reset
- Sched Hours
- Single Emp Increase
- GL Acct Find
- Project String Find
- GL Allocation
- Mid-Cycle Amounts
- Employee Expense
- Remaining
- Recalc FTE
- Net to Gross

Job Salary in V11.3

Confirm	Search	Actions	Output
Employee Identification			
Employee	SSN	Last Name	First Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Main Cycles/Other Next Change Civil Service			
Job Class	<input type="text"/>		
Summary Class	<input type="text"/>		
Pay Type	<input type="text"/>		
Work Start/End	<input type="text"/> / <input type="text"/>		
Position	<input type="text"/>		
Location	<input type="text"/>		
Group/BU	<input type="text"/>		
Status	<input type="text"/>		
Risk Code	<input type="text"/>		
Pay Freq	<input type="text"/>		
Start Date	<input type="text"/>		
End Date	<input type="text"/>		
Project String	<input type="text"/>		
Allocation	<input type="text"/>		
Account	<input type="text"/>		
Eff Date	<input type="text"/>		
Grade	<input type="text"/>		
Step	<input type="text"/>		

- Account number field is displayed here for all records, even if an allocation is in use. If an allocation is used this field will be blank.
- Dates are not logically named.

Job Salary in V11.3

Allocation Detail																	
Position	PA Type	Project String	T	Account	Loc	Position FTE	Amount	Hours	Percent	FTE1	FTE2	FTE3	FTE4	FTE5	Contract Type	Contract Location	Supervisor

- All accounts will show here with associated information, but the fields cannot be edited.

Job Salary in V11.3

[illegible]

- The Mid-Cycle section of the screen holds information related to pay changes and dates.

Job Salary in 2018 and higher

Employee Job/Salary

Back

Search

Browse

Add

Update

Delete

Output

Print

Display

PDF

Save

Excel

Word

Email

Schedule

Attach

Duplicate

Text

Global Add/Del

Menu

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

Summary Job Class

Position *

Pay Type *

Effective Date *

Primary Job/Position

Position Start/End *

Location *

Group/BU *

Status

Risk Code

Pay Start/End *

Pay Freq *

Grade/Step

Allocation

Calc Code

Num Pays *

Days/Year *

Sched Hours *

Pay Basis

Hours/Day

Hours/Year

Days/Period

Factor

Remain

Off-Step/Frozen

Pay Status

Pay Amounts

FTE % *

Hourly Rate

Daily Rate

Period Pay

Annual Pay

Remaining

Reference

Allocation Detail

PA Type

Project String

T

Account

Loc

Grant

Amount

Hou

0 of 0

Job Salary in 2018 and higher

	MAIN	CYCLES/OTHER	NEXT CHANGE	CIVIL SERVICE
Job Class *	<input type="text"/>			
Summary Job Class	<input type="text"/>			
Position *	<input type="text"/>			
Pay Type *	<input type="text"/>			
Effective Date *	<input type="text"/>			
	<input type="checkbox"/> Primary Job/Position			
Position Start/End *	<input type="text"/>			
Location *	<input type="text"/>			
Group/BU *	<input type="text"/>			
Status	<input type="text"/>			
Risk Code	<input type="text"/>			
Pay Start/End *	<input type="text"/>			
Pay Freq *	<input type="text"/>			
Grade/Step	<input type="text"/>			
Allocation	<input type="text"/>			

- Effective date has been moved up from the lower part of the screen. It is now part of the record key.
- The account line has been removed.
- Date fields are renamed.

Job Salary in 2018 and higher

Calc Code	<input type="text"/>	Hours/Day	<input type="text"/>
Num Pays *	<input type="text"/>	Hours/Year	<input type="text"/>
Days/Year *	<input type="text"/>	Days/Period	<input type="text"/>
Sched Hours *	<input type="text"/>	Factor	<input type="text"/>
Pay Basis	<input type="text"/>	Remain	<input type="text"/>
		Off-Step/Frozen	<input type="text"/>
		Pay Status	<input type="text"/>

Pay Amounts	
FTE % *	<input type="text"/>
Hourly Rate	<input type="text"/>
Daily Rate	<input type="text"/>
Period Pay	<input type="text"/>
Annual Pay	<input type="text"/>
Remaining	<input type="text"/>
Reference	<input type="text"/>

- Mid-Cycle information has been removed now that pays can be effective dated.

Job Salary in 2018 and higher

Allocation ...  Reference

Allocation Detail

PA Type	Project String	T	Account	Loc	Grant	Amount	Hour
---------	----------------	---	---------	-----	-------	--------	------

- The account display grid has been modified and can be edited.
- Redundant information has been removed.
- All accounts display here.
- Manual allocations can be created by simply adding additional accounts.

Job Salary in 2018 and higher

MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE

Job Class *

Summary Job Class

Position *

Pay Type *

Effective Date *

☐ Primary Job/Position

Position Start/End * /

Location *

Group/BU *

Status

Risk Code

Pay Start/End * /

Pay Freq *

Grade/Step /

Allocation

Longevity Date

- Dates have been renamed. Hopefully this will result in easier to use and understand information.
- Notice that we now have Position Start and End, Pay Start and End, and Longevity Date, in addition to the Effective Date that is now part of the key information.

Employee Pay: Example 1



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Example 1: Let's give our accountant a raise

- Emily is due for a raise (employee 105)



Emily's Current Base Pay

Employee Job/Salary

Employee Identification

Employee *	SSN	Last Name	First Name	MI	Suffix	Status
105	294-39-1846	COHN	EMILY	P		A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE


Job Class *	FAC1	ACCOUNTANT I
Summary Job Class	FD	FINANCE
Position *	13505	ACCOUNTANT
Pay Type *	111	ANNUAL SALARY
Effective Date *	04/11/2016	to: 12/31/9999
	<input checked="" type="checkbox"/>	Primary Job/Position

Position Start/End *	07/26/2004	/	12/31/9999
Location *	135 - FINANCE DEPARTMENT		
Group/BU *	10 - NON UNION		
Status	FT - FULL TIME		
Risk Code	5000	ADMINISTRATION SERVICES	
Pay Start/End *	07/26/2004	/	12/31/9999
Pay Freq *	B - BIWEEKLY		
Grade/Step	ACT1	/	5 ACCOUNTANT 1
Allocation	0		

Calc Code	11	Hours/Day	8.00
Num Pays *	26.000	Hours/Year	2080.00
Days/Year *	260.00	Days/Period	10
Sched Hours *	80.00	Factor	1.0000
Pay Basis	A	Remain	10.000
		Off-Step/Frozen	N - No
		Pay Status	A - ACTIVE

FTE % *	1.0000	Recurring Pay	
Hourly Rate	24.3985		24.3985
Daily Rate	195.1885		195.1885
Period Pay	1,951.88		1,951.88
Annual Pay	50,749.00		50,749.00
Remaining	23,715.82		
Reference	50,749.00		

Create a new Pay Instance

 **Employee Job/Salary**

Back Search Browse Add Update Delete Output Print Display PDF Save Excel Word Email Schedule Attach **Duplicate** Text Menu

Employee	SSN	Last Name	First Name	MI	Suffix	Status
105	294-39-1846	COHN	EMILY	P		A - ACTIVE

MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE

Job Class * FAC1 ACCOUNTANT I

Summary Job Class FD FINANCE

Position * 13505 ACCOUNTANT 2018

Pay Type * 111 ANNUAL SALARY

Effective Date * 07/01/2018 to: 12/31/9999

☒ Primary Job/Position

Position Start/End * 07/26/2004 / 12/31/9999

Location * 135 - FINANCE DEPARTMENT

Group/BU * 10 - NON UNION

Status FT - FULL TIME

Risk Code 5000 ADMINISTRATION SERVICES

Pay Start/End * 07/26/2004 / 12/31/9999

Pay Freq * B - BIWEEKLY

Grade/Step ACT1 / 6 ACCOUNTANT 1

Allocation 0

Calc Code 11 Hours/Day 8.00

Num Pays * 26.000 Hours/Year 2080.00

Days/Year * 260.00 Days/Period 10

Sched Hours * 80.00 Factor 1.0000

Pay Basis A Remain 10.000

Off-Step/Frozen N - No

Pay Status A - ACTIVE

Pay Amounts

	FTE % *	Recurring Pay
Hourly Rate	1.0000	25.5664
Daily Rate		204.5308
Period Pay		2,045.31
Annual Pay		53,178.00
Remaining		23,715.82
Reference		53,178.00

Pay Over Time

Employee Job/Salary

Back Search Browse Add Update Delete Output Print Display PDF Save

Employee ID: 105 SSN: 294-39-1846 Last Name: COHN First Name: EMILY


MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE












Job Class * FAC1 ACCOUNTANT I
Summary Job Class FD FINANCE
Position * 13505 ACCOUNTANT
Pay Type * 111 ANNUAL SALARY
Effective Date * 04/11/2016 to: 06/30/2018
☒ Primary Job/Position
Position Start/End * 07/26/2004 / 12/31/9999
Location * 135 - FINANCE DEPARTMENT
Group/BU * 10 - NON UNION
Status FT - FULL TIME
Risk Code 5000 ADMINISTRATION SERVICES
Pay Start/End * 07/26/2004 / 12/31/9999
Pay Freq * B - BIWEEKLY
Grade/Step ACT1 / 5 ACCOUNTANT 1
Allocation 0

Original Pay Record

- Now has a system calculated effective end date
- Pay End has not been changed

Pay Over Time

 **Employee Job/Salary**

 Back  Search  Browse  Add  Update  Delete  Output  Print  Display  PDF  Save

Employee	SSN	Last Name	First Name
105	294-39-1846	COHN	EMILY

MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE

Job Class *
Summary Job Class
Position *
Pay Type *
Effective Date *
Position Start/End *
Location *
Group/BU *
Status
Risk Code
Pay Start/End *
Pay Freq *
Grade/Step
Allocation

FAC1

...

ACCOUNTANT I

FD

FINANCE

13505

...

ACCOUNTANT 2018

111

...

ANNUAL SALARY

07/01/2018

to: 12/31/9999

☒ Primary Job/Position

07/26/2004

/

12/31/9999

135 - FINANCE DEPARTMENT

10 - NON UNION

FT - FULL TIME

5000

...

ADMINISTRATION SERVICES

07/26/2004

/

12/31/9999

B - BIWEEKLY

ACT1

/

6

...

ACCOUNTANT 1

0

...

Duplicated (new) Pay Record

- System calculated effective end date at maximum default
- Pay End set the same

Pay Over Time

Employee Job/Salary													
Back	Accept	Cancel	Search	Output	Print	Display	PDF	Save	Excel	Word			
Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay	
1	105	FAC1	13505	111	04/11/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	24.3985	1951.88	50749.00	
2	105	FAC1	13505	111	07/01/2018	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	25.5664	2045.31	53178.00	

Browse the record set. This will show pay history for the employee over time.

Export to Excel for a great report of historical pay.

Employee Pay – Recap of Changes



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New Search Period

Employee Identification			
Employee *	SSN	Last Name	First Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Search Period	<input checked="" type="radio"/> Current <input type="radio"/> All <input type="radio"/> Historical <input type="radio"/> Future <input type="radio"/> Specific Date		
			<input type="text"/>
MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE			

- A new addition to the find option is the ability to search based on time. The Search Period is only available in Find mode. There are five options: Current, All, Historical, Future, and Specific Date.
- The chosen option is saved by User and will default on the next Find that is performed.

New Search Period - Current

Employee Job/Salary												
<div> Back Accept Cancel Search Output Print Display PDF Save Excel Word </div>												
Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay
1	26	ITDI	15501	111	01/01/2015	Y	1000-1-155-000-00-00-0000-0-5110 -	Y	80.00	31.4741	2517.93	65466.16
2	78	FRFI	5150	105	01/21/2016	Y	1000-2-220-000-00-00-0000-0-5111 -	Y	0.00	0.0000	0.00	0.00
3	100	AFDR	13502	111	01/31/2016	Y		Y	80.00	34.4899	2759.19	71739.00
4	101	FAC3	13503	111	04/11/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	33.2881	2663.05	69239.38
5	102	FAC1	13505	111	01/01/2019	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	0.0000	0.00	0.00
6	103	FCL1	13516	111	02/12/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	15.3250	1226.00	31876.07
7	104	FCL1	13517	111	12/31/2015	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	14.8786	1190.29	30947.64
8	105	FAC1	13505	111	07/01/2018	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	25.5664	2045.31	53178.00
<div> Column Total </div>												
<div> Search / Filter Record </div>												
<div> 1 of 610 </div>												

610 Base Pay records returned with various effective dates, and they are all currently active and in effect.

New Search Period - All

Employee Job/Salary

630 Base Pay records returned with various effective dates; however some are not currently active due to the effective date.

New Search Period - Historical

Employee Job/Salary

Back

Accept

Cancel

Search

Output

Print

Display

PDF

Save

Excel

Word

Help

Settings

Question

P

Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay
1	105	FAC1	13505	111	04/11/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	24.3985	1951.88	50749.00
2	106	HRDR	13522	111	02/18/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	30.8848	2470.78	64240.16
3	114	ITEG	15510	111	07/01/2008	Y	1000-1-155-000-00-00-0000-0-5110 -	Y	80.00	33.5938	2687.50	69875.00
4	143	PWDR	25001	102	07/27/2004	Y	1000-4-172-250-00-00-0000-0-5110 -	Y	80.00	31.2500	2500.00	65000.00
5	738	PARK	28	100	01/01/2018	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	8.00	20.2300	0.00	0.00
6	900	LIFG	17711	101	07/26/2004	Y	1000-6-177-000-00-00-0000-0-5110 -	Y	0.00	14.0000	0.00	0.00
7	901	LIFG	17711	101	07/26/2004	Y	1000-6-177-000-00-00-0000-0-5110 -	Y	0.00	14.0000	0.00	0.00
8	902	LIFG	17711	101	01/21/2016	Y	1000-6-177-000-00-00-0000-0-5110 -	Y	0.00	14.0000	0.00	0.00
Total												
Search / Filter												
Record												
1 of 16												

16 Base Pay records returned with various effective dates; however none of them are currently active due to the effective date.

New Search Period - Future

Employee Job/Salary

Back
 Accept
 Cancel
 Search

Output
 Print
 Display
 PDF
 Save

Excel
 Word

Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay
1	100	AFDR	13502	111	07/01/2019	Y		Y	80.00	35.6916	2855.33	74238.62
2	800058	S202	92023	111	09/01/2019	Y	9000-3-910-202-03-00-1100-1-7005 -	Y	5.00	25.1503	866.72	22534.69
3	800058	S202	92028	111	09/01/2019	N	9000-3-910-202-03-00-1100-1-7005 -	Y	0.00	25.1503	866.72	22534.69
4	800080	S202	92023	111	12/31/2019	N	9000-3-910-202-03-00-1100-1-7005 -	Y	0.00	15.4771	533.37	13867.50

Column

Total

Hours

85.00

Period Pay

5,122.14

Annual Pay

133,175.50

Search / Filter

Record

1 of 4

4 Base Pay records returned with various future effective dates. None of them are currently effective, and will only become active after the effective date has passed.

New Search Period - Specific Date

Employee Job/Salary

<

6 Base Pay records returned with various effective dates prior to the specified date. In this case it was 8/1/2004. Some of the records could be effective now, and therefore active, but there is no way to tell unless we examine in more detail; however they were all effective (and active) as of the specified date.

Employee Pay - Dates

- Effective Date – **Drives the payroll process**
- Position Start and End – when position is active for this record
- Pay Start and End – formerly Start/End for pay
- Longevity Calculate – new date field specifically used for longevity calculations

Employee Pay – Primary Job/Position Flag

- Effective date and position are now part of the key
- Primary Job/Position combination now stored at the employee pay level
- Will default in when upgrading to 2018 or higher

The screenshot displays the 'Employee Job/Salary' form. The 'Employee Identification' section includes fields for Employee (800080), SSN (802-99-3381), Last Name (ZAHO), and First Name (SAMANTHA). The 'MAIN' tab is selected, showing fields for Job Class (S205), Summary Job Class (TCHR), Position (92051), Pay Type (111), Effective Date (09/01/2018), and Position Start/End (07/01/1992 to 12/31/9999). A red box highlights the 'Pay Type' and 'Effective Date' fields, with a checkbox labeled 'Primary Job/Position' checked below them.

Employee Job/Salary			
Employee Identification			
Employee *	SSN	Last Name	First Name
800080	802-99-3381	ZAHO	SAMANTHA
MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE			
Job Class *	S205	TEACHER ART	
Summary Job Class	TCHR	TEACHER	
Position *	92051	TEACHER ART (HIGH SCHOOL)	
Pay Type *	111	ANNUAL SALARY	
Effective Date *	09/01/2018	to: 12/31/9999	
<input checked="" type="checkbox"/> Primary Job/Position			
Position Start/End *	07/01/1992	/ 12/31/9999	

Employee Pay – Allocation Details

- All accounts viewed and maintained in one place
- Manual allocations removed
- Coded allocations can still be used as a default

Grade/Step	A	...	/	8	...	BA	remaining	
Allocation	800080	...		ZAHO			Reference	

Allocation Detail

PA Type	Project String	T	Account	Loc	Grant	Amount	Hours	Percent
		E	9000-3-910-205-03-00-1100-1-7005 -	9100	<input type="checkbox"/>	15369.82	3.50	70.000000
		E	9100-0-000-000-00-00-0000-0-7005 -T115	9100	<input type="checkbox"/>	6587.06	1.50	30.000000

Employee Pay – Salary Tables

- Salary tables have NOT changed.
- Effective dates DO NOT have to match between Salary tables and Job Salary records.
- Effective dates DO NOT have to match between Salary tables and Position records.
- Effective dates DO NOT have to match between Job Salary and Position records.
- **Job Salary effective date is now the driving force in the payroll process.**

Employee Pay – Duplicating vs. Adding vs. Updating

- **The Effective Date is a key field and cannot be updated.**
- Add a new record when a prior instance of the Job/Position/Pay does NOT exist.
- Duplicate when a prior instance DOES exist and the Job/Position defaults will remain the same. Duplicate allows a new effective date to be defined and duplicates all associated pays as well.
- Update when the Job/Position/Pay/Effective Date will remain the same.

What to remember

- Main takeaways
 - Historical pays and positions
 - Future dated pays and positions
 - Improved Retroactive Pay Processing
- Evergreen