

# Simplifying Payroll with Effective Dated Pays

Munis – Human Capital Management - Payroll

## **CLASS DESCRIPTION**

Effective Dated pay records are here! In this session, we will compare how pay records were entered in earlier versions of Munis and how Effective Dated records make the process easier. Topics include processing upcoming pay changes, retro pay calculation, and access to pay history records.

#### SESSION OVERVIEW

To provide a better understanding of how to use Effective Dated functionality to reduce manual processing, while providing easier access to pay history information.

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# PREREQUISITES

For this course it is recommended that you have experience maintaining Employee Job/ Salary records and processing Payroll.

# What are Effective Dated Pays?

In order to explain how Effective Dated pays work, it's important to know how pays were handled prior to these changes. In all versions of Munis pre-2018.1, employees were only able to have one base pay record per Job Class in Employee Job/Salary. That single pay record would only show the current Effective Date and pay rate, without any information on pay history or changes to come.

Changes to Employee Job/Salary records before 2018.1 were handled in two ways. For an employee who was not switching Job Class or Pay Type, any adjustments were handled by using the update option in Employee Job/Salary. This would override the information that was there previously, and changes could only be tracked by reviewing the Audit for the record or reviewing Personnel Action History. These changes included Pay Rate, GL Account and Scheduled Hours/Day/Period changes.

If an employee was leaving a job to either move to a new job or because they were ending their time with the company, the original record would be updated to have an end date and may have the pay status changed to Inactive. If the employee was moving to a new Job, a new record would be added at that point.





Starting with 2018.1 the Effective Date was added as a key piece of Employee Job/Salary. This allows that same program to now hold not only current records, but history as well as future dated changes.

\$	Employ	ee Job	/Salar	y																				
<b>E</b> Back	<b>Q</b> Search	Browse	+ Add	Update	X Delete	Output	Print	Display	PDF	Save	Excel	Word	Email	Schedule	Attach	Duplicate	Text	Global Add/Del	U Global Update	Project Update	Recalc	B Reset Pays	Y Mid-Year Reset	B Sched Hor
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# Add, Update or Duplicate?

With the introduction of effective dated pays now is a good time to review when to Add, Update or Duplicate an Employee Job Salary record.

When to Add a new record

- If an employee is changing Jobs
- When adding a second job to an employee
- If the Pay code is changing (for example hourly to salary)

When to Update a pay record

• If information was entered incorrectly (and retro is not owed)

When to **Duplicate** a pay record

- If an employee has a rate of pay change
- If an employee has a grade/ step increase
- If an employee has an allocation change
- If an employee moves from one position to another with the same pay code
- If a record was entered incorrectly and retro is owed
- If scheduled hours, days or FTE% change



#### **Let's Talk Dates**

To understand how these Effective Dated records work, it's important to first understand the purpose of the various dates that appear in Employee Job/ Salary. The three dates we will be focusing on in this area include

- Effective Date
- Position Start/ End Dates
- Pay Start/ End Dates

#### **Effective Date**

A good way to think of the Effective Date field is to see it as the point in time a pay has a major change. For a new hire employee, the Effective Date would typically be the date they are hired. If an employee receives a promotion, a new Effective Date would reflect that change etc. Pay records will not be generated into payroll until the Effective Date is reached. We will be discussing how to properly use Effective Dates in more depth a little further in.

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← Q		+		×	Ð	÷	٩	ß	E
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Employee Identification									
Employee * SSN		Last I	Name			First I	Name		
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MAIN CYCLES/OTI	HER NEX	(Т СНА	NGE	CIVIL SERV	/ICE				
Job Class *	FRFI			FIREFIGH	TER				
Summary Job Class	FR	F	IRE						
Position *	000022008	)	ANINU		KEFIGHTER V				
Pay Type *	111		ANNU	JAL SALAK	N/2010				
Effective Date "	✓ Primar	9 v Job/P	osition	10:04/5	0/2019				
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Position Start/End *	220 510		MENIT	12/31/99	199 🗉	3	-		
Group/BLL*	10 EIDE	DEPARI	WENT				-		
Status	ET - ELILL	TIME					- -		
Risk Code	4000	111112	••• PR	OTECTION	/SERVICES				
Pay Start/End *	01/01/201	0		<u>₩</u> /	12/21/0000	00	1		
Pay Freq *	B - BIWEE	KI V			12/01/0000	-	5		
Grade/Step	FRFI	. /	4	6	FIREFIGHTE	R			
Allocation	0			Ν					
				N					
Allocation Detail									
PA Type Project String					ТА	ccount			
					XI.				

The Effective Date in the above example shows that this pay record is effective between 1/1/19 and 4/30/19.



# **Position Start/ End**

Position Start and End Dates relate directly to Position Control. This date range will determine when the employee is occupying the Position assigned on their Employee Job/ Salary record.

Q       Image: Constraint of the second	🔅 Employee	Job/Salary			
Employee Identification         Employee *       SSN       Last Name         62614        987-93-7849       MOWRY         MAIN       CYCLES/OTHER       NEXT CHANGE       CIVIL SERVICE	e C Earch Bro	xwse Add Update	Delete Output	Print Display	DF S
Employee *     SSN     Last Name     First Name       62614      987-93-7849     MOWRY     SERRA	Employee Identification				
MAIN CYCLES/OTHER NEXT CHANGE CIVIL SERVICE	Employee * SSN 62614 987-93-	Last Name 7849 MOWRY		First Name SERRA	
Job Class * FRFI FIREFIGHTER Summary Job Class FR FIRE Position * 000022006 FIREFIGHTER Pay Type * 111 ANNUAL SALARY Effective Date * 01/01/2019 to: 04/30/2019 ✓ Primary Job/Position	Job Class * Summary Job Class Position * Pay Type * Effective Date *	FRFI          F           FR         FIRE         000022006           111          ANNUA           01/01/2019         Image: Comparison           ✓         Primary Job/Position	IREFIGHTER IREFIGHTER L SALARY to: 04/30/2019		
Position Start/End *       01/01/2019       )       /       12/31/9999         Location *       220 - FIRE DEPARTMENT       •         Group/BU *       18 - FIRE       •         Status       FT - FULL TIME       •         Risk Code       4000       •       PROTECTION/SERVICES	Position Start/End * Location * Group/BU * Status Risk Code	01/01/2019 🛗 / 220 - FIRE DEPARTMENT 18 - FIRE FT - FULL TIME 4000 PROT	12/31/9999	1 	
Pay Start/End *       01/01/2019       12/31/9999         Pay Freq *       B - BIWEEKLY       Image: Comparison of the start star	Pay Start/End * Pay Freq * Grade/Step Allocation	01/01/2019 B - BIWEEKLY FRFI / 4 0	12/31/9999 FIREFIGHTE	R	
Allocation Detail	Allocation Detail		т	count	

The Position Start/ End Dates above show that the employee started occupying their position on 1/1/19 and has the default end date of 12/31/9999.

#### Pay Start/ End

This date range is used in Payroll Processing and determines if this pay code will be include in payroll. The Start Date will typically be the start of the first payroll in which they are to be paid this code. The End Date would typically be set to the end date of the last payroll for that pay code.



🔆 Er	nploy	/ee Job	/Salar	y						
<b>E</b> Back	<b>Q</b> Search	III Browse	+ Add	Update	× Delete	<b>⊡</b> Output	🖶 Print	Display	DF	E Sa
Employee Ide	entificati	on								
Employee * 62614	SSN 987	l 7-93-7849	Last MC	Name WRY			First SERF	Name RA		
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Allocation De	etail	na				Т Д	ccount			

The Pay Start/ End Dates on this record show that the employee would pull into payroll starting 1/1/19 and would continue until an end date is set.

## **Using Effective Dated Records**

Now that we have gone over what the different dates do, let's see how you can use Effective Dated records to simplify your current practices. We're going to cover several different scenarios where Effective Dates can be used and what the impact will be for each:

- New Hire
- Pay Change
- Retro Pay Change
- Termination
- Position Change

#### **New Hire**

The first example we'll dive into will also be the easiest. When entering a base pay for a new hire employee, the Effective Date will default to today's date, but should typically be adjusted to reflect the employee's first day of work.



😑 🤹 Emp	oloyee Job/Salary						
Eack Accept	Cancel						
Employee Identification	n						
Employee *	SSN Last Name	First Name	MI Suffix	Status			
686	089-04-9503 MOWRY	SERRA		A - ACTIVE -			
MAIN CYC	LES/OTHER NEXT CHANGE CIVIL SERVICE						
Job Class *	FCL1 ···· CLERK I				Calc Code	11 D Hours/Day	8.00
Summary Job Class	FD FINANCE				Num Pays *	26.000 Hours/Year	2080.00
Position *	13526 ··· CLERK I				Days/Year *	260.00 Days/Period	10
Pay Type *	111 ··· ANNUAL SALARY				Sched Hours *	80.00 Factor	1.0000
Effective Date *	01/01/2020 Tot: 12/31/9999				Pay Basis	A Remain	
	Primary Job/Position					Off-Step/Frozen	N - No *
Position Start/End *	01/01/2020 0 / 12/31/9999 0					Pay Status	A - ACTIVE 👻
Location *	135 - FINANCE DEPARTMENT				Pay Amounts		
Group/BU *	10 - NON UNION				FTE % *	1.0000	
Status	FT - FULL TIME				Hourly Rate	13.4595	
Risk Code	5000 ··· ADMINISTRATION SERVICES				Daily Rate	107.6758	
Pay Start/End *	01/01/2020 🖬 / 12/31/9999 🖬				Period Pay	1,076.76	
Pay Freq *	B - BIWEEKLY *				Annual Pay	27,995.71	
Grade/Step	CLR1 / 1				Remaining	.00	
Allocation	0				Reference	27,995.71	
Allo antian Datail							
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PA Type Project St	ring Org	Object Project	Loc	Grant Amount	Hours	Percent	
	111350	000 5111	135	27995.71	80.00	100.000000	

In this example, you can see that the employee, Serra Mowry was hired 1/1/2020. They have an Effective Date reflecting when the employee is hired, Position start stating that they are filling the position as of 1/1/20 and pay start of 1/1/20 which would include them in any payrolls on or after that date. The end dates of all these fields are set to 12/31/9999 by default since this employee currently has no plans of leaving.

## **Pay Rate Change**

The next scenario we will address is an employee pay rate change within the same position. For this example, our employee, Serra Mowry will be moving from step 1 to step 2 as of 2/1/2020. To enter a pay change for an employee open Employee Job/Salary, search for their current pay record, then click Duplicate on the Munis Ribbon.

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= 🐝 Emp	oloyee Job/Salary															
← Q Back Search	Image:	etput Print Display PD	Save Dicel	Word Ema	al Schedule	Attach Dig	licate Text	Giobal Add:Del Update	Project Receiv	B Reset Pays	Mid-Vear Reset	E Sched Hours	View History	Single Emp Increase	GL Asst Find	Project String Find
Employee Identificatio	n															
Employee * S	SSN Last Name	First N	ame		MI Suffix	Status										
686	089-04-9503 MOWRY	SERI	RA.			A - ACTIVE	Ŧ									
MAIN CYC	LES/OTHER NEXT CHANGE	CIVIL SERVICE														
Job Class *	FCL1 ··· CLERK I							Calc Code		Hours/Day		8.00	0.0			
Summery Job Class	FD FINANCE	84.1						Num Pays *	26.00	0 Hours/Year		2080.	.00			
Pay Type *	111 ··· ANNUAL SALARY							Sched Hours *	80.0	0 Eastor						
Effective Date *	01/01/2020 to: 12/31/9	999						Pay Basis	A	Remain		26.000				
	Primary Job/Position									Off-Step/Fro	zen	N - No				
Realities Start Ford a	01/01/2020 //	(0000 73								Pay Status		A - ACTIVE				
Position start/End *	125 - EINANCE DEPARTMENT							Pay Amounts								
Group/BU *	10 - NON UNION							FTEN			Recurring	Pay				
Status	FT - FULL TIME	*						Hourly Rate		13.4595	13.4595					
Risk Code	5000 ADMINISTRAT	10N SERVICES						Daily Rate		107.6758	107.6758	3				
Pay Start/End	01/01/2020	12/31/9999						Period Pay		1,076.76	1,076.76					
Pay Freg *	B - BIWEEKLY *							Annual Pay	2	7,995.71	27,995.7	1				
Grade/Step	CLR1 - / 1 -	CLERK I						Remaining		.00						
Allocation	0 1							Reference		27,995.71						
Allocation Detail																
PA Type Project Str	ring	Org	Object	Project	Loc	Grant	Amount	Hours	Percent							
		11135000	5111		135		27995.71	80.00	100.000000							

Upon duplication, the Effective Date is automatically highlighted. Enter the date that the pay change will go into effect and make any needed changes to Grade/ Step or the Pay Amounts area.

= 🤸 Emp	oloyee Job/Salary								
← ↓ ✓ Back Accept	Cancel								
Employee Identificatio	n								
Employee *	SSN Last Name	First Name	MI	Suffix	Status				
686	089-04-9503 MOWRY	SERRA			A - ACTIVE	-			
MAIN CYC	ELES/OTHER NEXT CHANGE CIVIL SERVICE	E							
Job Class *	FCL1 ··· CLERK I				Calc Code	11	Hours/Day	8.00	
Summary Job Class	FD FINANCE	3			Num Pays *	26.000	Hours/Year	2080.00	
Position *	13526 ··· CLERK I				Days/Year *	260.00	Days/Period	10	
Pay Type *	111 ANNUAL SALARY				Sched Hours *	80.00	Factor	1.0000	
Effective Date *	02/01/2020 to: 12/31/9999				Pay Basis	A	Remain	26.000	
	Primary Job/Position						Off-Step/Frozen	N - No 🐨	
Position Start/End *	01/01/2020						Pay Status	A - ACTIVE -	
Location *	135 - FINANCE DEPARTMENT	-			Pay Amounts				
Group/BU *	10 - NON UNION				FTE % *	1.0000	Recu	rring Pay	
Status	FT - FULL TIME	*			Hourly Rate	1	3.4595 13.4	595	
Risk Code	5000 ··· ADMINISTRATION SERVICES				Daily Rate	10	7.6758 107.	6758	
Pay Start/End *	01/01/2020	ה			Period Pay	1,	076.76 1,076	5.76	
Pay Freq *	B · BIWEEKLY	_			Annual Pay	27,	995.71 27,9	95.71	
Grade/Step	CLR1 / 2 CLERKI				Remaining		.00		
Allocation	<b></b>				Reference		27,995.71		
Allocation Detail									
PA Type Project St	ring Org	Object Project		Loc	Grant	Amount Ho	urs Pe	rcent	
-	] [11135	000 ] [5111 ]		135	279	95.71 80.0	0 100.000	000	

Note that the Position Start/ End and Pay Start/ End dates do not change. This is because the employee isn't changing Positions or Pay Codes, only the rate. This same process could be used for scheduled hour or day changes by adjusting the appropriate fields.



Once the record is saved, the original pay record will now have an effective end date of 1/31/2020 and will not appear in a Current Search. To look up a historical record, utilize one of these options: All, Historical, or Specific Date. There will be more on the search methods later in this document.

= 🐝	Employee Job/Salar	у										
← ↓ ↓ Back Act	cept Cancel Query	GL Acct Find Project String Fi	t nd									
Employee Ident	ification											
Employee *	SSN I	ast Name			First Na	me		MI S	offix	Stat	us	
		a a traine										-
Search Period	Current () All (	O Historical O	Future 🔿	Specific Date								
= 🌾 Emp	loyee Job/Salary											
← Q Back Search B	Browse Add Update Delete O	etput Print Display P	DF Save B	Excel Word Ema	al C	Attach	Text Global Glo Add/Del Upo	bal Project R late Update	R B ecalc Reset Pays	Mid-Year Reset	H Sched Hours	View History Sing
Employee Identificatio	n											
Employee * S	ISN Last Name	First	Name		MI Suffix	Status						
MAIN CYC	LES/OTHER NEXT CHANGE	CIVIL SERVICE										
Job Class *	FCL1 ···· CLERK I						Calc Code	11	Hours/Day		8.00	
Summary Job Class	FD FINANCE	BK I					Num Pays *	26	000 Hours/Year	ŀ	2080.0	
Pay Type *	111 ··· ANNUAL SALARY						Sched Hours *	8	0.00 Factor		1.0000	
Effective Date *	01/01/2020 🖬 to: 01/31/2	020					Pay Basis	A	Remain		26.000	
	Primary Job/Position								Off-Step/Fro	zen	N - No	Ŧ
Position Start/End *	01/01/2020 🖬 / 12/31/	/9999 🖬							Pay Status		A - ACTIVE	Ψ.
Location *	135 - FINANCE DEPARTMENT	Ψ					Pay Amounts					
Group/BU *	10 - NON UNION	Ψ					FTE % *	1.0000		Recurring	) Pay	
Status	FT - FULL TIME	Ŧ					Hourly Rate		13.4595	13.4595		
Risk Code	5000 ··· ADMINISTRAT	ION SERVICES					Daily Rate		107.6758	107.675	8	
Pay Start/End *	01/01/2020 🖬 /	12/31/9999 🖬					Annual Pay		27 995 71	27.995.7	1	
Pay Freq *	B - BIWEEKLY *	015041					Remaining		.00			
Allocation		ULERN I					Reference		27,995.71			
Allocation Detail												
PA Type Project Str	ing	Org	Object	Project	Loc	Grant	Amount Hours	Perce	nt			
		11135000	5111		135	279	995.71 80.00	100.00000	0			

## **GL Change**

In a situation where an employee is charged to a different GL account, we can use effective dated records to track the change. This will allow Munis to hold a complete history of which accounts were used for specific time frames and will allow these to change automatically when the effective date is reached. For this example, we will be moving AJ McKnight from allocation 22 to 1050 effective 3/1/2020. To begin this process first search for the employee's current pay record and select the Duplicate option on the Munis Ribbon.



😑 🧐 Emp	oloyee Job/Sa	lary																					
← Q Back Search	Browse Add	Update	Delete	Ð Output	<b>Print</b>	<b>O</b> Display	PDF	B Save	<b>⊥</b> Exce	e Word	Email	() Schedule	0 Attach	- Du	D	Text	Giobal Add/Del	U Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	Sche
Employee Identificatio	n																						
Employee *	SSN	Last Nar	ne				First Name				MI	Suffix	Sta	tus									
701	654-98-7364	MCKN	IIGHT				AJ						A	- ACTIVE	Ŧ								
MAIN CYC	LES/OTHER	NEXT	CHANGE	CI	VIL SE	RVICE																	
Job Class *	SUPR		PARKS AND	D REC SUP	ERVISOR									Calc Code		11	۵	Hours/Da	ey.		8.00		
Summary Job Class	PR F	PRKS RECF	RE											Num Pays	•		26.000	Hours/Ye	ar		2080.00		
Position *	17701		P/	ARK SUPER	RVISOR									Days/Year	*		260.00	Days/Per	iod	10			
Pay Type *	111	ANNUA	AL SALARY											Sched Hou	rs *		80.00	Factor			1.0000		
Effective Date *	01/01/2020		to: 12/31	1/9999										Pay Basis		Α		Remain			26.000		
	Primary Job/P	osition																Off-Step/	Frozen	N - N	0	*	
Position Start/End *	01/01/2020		/ 12/	/31/9999														Pay Statu	18	A - A	CTIVE	Ŧ	
Location *	177 - PARKS A	ND RECR	EATION DE	PART		-								Pay Amou	ints								
Group/BU *	10 - NON UNIO	N				+								FTE % *		1.00	000		Recurr	ring Pay			
Status	FT - FULL TIME					-								Hourly Rate	•		2	1.6313	21.63	13			
Risk Code														Daily Rate			17:	3.0504	173.0	504			
Pay Start/End *	01/01/2020			/ 12	/31/999	9 🖬								Period Pay			1,	730.50	1,730	.50			
Pay Freq *	B - BIWEEKLY			-										Annual Pay			44,	993.11	44,99	3.11			
Grade/Step	PSP	/	1	··· PAR	K SUPER	ISOR								Kemaining				.00					
Allocation	22		ALLO	CATION 22	2									Reterence				44,993.1					
Allocation Detail																							
PA Type Project Str	ring				Or	g		Object		Project		Loc	Grant		Am	nount	Hou	ırs	Per	cent			
					16	177000		5110				177			3149	5.18	56.0	00	70.000	000			
E BLDG	-PHASE1 -SALA	RY -LAE	BORBEN		16	177000		5110				177			1349	7.93	24.0	00	30.000	000			



Start by setting the Effective Date to when the Account change takes place. Next you can update either the Allocation or the GL information to the appropriate account.

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mployee * S	ISN Last Name	First Name		MI Suffix	Status			
701	654-98-7364 MCKNIGHT	AJ			A - ACTIVE	Ŧ		
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Job Class *	SUPR PARKS AND REC SUPERVISOR				Calc Code	11 📮 Hou	rs/Day 8.00	
Summary Job Class	PR PRKS RECRE				Num Pays *	26.000 Hou	rs/Year 2080.00	
Position *	17701 ··· PARK SUPERVISOR				Days/Year *	260.00 Days	s/Period 10	
Pay Type *	111 ANNUAL SALARY				Sched Hours *	80.00 Fact	tor 1.0000	
Effective Date *	03/01/2020 to: 12/31/9999				Pay Basis	A Rem	nain 26.000	
	Primary Job/Position					Off-5	Step/Frozen N - No	-
Position Start/End *	01/01/2020 🚺 / 12/31/9999 🖬					Pay	Status A - ACTIVE	-
.ocation *	177 - PARKS AND RECREATION DEPART	-			Pay Amounts			
Group/BU *	10 - NON UNION	<b>*</b>			FTE % *	1.0000	Recurring Pay	
Status	FT - FULL TIME	-			Hourly Rate	21.63	13 21.6313	
Risk Code					Daily Rate	173.05	04 173.0504	
Pay Start/End *	01/01/2020 12/31/9999				Period Pay	1,730.5	50 1,730.50	
Pay Freq *	B - BIWEEKLY -				Annual Pay	44,993.	11 44,993.11	
Grade/Step	PSP / 1 PARK SUPERVI	SOR			Remaining		00	
Allocation	1050 ··· STREET LIGHT PROJECT				Reference	44,9	93.11	
Allocation Detail								
PA Type Project Str	ing Org	Object	Project	Loc	Grant	Amount Hours	Percent	
	] [14	172255 5110	1050	177	224	496.55 40.00	50.000000	
	] [ 11	C6 5110	1050	] [177	224	496.56 40.00	50.000000	

Once you hit accept you will now have 2 records for that employees pay, one with the historical account and its effective dates and another with the new pay effective date and account.

## **Retro Pay Change**

Sometimes events such as contract negotiations prevent pre-emptive pay changes, creating the need for retro pay. Prior to going to Employee Job/Salary, check that the Payroll Control Setting for "Enable Retro Pay Processing by Effective Date" is set to Y. Once enabled, go to Employee Job/Salary, search for an employee's the Current pay record, then select the Duplicate option from the menu. For this example, the employee, Rodger, has already been paid with the 2/2/20 - 2/14/20 payroll but should have received a rate change on 2/1/20.



= 🐝 Emp	oloyee Job/Sa	lary																					ľ
← Q Back Search	Browse Add	Update I	Delete	Dutput	Print	(O Display	POF	Save	Excel	Word	Email	Schedule	0 Attach	-	D Duplicate	Text	Giobal Add/Del	Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	H Sched Hou
Employee Identificatio	n																						
Employee *	SSN	Last Name	2			F	irst Name				MI	Suffix	St	atus									
702	654-93-4321	JONES					RODGER							A - ACTI	/E	-							
MAIN CYC	LES/OTHER	NEXT C	HANGE	CI	VIL SER	VICE																	
Job Class *	2 Class * S291 PSYCHOLOGIST														de	32		Hours/D	ay		7.00		
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Position *	aition * 92369 ···· PSYCHOLOGIST													Days/Ye	ar *		185.00	Days/Pe	riod	0			
Pay Type *	111	ANNUAL	. SALARY											Sched H	ours *		0.00	Factor			1.0000		
Effective Date *	01/01/2020		to: 12/3	1/9999										Pay Bas	s	A		Remain			26.000		
	Primary Job/Po	osition																Off-Step	/Frozen	N - N	lo	Ŧ	
Position Start/End *	01/01/2020		/ 12	/31/9999														Pay Stat	us	A - A	CTIVE	Ŧ	
Location *	9900 - ELEMEN	TARY SCH	100L 5			Ŧ								Pay An	ounts								
Group/BU *	9200 - TEACHE	RS				Ŧ								FTE % *		1.0	0000		Recu	rring Pay			
Status	FT - FULL TIME					Ŧ								Hourly F	ate		2	21.4170	21.4	170			
Risk Code	2000	1	PROFESSI	ONALS										Daily Ra	te		14	9.9189	149.	9189			
Pay Start/End *	01/01/2020			/ 12	/31/9999									Period P	ау		1	,066.73	1,06	6.73			
Pay Freq *	B - BIWEEKLY			-										Annual I	Pay		27	,735.00	27,7	35.00			
Grade/Step	A	/	1	ВА										Remaini	ng			.00					
Allocation	0													Referen	e			27,735.	00				
Allocation Detail																							
PA Type Project Str	ring				Org			Object		Project		Loc	Gra	nt		Amount	Ho	urs	Pe	ercent			
					990	00001		7013				9900		]	277	735.00	0.	.00	100.00	0000			

When the Duplicate screen opens, enter the date the change *should* have taken place in the Effective Date field (e.g. 2/1/2020). Enter any other changes that apply to this instance (For this example Rodger is moving from Step 1 to Step 2).

e Identificatio	n								
yee* s	ISN Last Name		First Name	MI	Suffix	Status			
702	654-93-4321 JONES		RODGER			A - ACTIVE	Ŧ		
IAIN CYC	LES/OTHER NEXT CHANGE	CIVIL SERVICE							
b Class *	S291 PSYCHOLOG	ST				Calc Code	32	Hours/Day	7.00
mmary Job Class	COUN COUNSELOR					Num Pays *	26.000	Hours/Year	1295.00
ition *	92369 ··· PSY	CHOLOGIST				Days/Year *	185.00	Days/Period	0
Type *	111 ANNUAL SALARY					Sched Hours *	0.00	Factor	1.0000
tive Date *	02/01/2020 to: 12/31/9	1999				Pay Basis	A	Remain	26.000
	Primary Job/Position							Off-Step/Frozen	N - No *
aition Start/End *	01/01/2020	1/9999						Pay Status	A - ACTIVE -
ation *	9900 - ELEMENTARY SCHOOL 5	•	7			Pay Amounts			
p/BU *	9200 - TEACHERS	-	Ĵ			FTE % *	1.0000	Recu	rring Pay
19	FT - FULL TIME	-	j			Hourly Rate	2	1.4170 21.4	170
Code	2000 ··· PROFESSION	ALS	-			Daily Rate	14	9.9189 149.	9189
Start/End *	01/01/2020	12/31/9999 🗊				Period Pay	1	066.73 1,06	6.73
y Freg *	B - BIWEEKLY					Annual Pay	27	735.00 27,7	35.00
ade/Step	A / 2	ВА				Remaining		.00	
cation	0	-				Reference		27,735.00	
cation Detail									
A Type Project Str	ing	Org	Object	Project	Loc	Grant A	Amount Ho	urs Pe	ercent



When all changes have been made, click Accept. A pop-up will appear (see screenshot below), which will list payrolls the employee was included in after the Effective Date that was just applied. Clicking Continue will add any impacted pays within the payroll to the Process Retro Pay program (Included in Payroll Start/Status in Munis 2018.1+).



### **Pay End**

To end a pay for a departing employee or pay that is discontinuing, begin the process by searching for the employee's Current Job/ Salary records or Current individual Pay Code. Click Update and change the Pay End Date to the date the pay(s) should stop. Changing the base pay record will end for all the pays if the Payroll Control Settings are set to do so. For employees leaving a position, the Position End Date should also be populated. Do not delete or set the Pay Status to Inactive since these will interfere with Retro processing and State Reporting. In the below example this pay will end for Serra as of 2/29/2020.





# **Position Change**

Next we will address an employee who is changing Positions. Use Search to find the employee's Current base pay record for the Position the employee is leaving.

← Back	Q Search	Browse	+ Add	Update	) Delete	Output	Print .	<b>O</b> Display	PDF	<b>B</b> Save	Excel	Word	<b>M</b> Email	() Schedule	0 Attach	*	Duplicate	Text	Giobal Add/Del	Global Update	Project Update	R Recalc	B Reset Pays	Mid-Year Reset	Scher
Employee I	dentificat	ion																							
Employee *		SSN		Last Na	ne				First Name				MI	Suffix	s	Status									
	700	321-65-7	894	VALO	RE				CHERYL							A - ACT	IVE	Ŧ							
MAIN	Cì	CLES/OT	HER	NEXT	CHANGE	CI	/IL SEF	RVICE																	
Job Class *		S220			TEACHER	LEMENTAR	Y SCHO	OL								Calc C	ode	32		Hours/D	ау		7.00		
Summary J	ob Class	TCHR	IR TEACHER													Num Pays *			26.000 Hours/		bar		1295.00		
Position *		9231	92319 ··· TEACHER ES 2													Days/Y	Days/Year* 185.00 Days/Pe				eriod 0				
Pay Type *		1	11	ANNU	AL SALARY											Sched	Hours *		0.00	Factor			1.0000		
Effective D	ate *	01/01/	2020		to: 12/3	/9999										Pay Ba	oio	A		Remain			26.000		
		Prir	nary Job/F	osition																Off-Step	/Frozen	N - N	0	Ŧ	
Position St	art/End *	01/01	/2020	i i	/ 12	/31/9999														Pay Stat	15	A - A	CTIVE	~	
Location *		9600	- ELEMEN	NTARY SO	HOOL 2			-								Pay A	mounts								
Group/BU *		9200	- TEACHE	ERS				Ŧ								FTE %	•	1.0	0000		Recur	ring Pay			
Status		FT - F	ULL TIME					Ŧ								Hourly	Rate		2	3.2017	23.20	017			
Risk Code		2000			PROFESS	ONALS										Daily R	late		16	2.4122	162.4	4122			
Pay Start/E	ind *	01/01	2020			/ 12/	31/999	9 🖬								Period	Pay		1,	155.63	1,155	5.63			
Pay Freq *		B - BIV	VEEKLY			-										Annual	Pay		30,	046.25	30,04	16.25			
Grade/Step		A		/	2	ВА										Remain	ning			.00					
Allocation			0													Refere	nce			30,046.	25				
Allocation	Detail																								
PA Type	Project	String					Or	9		Object		Project		Loc	Gra	ant		Amount	Ho	urs	Pe	rcent			
							96	011101		7005				9600	[		300	046.25	0.	00	100.000	0000			

1 of 5 |< < > >|

Click Duplicate and enter the new Job Class, Position, Effective Date and salary information for the switch. For this example, the new Position start date will be 3/6/2020.





😑 🐝 Emp	loyee Job/Salary					
e Accept (	Sarcei					
Employee Identification	n					
Employee * S	SN Last Name	First Name	MI Suf	îx Status		
700	321-65-7894 VALORE	CHERYL		A - ACTIVE	Ŧ	
MAIN CYC	LES/OTHER NEXT CHANGE CIVIL SERVICE					
Job Class *	S220 TEACHER ELEMENTARY SCHOOL			Calc Code	32 D Hours/Da	ay 7.00
Summary Job Class	TCHR TEACHER			Num Pays *	26.000 Hours/Ye	ter 1295.00
Position *	111 ANNUAL SALARY			Sched Hours	0.00 Factor	1,0000
Effective Date *	03/01/2020			Pay Basis	A Remain	26.000
	Primary Job/Position			,	Off-Step/	Frozen N - No -
					Pay Statu	A - ACTIVE -
Location *	9700 - ELEMENTARY SCHOOL 3	-		Pay Amounts		
Group/BU *	9200 - TEACHERS	-		FTE % *	1.0000	Recurring Pay
Status	FT - FULL TIME	- -		Hourly Rate	23.2017	23.2017
Risk Code	2000 ···· PROFESSIONALS			Daily Rate	162.4122	162.4122
Pay Start/End *	01/01/2020 2 / 12/31/9999 3			Period Pay	1,155.63	1,155.63
Pay Freq *	B - BIWEEKLY -			Annual Pay	30,046.25	30,046.25
Grade/Step	A / A BA			Remaining	.00	
Allocation	0			Reference	30,046.2	25
Allocation Detail						
PA Type Project Stri	ing Ora	Object Pro	iect Loc	Grant	Amount Hours	Percent
	] [970111]	01 7005		0 0 300	146.25 0.00	100 000000
1 of 5  < <	Enter employee's position code					

As long as the Primary Job/ Position flag is selected you will see the pop up below when you save your record. Selecting yes on this pop up will automatically end date the old Position information as of the day before the new Effective Date.



= 🔆 Employee Job/Salary

Employee Identificat	ion														
Employee *	SSN	Last Name	Firs	at Name	М	Suffix	Status								
700	321-65-7894	VALORE		HERYL			A - ACTIVE	*							
MAIN CY	CLES/OTHER	NEXT CHANGE	CIVIL SERVICE												
Job Class *	\$220	TEACHER ELEN	IENTARY SCHOOL				Calc Code	32	Hours/Day	7.00					
Summary Job Class	TCHR	TEACHER					Num Pays *	26.00	0 Hours/Year	1295.00					
Position *		92329 ··· TEACH	HER ES 3				Days/Year *	185.0	0 Days/Period	0					
Pay Type *	111	ANNUAL SALARY								1.0000					
Effective Date *	03/01/2020	03/01/2020 to: 12/31/9999 Uplicating Primary Pay To New Job/Position													
	Primary Job/	Position								I - No	-				
Position Start/End *	01/01/2020	<b>1</b> / 12/31/	0000 17	You are	duplicating a base	pay marked a	is primary to a diffe	erent job/posit	ion combination.	- ACTIVE	Ŧ				
Location *	9700 + ELEME	NTARY SCHOOL 3		date us	date using the old job/position will automatically be end-dated to avoid having overlapping										
Group/BU*	9200 - TEACH	IFRS	· · · · · · · · · · · · · · · · · · ·	pays ma	arked as primary fo	Pay									
Status	FT · FULL TIM	IE													
Risk Code	2000	PROFESSIONA	LS	If you w	rish to continue, ch	oose 'Yes'; oth	ierwise, choose 'No	o' to edit the re	cord.						
Pay Start/End *	01/01/2020	I /	12/31/9999			Ve	No	ſ							
Pay Freq *	B - BIWEEKLY	*				163		J							
Grade/Step	A	/ 4	BA				Remaining		.00						
Allocation							Reference		30,046.25						
Allocation Detail															
PA Type Project :	String		Org	Object	Project	Loc	Grant	Amount	Hours Perc	ent					
			07044404	7005				46.95	100.0000						

1 of 5 |< < > >|



#### **Searching Pay History**

One of the biggest impacts of using Effective Dated records is how history displays. From Employee Job/ Salary, when searching for a pay record you'll now notice a Search Period where you can select Current, All, Historical, Future, or Specific Date. With this added functionality, pays can be searched by history (within Munis), at a specific point in time, or any future dated pays based on the Effective Date. *NOTE: When searching if you do not see a record you are looking for, check the search period selected (I.E. All may show too much, Current may not show a pay code that ended last week).* 

≡ 🐝 Employee Job/Salary												
← ✓ ⊗ Hack Accept Cancel Query	GL Acct Find Project String Find											
Employee Identification												
Employee * SSN	Last Name	First Name	MI Suffix	Status								
Search Period O Current ()	All O Historical O Future O	Specific Date										

The following is an example of the history for an employee starting on 01/01/2020 and receiving a pay increase on 2/1/2020. You can see that the Effective Dates reflect the period in which these records are active.

<ul> <li></li></ul>	
Employee Identification           Employee Identification           Employee *         SSN         Last Name         First Name         MI         Suffix         Statue           686         089-04-9503         MOWRY         SERRA         A - ACTIVE *           MAIN         CYCLES/OTHER         NEXT CHANGE         CIVIL SERVICE           Job class *         FDL1	Recalc Reset Pays Mid-Vear Sched Hour
Employee*         SSN         Last Name         First Name         NI         Suffix         Statue           686         089-04-9503         MOWRY         SERRA         A - ACTIVE *           MAIN         CYCLES/OTHER         NEXT CHANGE         CIVIL SERVICE           Job Class *         FDL1         -         CLERK I         Calc Code         11         Hours/Day           Summary Job Class         FD         FINANCE         Num Pays *         26.000         Hours/Pay           Peation *         13526	
686         089-04-9503         MOWRY         SERRA         A - ACTIVE         +           MAIN         CYCLES/OTHER         NEXT CHANGE         CIVIL SERVICE         Image: Control of the co	
MAIN         CYCLES/OTHER         NEXT CHANGE         CIVIL SERVICE           Job Class*         FCL1         CLERK I         Calc Code         11         Image: Hours/Day           Summary Job Class         FD         FINANCE         Num Pays*         25:000         Hours/Day           Position*         1352.6	
Job Class*         FCL1         CLERK1         Calc Code         11         Moura/Day           Summary Job Class         FD         FINANCE         Nm Pays*         25.000         Hours/Vear           Position*         13256	
Summary Job Class         FD         FINANCE         Num Pays *         25.000         Hours/Year           Position *         13256	8.00
Position*         13526          CLERK I         Days/Year*         260.00         Days/Period           Pay Type*         111          ANNUAL SALARY         Sched Hours*         80.00         Fector           Effective Date *         01/01/2020         Its co1/31/2020         Effective Control         Pay Basis         A         Remain	2080.00
Pay Type*         111         ANNUAL SLLARY         Sched Hours*         80.00         Factor           Effective Date *         01/01/2020         II         tc: 01/31/2020         Pay Basis         A         Remain	10
Effective Date * 01/01/2020 Lai to: 01/31/2020 Pay Basis A Remain	1.0000
Old Para (France	26.000
Finary Job/Postion     Uni-step /rioten     Primary Job/Postion     Partial	
Position Start/End * 01/01/2020 C / 12/31/9999 C	A AGINE .
Location* 135 - FINANCE DEPARTMENT - Pay Amounts	
Group/BU* 10.NON UNION + FE %* 1.0000 Meeur	ring Pay
Status         FIT-FULL   ME         mounty nate         13,433         14,133	90 5758
NIX-CODE 2000 - ADMINISTRATION SERVICES	.76
Pay Start/End * 01/01/2020 C / 12/31/9999 C Annual Pay 27,995.71 27,995	15.71
Pay req B - DIVERLY	
Callection 0	
Allocation Detail	
PAType Project String Org Object Project Loc Grant Amount Hours Per	rcent
11135000 5111 135 2799571 80.00 100.000	000





= 🔆 Emp	oloyee Job/Sal	ary																						
← Q Back Search	Rrowse Add	Update	Delete	<b>∂</b> Cutput	Print .	© Display	PDF	B Save	<u>≢</u> Eccel	Word	<b>M</b> Email	() Schedule	0 . Attach	Duplicate	Text	Global Add/Del	Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	H Sched Hours	Vie	
Employee Identificatio	on																						_	
Employee *	SSN	Last Nam	e			F	irst Name				MI	Suffix	Status											
686	089-04-9503	MOWR	Y				SERRA						A - A	CTIVE	-									
MAIN CYC	CLES/OTHER	NEXT	CHANGE	CI	IVIL SEI	RVICE											~							
Job Class *	FCL1 ···· CLERK I											Cal	Calc Code 11 D Hours/Day						8.00					
Summary Job Class	ED FINANCE											Nu	n Pays *		26.000	Hours/Y	ear		2080.00					
Position *	13526 CLERK I												Day	o/Year*		260.00	Days/Pe	riod	10	1.0000				
Effective Date #	02/01/2020	- COL	*o: 12/2	1/0000									Pa	Pasia		00.00	Remain			26.000				
Effective bate	Primary Joh/Por	sition	10. 12/0	.,										Deala	<u> </u>		Off-Step	/Frozen	N - N	20.000	-			
		on on															Pay Stat	US	A - A	CTIVE	~			
Position Start/End *	01/01/2020		/ 12	/31/9999									Da	Amounte										
Location *	135 - FINANCE L	PEPARIN	IENI										ETC * * 1 0000 Peruviae Pau											
Status	ET - EUL TIME					-							Ho	rly Rate	In Price 12 9200 12 920					19 F ay				
Risk Code	5000		ADMINIST	FRATION S	ERVICES								Dai	Daily Rate 110.5500 110.5500										
Day Chart (Fad *	01/01/2020		m	/ 10									Per	iod Pay		1	,105.60	1,10	5.60					
Pay Start/End -	B BINEEVIV			- 12	./ 21/ 999	19 18							Ani	ual Pay		28	,745.60	28,74	45.60					
Grade/Step	CLR1	/	2	- CLE	RKI								Rer	naining			.00							
Allocation	0 •	-	-										Ref	erence			28,745.	60						
Allocation Detail																								
PA Type Project St	ring				Or	9		Object		Project		Loc	Grant		Amount	Ho	urs	Pe	rcent					
					11	135000		5111				135		28	3745.60	80	.00	100.000	0000					

# Conclusion

Effective dates are a beneficial addition to the Employee Job Salary program and following the above recommendations will help you get the most out of Munis. Using effective dates will provide a better pay history record for employees, assist with retro pay calculations and automate when changes should take place.