Munis
Personnel Actions

Procedural Documentation

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TABLE OF CONTENTS

Personnel Actions

Objective

This document provides instructions on adding action codes, entering personnel actions, and inquiring and reporting on personnel actions.

Overview

Personnel Actions are used to initiate and process changes to an employee record without making direct entries into the Employee Master.

The Personnel Actions process allows you to distribute duties between different personnel and departments and provide detailed records of changes made. Personnel Actions also offers the convenience of being able to enter changes in advance and post them to the employee's records when the change actually becomes effective or after appropriate review and approval. This is particularly helpful when many changes need to be made in a short period of time (such as changes that come at the start of a school year). Using Personnel Actions, you can start entering data weeks or months in advance without impacting actual employee records until the appropriate date.

Personnel use the Actions Entry program instead of the Employee Master menu to initiate the actions process, carry it through to completion, apply it to live data, and create historical records that can be printed at any time. When you add, delete, or update a pay or deduction record, the action triggers the creation of an action history record specific to that pay or deduction record. If no pay or deduction records are modified, an action history record is still created, but without the salary data.

Note: Entering information too far in advance may result in invalid data. Employees can change positions or jobs, so entering step increases too far in advance could result in a pending action for a position that is no longer applicable.

Prerequisites

Before you can successfully use this feature, you must ensure that the necessary parameters and codes are in place. If parameters and codes are not set up, or not set up correctly, you may need to contact your Munis system administrator or department manager to have them updated or added into the Munis system.

Confirm the following:

- You have menu access to the Personnel Actions programs.
- All codes required for completing actions are available.

Rapid Entry

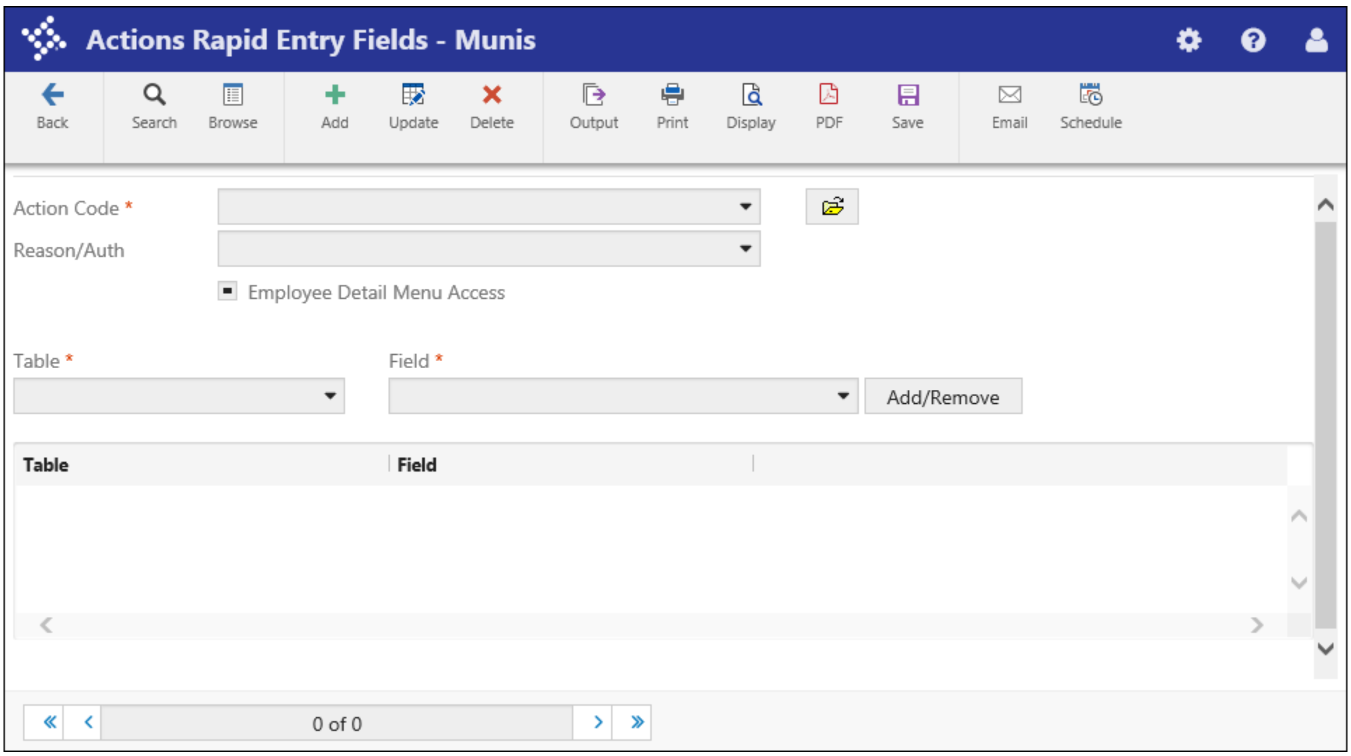
Rapid Entry allows you to enter actions by completing only those fields that are key to the record.

Using the Actions Rapid Entry Fields program, you can define a concise, custom screen for creating a Personnel Action Entry record by creating an action and reason code combination for which you can then identify required fields.

In order to use Rapid Entry, you must ensure that all action and reason/authorization codes have been created.

To use rapid entry:

1. Open the Actions Rapid Entry Fields program.
   Human Capital Management > Human Resources > Personnel Actions > Actions Rapid Entry Fields



2. Click Add.
3. Identify the action code and reason for the change.

Field	Description	Notes
Action Code	Identifies the action to include on the Rapid Entry form. Select an action code from the list; click the folder button to open the Action Codes program to add or update action codes.	
Reason/Auth	Provides the reason/authorization detail for the action. Select the applicable code from the list.	

Field	Description	Notes
Employee Detail Menu Access	If selected, directs the program to provide users access to additional employee detail available from the Detail option in the Personnel Actions Entry program.	
Table	Identifies the table (program) from which to select a specific field value to include on the Rapid Entry form.	
Field	Specifies the field from the selected table (program) to include on the Rapid Entry form.	

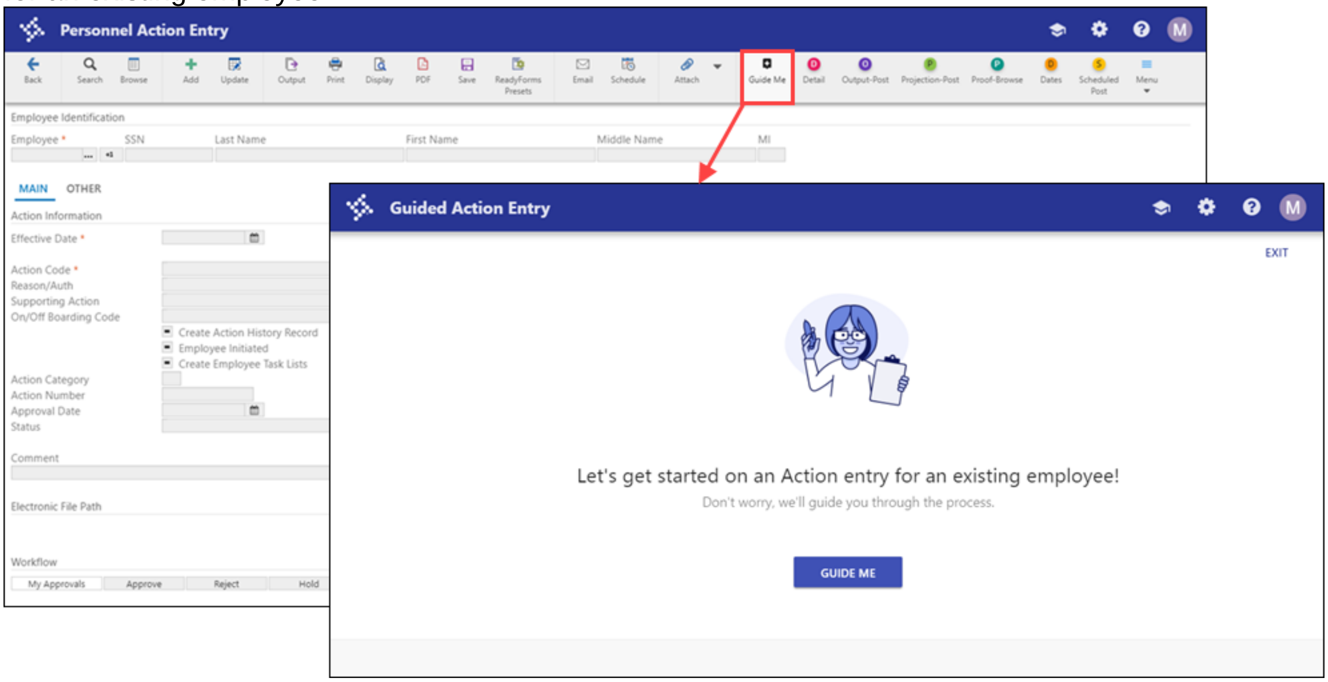
4. Click Add/Remove to add new table/field combinations to the form or to remove them.
5. When all fields are added, click Accept to save the form.

To use the Rapid Entry:

1. Open the Actions Entry program.
2. Click Add.
3. Enter the employee number and effective date.
4. Select the Action Code and Reason/Authorization combination defined in the Actions Rapid Entry Fields program.
5. Click Accept.
   The program opens the Action Rapid Entry screen, which includes only those fields defined for the Rapid Entry form.
6. Click Back to return to the Actions Entry screen, where you can continue processing the action.

Personnel Actions Entry—Guide Me

The Personnel Actions Entry Guide Me leads you through the process of entering a personnel action for an existing employee.



Before using the Guide Me, you must set up Guide Me templates in the Action Entry Templates program (formerly ESS Action Templates) and associate the necessary codes in the Action Codes and Action Reasons programs. See the Munis Personnel Actions Setup, Version 2019.1 for further information on Guide Me setup.

To use the Guide Me:

1. Open the Personnel Actions Entry program.
   Human Capital Management > Human Resources > Personnel Actions > Personnel Actions Entry

2. Click Guide Me on the toolbar to launch the guided actions entry.
   Click Guide Me to start the process.

3. Follow the guided steps to enter an action for an existing employee.

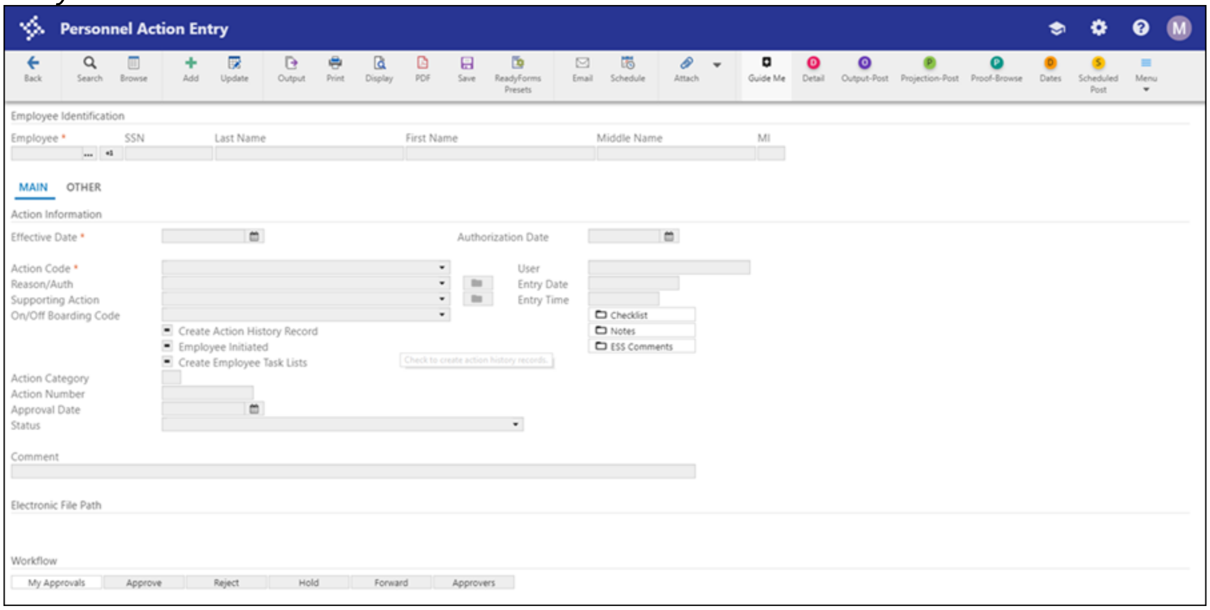
Personnel Actions Entry—New Hire

The Personnel Actions Entry program creates personnel records for new employees and applies them to live data.

To add a new employee using the Personnel Actions Entry program:

1. Open Personnel Actions Entry.
   Human Capital Management > Human Resources > Personnel Actions > Personnel Actions

Entry



2. Click Add to add a new personnel action.
3. Complete the fields, using the following table as a guide. Press Tab to move through the fields.

Field	Description	Notes
Employee	Contains the unique employee number for the new hire. Click +1 to select the next available number. (You must have View SSNs permissions to use this feature.) When you add a new employee number, the Pending Employee Master program opens for entry of required information.	
SSN	Contains the employee's Social Security number.	
Last Name First Name Middle Name MI	Contain the employee's last name, first name, middle name, and middle initial.	
Main Tab		
Action Information		
Effective Date	The effective date for the action. This date is used by the posting function to select actions for processing. You can change a default value.	
Action Code	Identifies the action code. The codes are created and maintained in the Action Codes program. This code determines what fields and screens are required and in what mode the screens display.	
Reason/Auth	Indicates the action authorization/reason code for the personnel action. Authorization/reason codes (AUTH) must	

Field	Description	Notes
	exist in the Payroll Miscellaneous Codes program.	
Supporting Action	Indicates the supporting action code for the action.	
On/Off Boarding Code	Specifies an on- or an off-boarding code to apply when this action is processed. On- and off-boarding codes are maintained in the On/Off Boarding Codes program. These codes outline steps that employees should complete in the first days of employment.	
Authorization Date	Allows your organization the option of specifying when an action is approved or authorized by a governing board or other approval group. This field is not required, the default value is blank, and it is available for searches.	
User	Identifies the user ID of the person who created the pending Actions Entry.	
Entry Date	Identifies the date the action was entered. This date is a key value in workflow data.	
Entry Time	Identifies the time the action was entered. You can use wildcard characters in this box to narrow search criteria. This date is a key value in workflow data.	
Create Action History Record	If selected, directs the program to create history records when you add, delete, or update a pay or deduction record.	
Employee Initiated	If selected, indicates that the action was initiated by the employee in Employee Self Service (ESS).	
Create Employee Task Lists	If selected, this check box directs that employee tasks should be created when you post this action.	
Action Category	Indicates the category for the personnel action (for example, B–Benefit Change).	
Action Number	Contains an action reference number, if applicable.	
Approval Date	The action approval date. The date is stored in history when the action is posted. You can change a default value.	
Status	Indicates the workflow status of actions. The program updates the value of this list as the workflow process progresses.	
Comment	Contains any comments regarding the record. You can enter up to 60 characters of text in this box.	
Electronic File Path	Displays the name of the file path for the electronic file.	

Field	Description	Notes
Other Tab		
Employee Information		
Job Class	Contains the employee's job class.	
Location	Contains the employee's primary location code.	
Group/BU	Contains the employee's group or bargaining unit code.	
Project Account	Contains the project account associated with the employee action. This box is available if your organization uses Munis Project Accounting.	
Org Object Project	Provide the org, object, and project codes for the general ledger account number associated with the employee in Employee Master.	
Evaluations		
Evaluation Score	Identifies the evaluation score associated with a salary change. When you click Output-Post, this score completes the Evaluation Score box in Actions History Reporting and Actions Inquiry.	
Pay Off		
Amount	Specifies the payoff amount.	
Type	Indicates the payoff type.	
Leave		
Leave Length	Amount of leave time the employee is taking. You can change a default value.	
Estimated Return	Contains the estimated date the employee is returning from leave. This value is required when the value of the Action Code list indicates a leave-related action.	
Seniority Impact	If selected, indicates that the leave affects seniority; clear if there is no impact.	

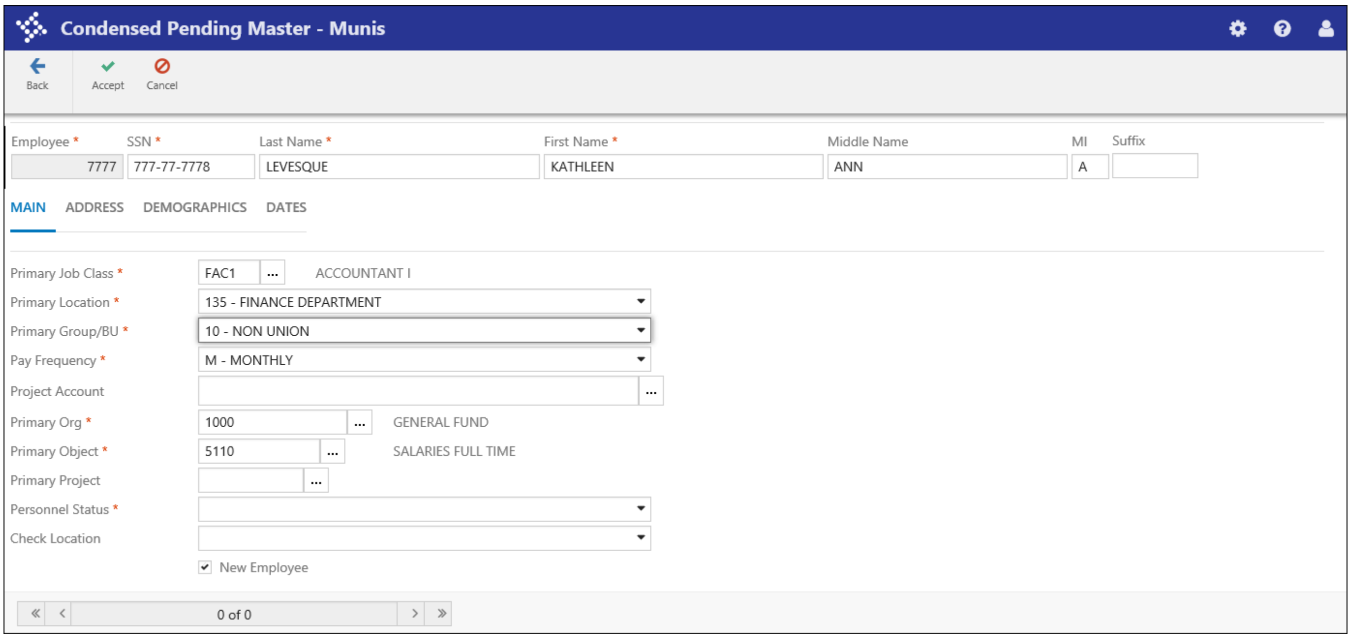
4. Click Accept to continue to the next step.
5. Click Output-Post to post the records.

When the ESS User Name Format and Sync Mode and ESS User ID Format settings are defined in the Payroll Control Settings program, the Personnel Actions Entry program automatically creates a new user account in ESS-User Administration for new hire or reinstatement actions. In addition, the Active Status field in Actions Codes must be set to Active for new hire or reinstatement actions for the automated user account process to complete.

Pending Employee Master File

When you are adding a new employee record in the Personnel Actions Entry program and you click Accept, the program opens the Pending Employee Master file program.

If you are completing the New Hire process for an applicant that has been processed using Munis Recruiting, many of the values are automatically created from information contained within the applicant record. In this case, review this information for accuracy and currency. Any data values that need to be changed should be changed directly on this screen.



To update pending employee details:

1. Complete the fields, using the following table as a guide. Press the Tab key to move forward through each field.
2. When all the fields are complete, click Accept.
   The program displays “Record(s) updated” in the status bar to indicate that these changes have been made to the database.

To cancel the entry and start over, click Cancel to discard all changes.

Field	Description	Notes
Employee	Contains the unique employee number for the new hire. Click +1 to select the next available number. (You must have View SSNs permissions to use this feature.) When you add a new employee number, the Pending Employee Master program opens for entry of required information.	
SSN	Contains the employee’s Social Security number.	
Last Name First Name	Contain the employee’s last name, first name, middle name, and middle initial.	

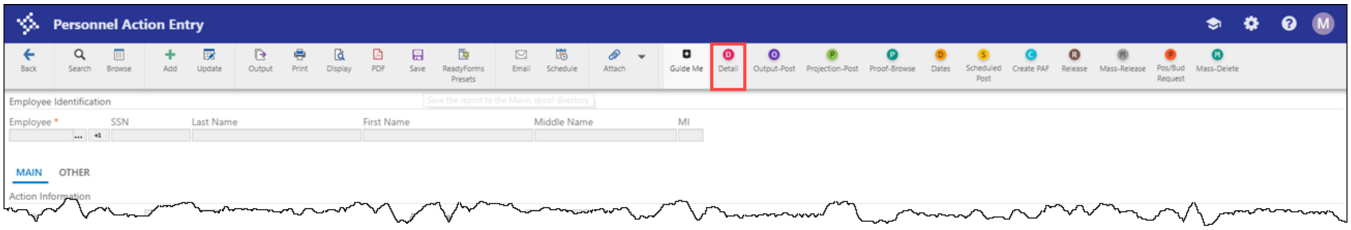
Field	Description	Notes
Middle Name MI Suffix		
Main Tab		
Primary Job Class	Identifies the employee's primary job with your organization.	
Primary Location	Identifies the employee's primary location.	
Primary Group/BU	Identifies the employee's group or bargaining unit.	
Pay Frequency	Specifies the pay frequency cycle for the employee (for example, weekly, monthly, and so on).	
Project Account	If your organization uses project accounting, enter the project account to which wages will be charged.	
Primary Org Primary Object Primary Project	Provide the org, object, and project does for the primary general ledger account to which the employee's salary is associated.	
Personnel Status	Specifies the employee's employment status (for example, full-time, part-time, nights, and so on).	
Check Location	Identifies the employee's primary work location (that is, the location to which paychecks are distributed).	
New Employee	If selected, indicates the record is a new employee record.	
Address Tab *If your organization uses Recruiting, the program completes these fields automatically, but they should be reviewed for accuracy. The address contained on this screen should reflect the employee's current home address as it will be included on pay checks and tax forms.*		
Address City State Country County	Contain the employee's full address.	
Email Address	Employee's email address. If the employee elects to receive electronic communications and forms, this must be completed.	
Supervisor	Provides the employee ID of the employee's supervisor.	
Phone Information		
	Specifies the primary phone number, identifies phone types (home, cell, and so on), indicates an unlisted status for numbers that are not published, and assigns the text opt-in feature, acknowledging that the selected phone number accepts text	

Field	Description	Notes
	messages and the applicant or employee has accepted text messaging as a communication method. Telephone number types are created and maintained in the Payroll Miscellaneous Codes program for the code type PHON–Telephone Number Type. Click the folder button in the column heading row to open the Miscellaneous Codes program.	
Demographics Tab *The information in these fields is not required, but it is a vital part of the EEO-4 reporting and provides other important statistical information for the organization. It is import to include complete and accurate data in these fields.*		
Gender	Employee's gender code. Gender codes (GEND) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes.	
Actual Marital Status	Employee's marital status. Options are H-Head of Household, M-Married, S-Single, and W-Widowed.	
Ethnic Code	Employee's EEO ethnic code. EEO ethnic codes (RACE) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes.	
Unemployment Tax	If selected, this check box directs that unemployment tax is paid for this employee.	
EEO Information		
Part/Full-Time	Employee's EEO job classification: P-Part-time, F-Full-time, and T-Temporary.	
Function	Provides the EEO function, which is used in the EEO-5 Report. You can enter any job function or you can select a function from the Job Class Table that can be accessed using the help button.	
EEO Exempt	If selected, indicates that the employee is exempt from EEO reporting.	
Ethnicity		
	Indicates if the employee is of Hispanic or Latino ethnicity.	
Race		
	Indicate the employee's ethnic background. You can select more than one check box.	
Dates Tab		
Birth Date	Specifies the employee's date of birth.	
Hire Date	Identifies the employee's date of hire.	
Service Date	Identifies the initial employee's service date.	

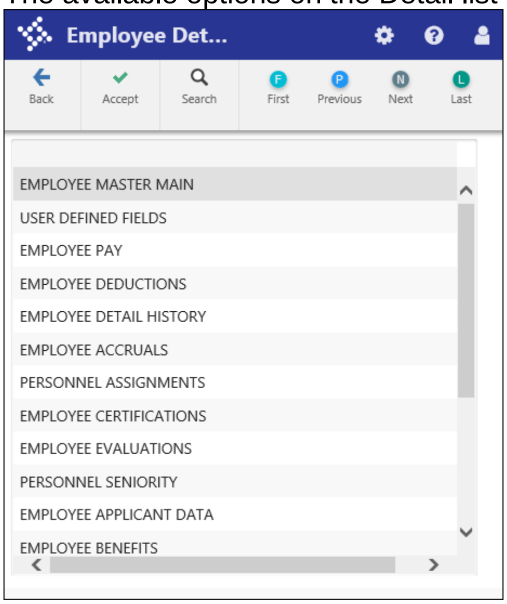
Field	Description	Notes
	This determines the employee's seniority, longevity, or benefit accrual. Initially, this is the same as the Hired date. For breaks in service, change this date accordingly.	
Permanent Date	Specifies the date the employee became permanent.	
Retirement/Pension Date	Contains the adjusted hire date to indicate pension years served.	
Include in Payroll After	Specifies the date after which the employee should be included in the payroll generate. The system compares the Payroll Start Date in the Payroll Control Settings program to this date to determine if the employee will be included in the current payroll. The Include After date must be prior to the payroll date. This date permits records for future/new employees to be created prior to their hire date without being included in payrolls prior to their start date. (Personnel Actions also permits this without affecting this date.) When an employee is issued an advance check during Payroll Processing, this date is updated with the date entered in that program so that the employee will not be included in the payrolls for which he/she received an advance. You can use this date to indicate that pay for this employee is to be stopped until the date entered.	

Detail

To add employee detail records (for example, deductions, pay, and so on), use the Detail option in the Personnel Action Entry program.



The available options on the Detail list vary according to your assigned role and permissions.



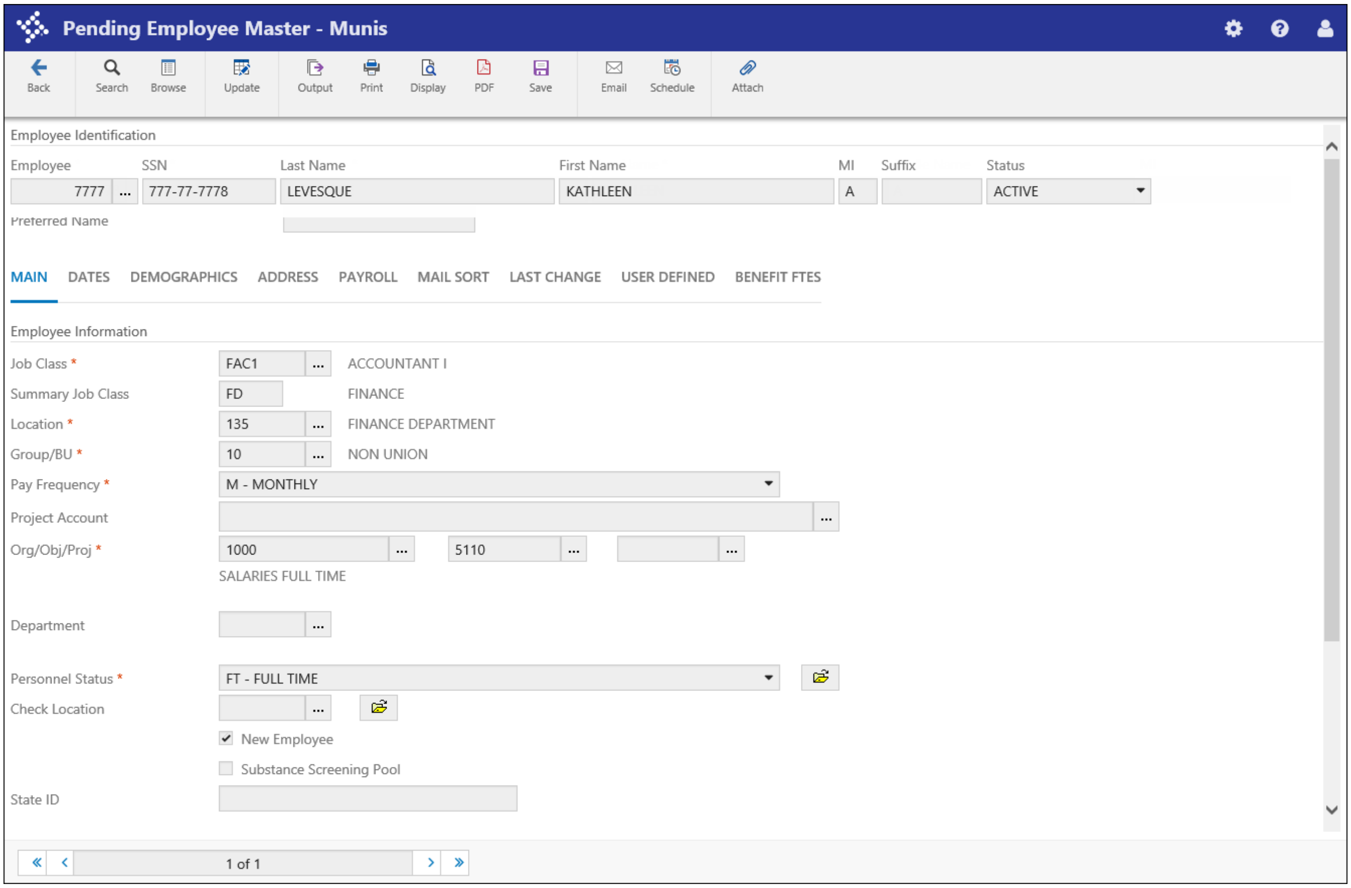
Pending Employee Master

The Pending Employee Master program does not provide fields for all information that may be stored for an employee. Additional fields are available in the Employee Master program. If that information is available during the data entry process, use the Employee Master program to enter the data. The additional information may include the following:

- Additional dates
- Additional phone numbers
- Emergency contact information
- Additional addresses
- Highest education level

To update and save the Employee Master record:

1. Select Employee Master Main from the Detail menu.
   The program displays the Pending Employee Master screen.

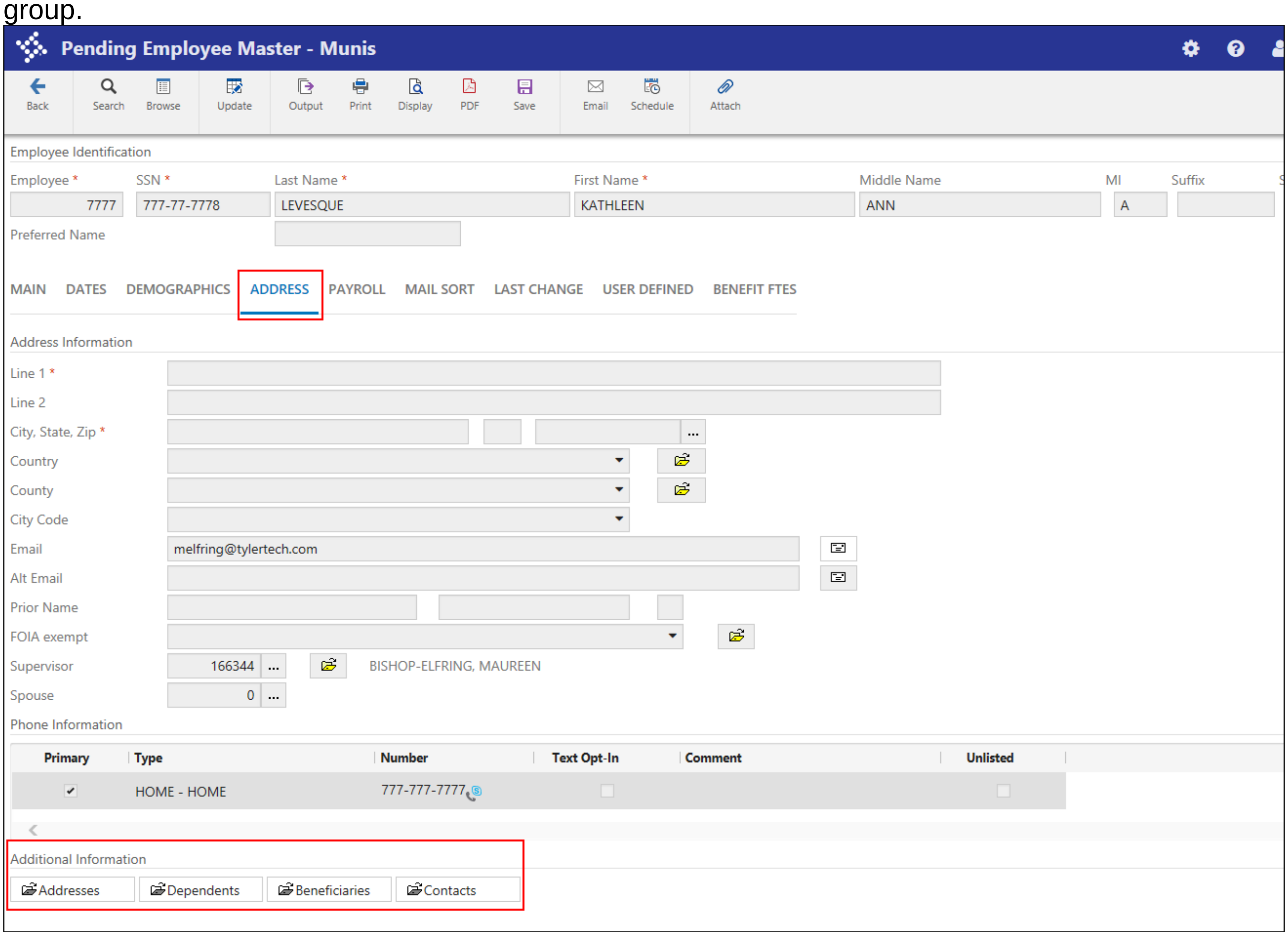


2. Click Update and modify the fields, as required, and then click Accept. (If no updates are required, click Update and then Accept to save the record as is.)

Address Changes or Additional Information

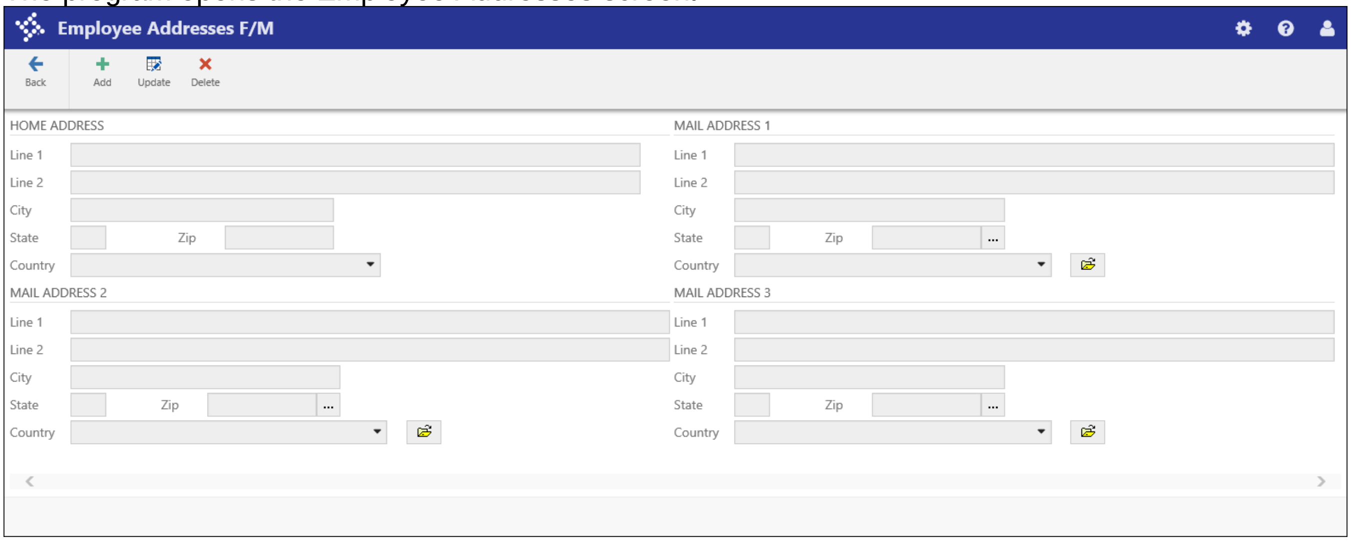
In addition to address details, the Address tab provides access to employee beneficiary, emergency content, and dependent information. If information exists for any of these data records, the folder button is highlighted.

To add additional phone information, click Update in the toolbar and navigate to the Phone Information group.

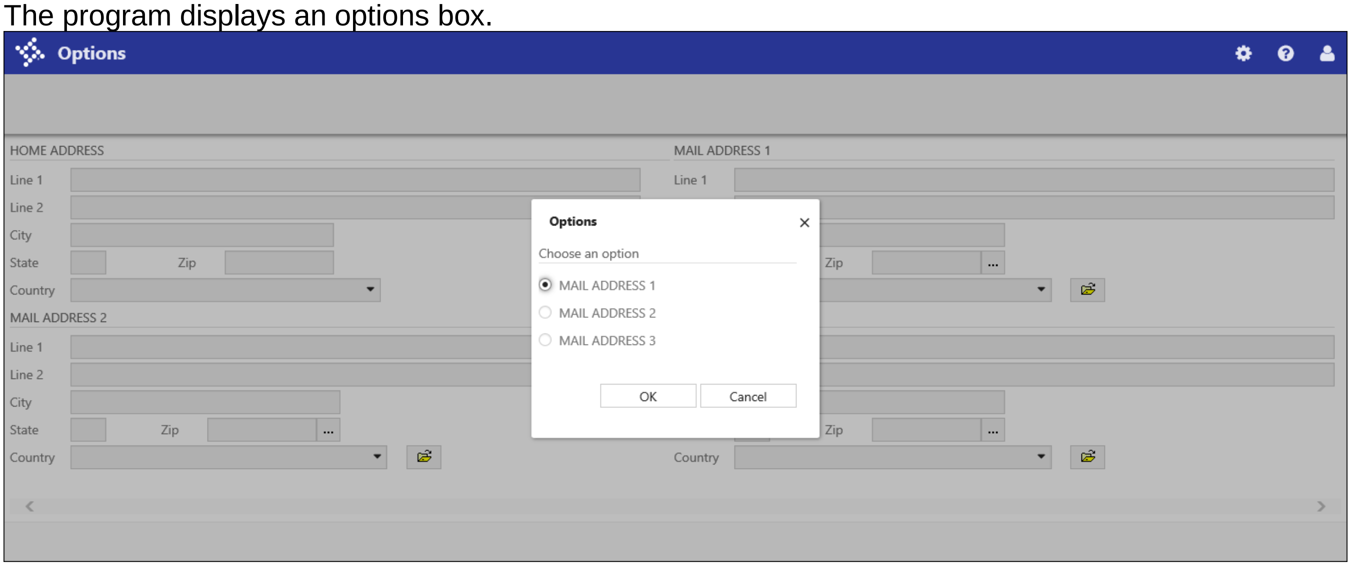


To add an additional address:

1. Click Addresses.
   The program opens the Employee Addresses screen.



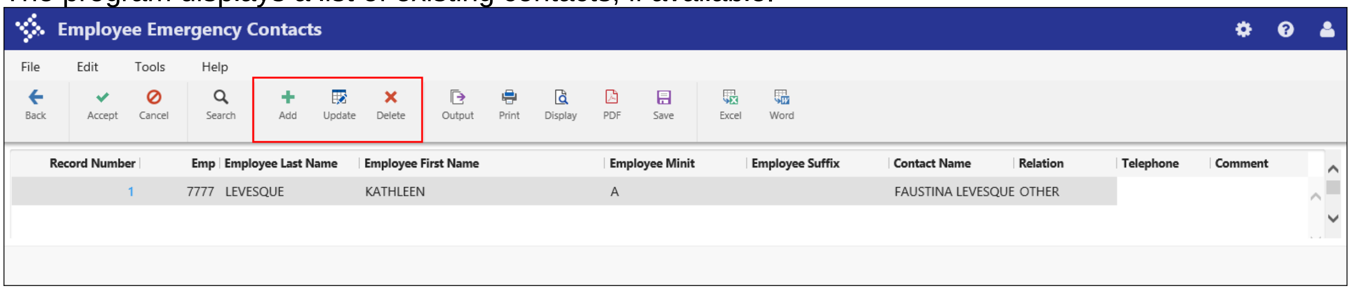
2. Click Update to change an existing address, or click Add to add a new address.
   The program displays an options box.



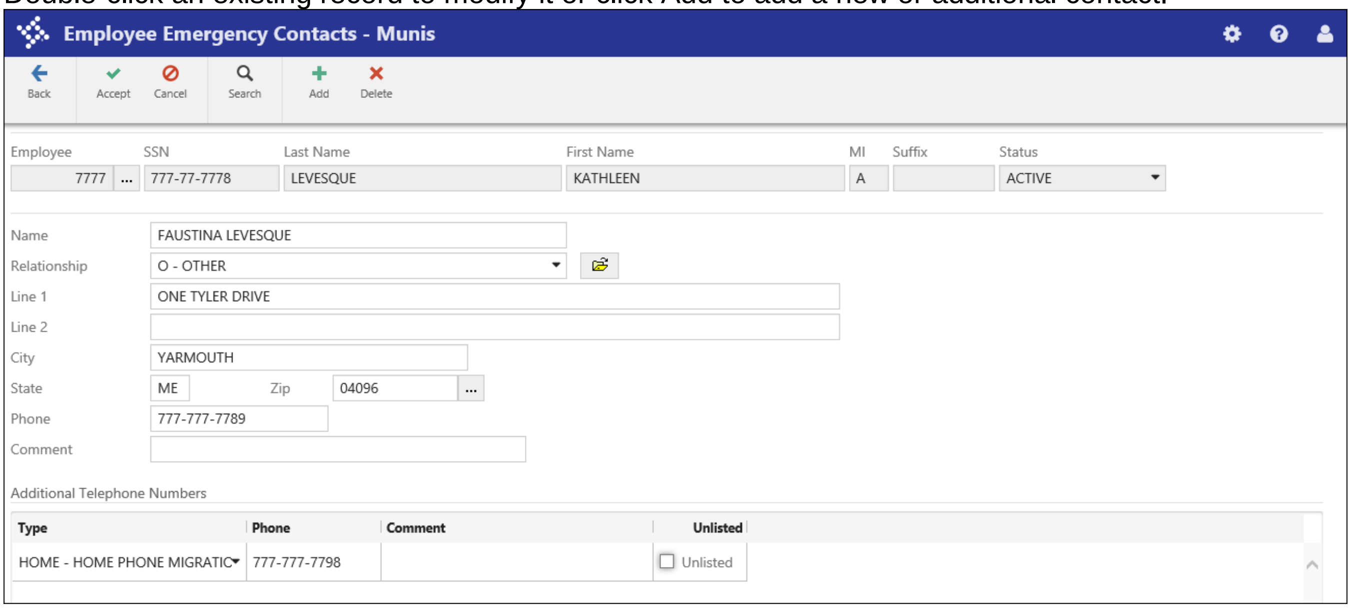
3. Select the option for the address to add or update.
4. Complete the fields, as required.
5. If this is an address outside of the United States, select the correct country from the list provided.
6. Click Accept to accept the changes.

To add emergency contact Information:

1. Click Contacts.
   The program displays a list of existing contacts, if available.



2. Double-click an existing record to modify it or click Add to add a new or additional contact.



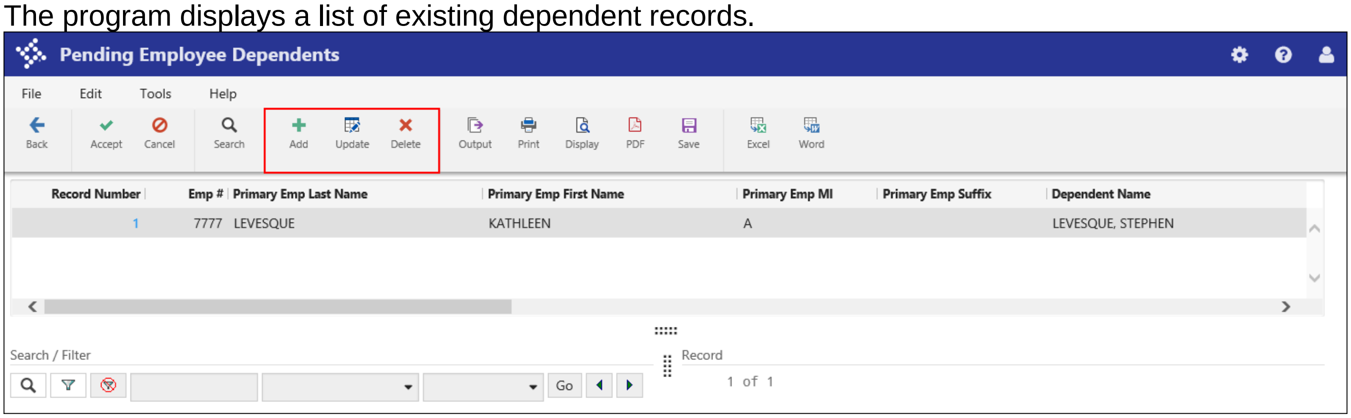
3. Complete the fields, as required, using the following table as a guide, and then click Accept to save the record.

Field	Description	Notes
Name	Contains an emergency contact name for the employee. The name can contain up to 30 characters.	
Relationship	Identifies the relationship of the contact to the employee. Relationship codes are maintained in the Payroll Miscellaneous Codes program for the code type RELN—Relationship Codes. Click the folder button to open Miscellaneous Codes, where you can maintain codes.	
Line 1 Line 2	Specify the first and second line of the emergency contact's address.	
City	Holds the city of the emergency contact's address.	
State	Contains the state of the emergency contact's address.	
Zip	Indicates the ZIP code of the emergency	

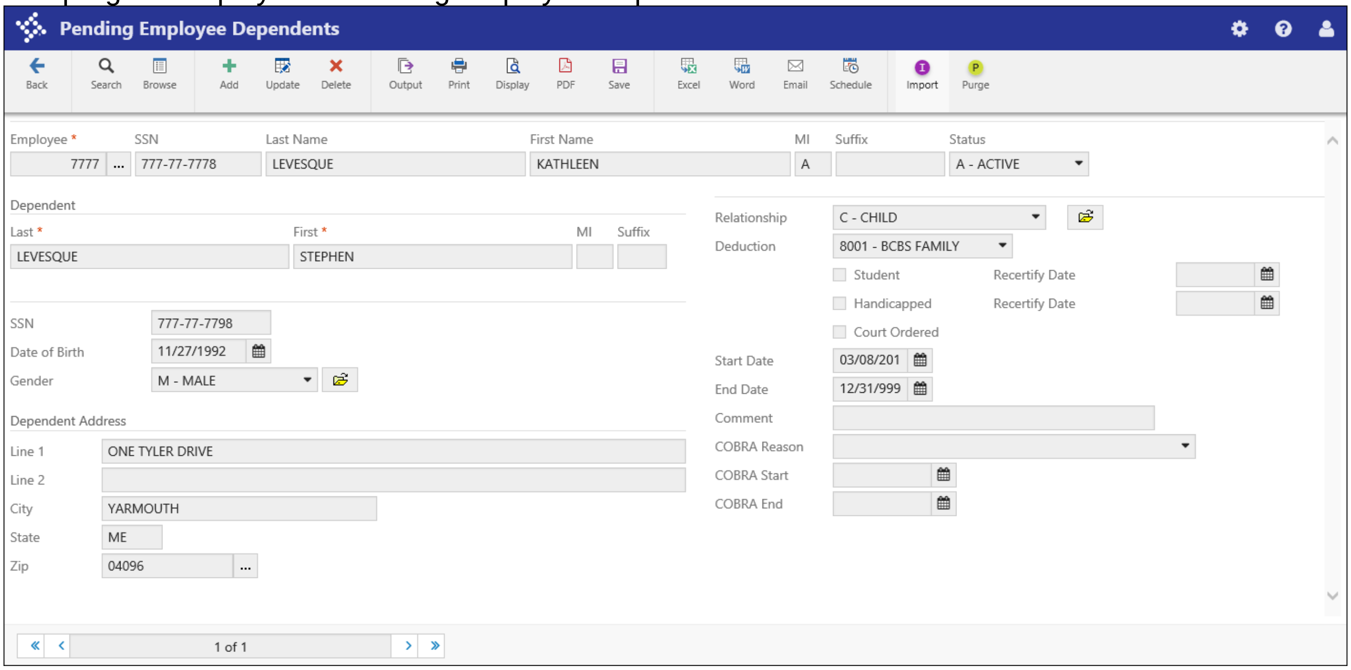
Field	Description	Notes
	contact's address.	
Phone	Contains the emergency contact's telephone number.	
Comment	Contains any comments applicable to the emergency contact. You can enter up to 30 characters of text.	
Additional Telephone Numbers *These fields hold any secondary telephone numbers for the emergency contact.*		
Type	Specifies the type of phone number, for instance office, home, or cell. The available options are drawn from code type PHON— Telephone Number type in the Payroll Miscellaneous Codes program.	
Phone	Contains the emergency contact's additional telephone number.	
Comment	Holds any comments applicable to the emergency contac's additional telephone number.	
Unlisted	If checked, indicates that the number is unlisted.	

To add dependent records:

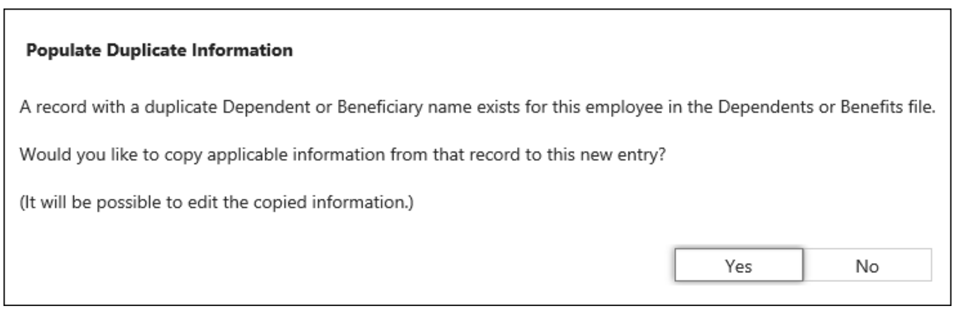
1. Click Dependents.
   The program displays a list of existing dependent records.



2. Double-click an existing record to modify it or click Add to add a new or additional contact. The program displays the Pending Employee Dependents screen.



3. When you complete the Name fields in the Dependent group, if that name matches a name in the Beneficiaries record, the program displays the Populate Duplicate Information message.



4. Select Yes to complete the screen details using the duplicate information.
5. Complete the fields, as required, using the following table as a guide, and then click Accept to save the record. If you are adding a dependent for whom a beneficiary record exists, the program displays a Copy message, allowing you to copy the details from the existing record.

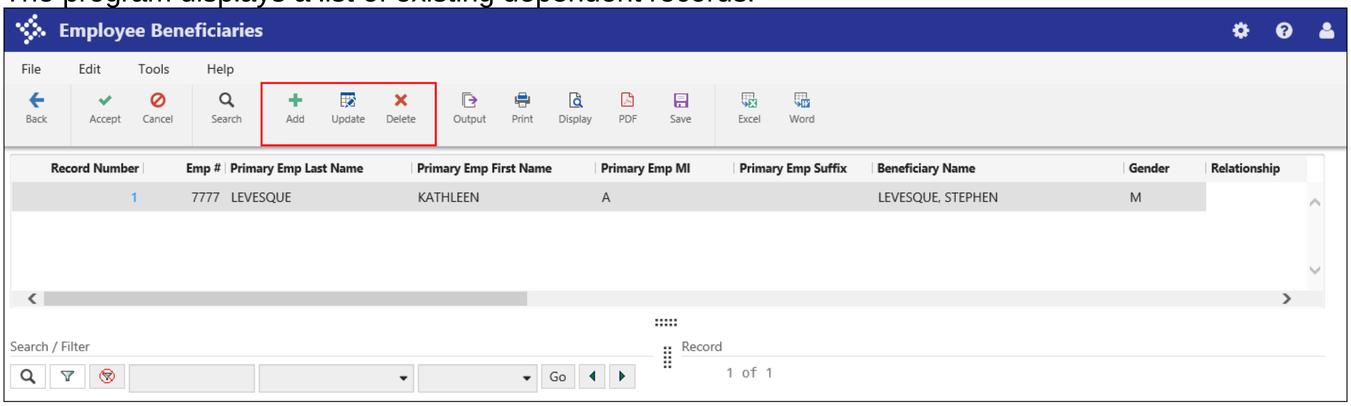
Field	Description	Notes
Employee	Contains the employee number. The employee number must exist in the Employee Master program. When you complete this box and press Tab, the program completes the SSN and Name boxes.	
SSN	Contains the employee Social Security number. When you complete this box and press Tab, the program completes the Employee and Name boxes.	

Field	Description	Notes
Last Name First Name MI Suffix	Ccontain the employee's full name and suffix, as appropriate. If you complete the Employee or SSN box and press Tab, the program completes these fields.	
Status	Indicates the employee's current status.	
Dependent		
Last First MI Suffix	Contain the full name and suffix (if applicable) of the employee's dependent.	
SSN	Contains the Social Security number of the employee's dependent.	
Date of Birth	Contains the employee's dependent's date of birth.	
Gender	Indicates the gender of the employee's dependent. Gender codes are maintained in the Payroll Miscellaneous Codes program for the code type GEND—Gender Codes. Click the folder button to open the Payroll Miscellaneous Codes program to maintain codes.	
Dependent Address		
Line 1 and 2	Contain the street and post office details of the dependent's address. Each line can contain up to 30 characters.	
City State Zip	Contain the dependent's city, state, and ZIP Code address details. The City box can contain up to 20 characters; the value of the State box must be the two-character postal code for the state; and the Zip box can contain the five-digit ZIP Code or the five-digit plus four code. If you use the nine-digit code, insert a hyphen (-) before the sections. **Tip:** In the Zip box, click the help button to choose a ZIP Code™ from a list; the program automatically completes the City, State and Zip boxes.	
Relationship	Indicates the dependent's relationship to the employee. Relationship codes are maintained in the Payroll Miscellaneous Codes program for the	

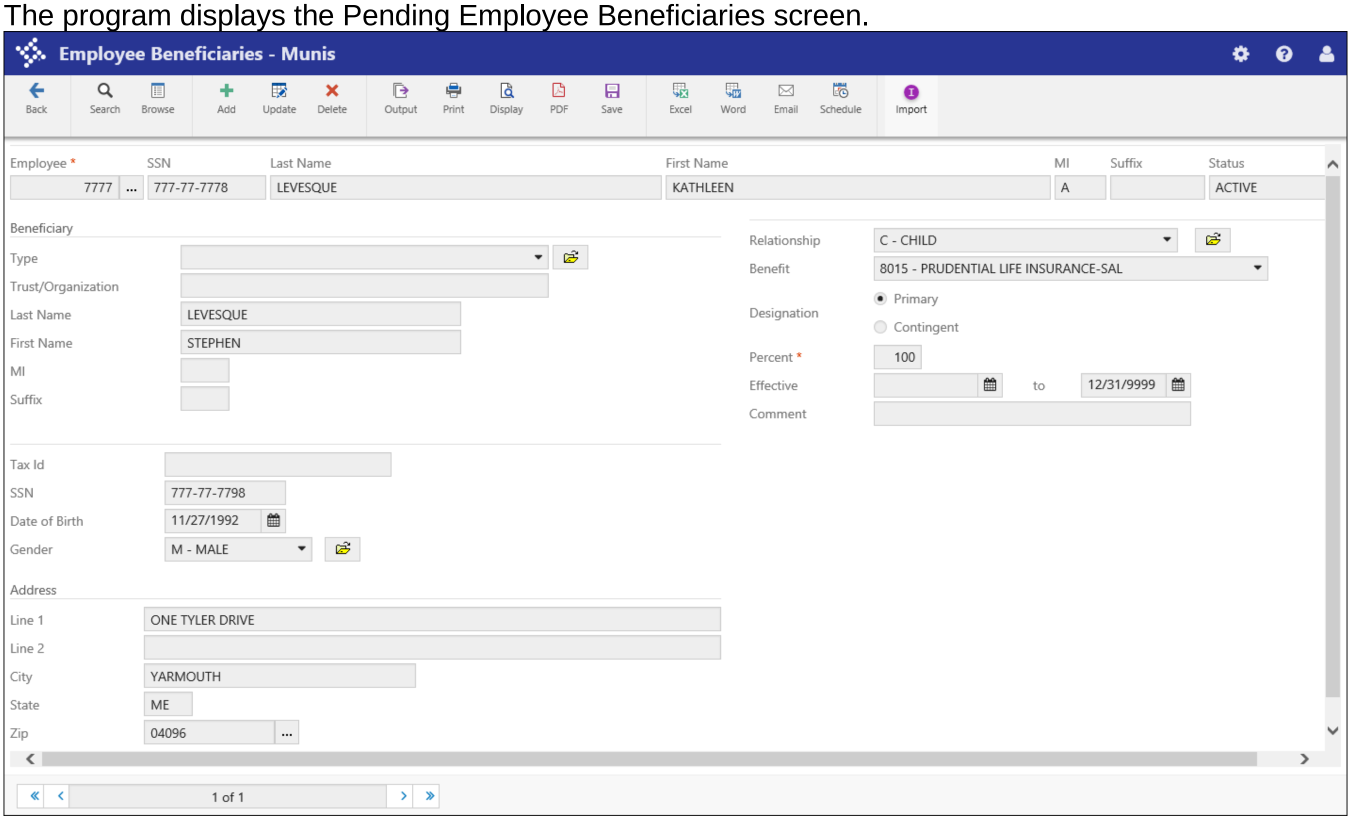
Field	Description	Notes
	code type RELN— Relationship Codes. Click the folder button to open the Miscellaneous Codes program to maintain codes.	
Deduction	Indicates the deduction linked to this dependent (for example, direct deposit, life insurance, and so on).	
Student	If selected, indicates that the dependent is a student. If you select this check box and complete the Birth Date box, the default value for the End Date box is 25 years after the birth date. For all other cases, the default value for the End Date is 12/31/9999.	
Recertify Date	Identifies the date on which the dependent's student status requires recertification.	
Handicapped	If selected, indicates that the dependent is a person with disabilities.	
Recertify Date	Identifies the date on which the dependent's handicapped status requires re-certification.	
Court Ordered	If selected, indicates that the identified dependent is a court-ordered dependent. If an employee accesses this record using Employee Self Service, he or she cannot change the value of this check box or delete the dependent record.	
Start Date	Contains the start date for dependency status.	
End Date	Contains the end date for dependency status. If the Student check box is selected, the default value for this date is 25 years after the date entered in the Birth Date box. For all other cases, the default value for the End Date is 12/31/9999.	
Comment	Contains any comments associated with this record. You can enter up to 30 characters in this box.	
COBRA Reason	Defines the reason for initiating COBRA.	
COBRA Start/End	Define the range of dates for the COBRA participation.	

To add beneficiary records:

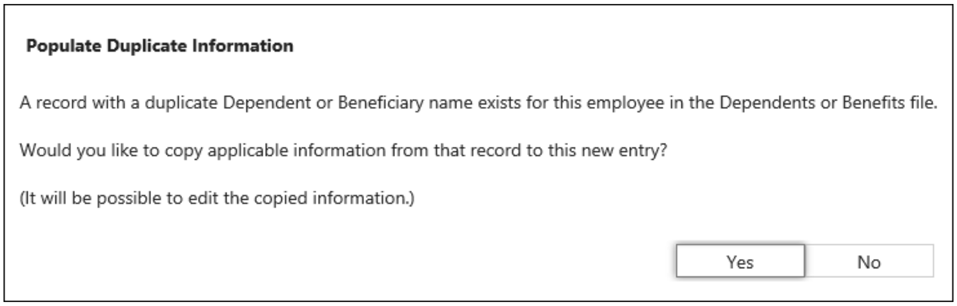
1. Click Beneficiaries.
   The program displays a list of existing dependent records.



2. Double-click an existing record to modify it or click Add to add a new or additional contact.
   The program displays the Pending Employee Beneficiaries screen.



3. When you complete the Name fields in the Beneficiary pane, if that name matches a name in the Dependents record, the program displays the Populate Duplicate Information message.



4. Select Yes to complete the screen details using the duplicate information.
5. Complete the fields, as required, using the following table as a guide, and then click Accept to save the record. If you are adding a beneficiary for whom a dependent record exists, the program displays a Copy message, allowing you to copy the details from the existing record.

Field	Description	Notes
Employee	Contains the employee number. The employee number must exist in the Employee Master program. When you complete this box and press Tab, the program completes the SSN and Name boxes.	
SSN	Contains the employee Social Security number. When you complete this box and press Tab, the program completes the Employee and Name boxes.	
Last Name First Name MI Suffix	Contain the employee's full name and suffix, as appropriate. If you complete the Employee or SSN box and press Tab, the program completes these fields.	
Status	Indicates the employee's current status.	
Beneficiary		
Type	Determines if the beneficiary is a person or an entity. If the beneficiary is defined as a person, the Tax ID and Trust/Organization fields are not accessible. If the beneficiary is defined as a non-person entity, then SSN, Gender, and Date of Birth fields are not accessible. Beneficiary type codes (BFCY) must exist in the Payroll Miscellaneous Codes program. Click the folder button to view/maintain codes.	
Trust/Organization	Contains the beneficiary's organization or trust, if the beneficiary type is defined as a non-person entity.	
Last Name	Contain the beneficiary's last name, first	

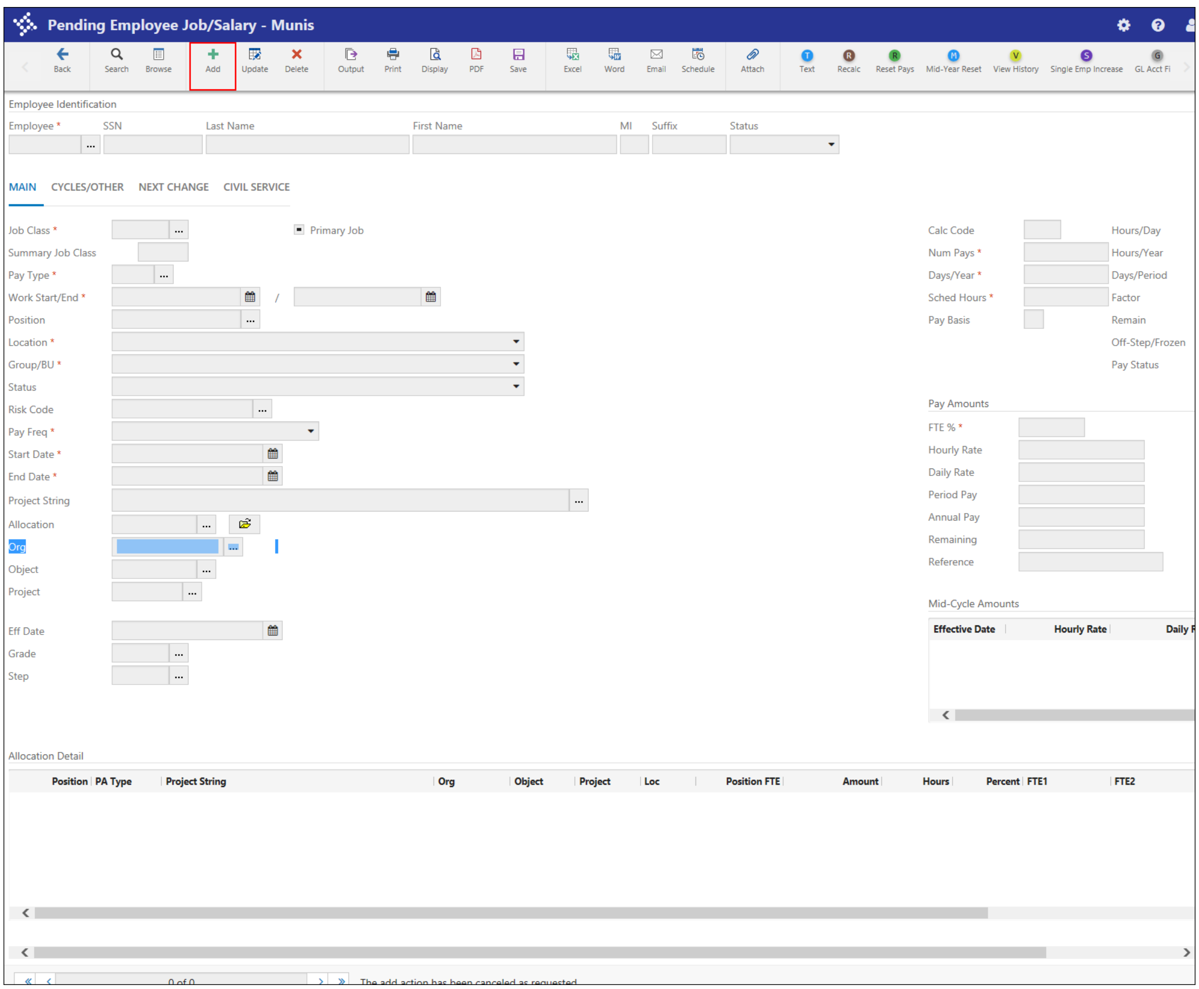
Field	Description	Notes
First Name MI Suffix	name, middle initial, and suffix (if applicable). You can enter up to 20 characters for the last name and up to 15 characters for the first name. If the beneficiary is a trust or organization, use these fields to identify a contact person.	
Tax ID	Contains the organization's tax identification number, if the beneficiary type is defined as a non-person entity.	
SSN	Contains the beneficiary's Social Security number.	
Date of Birth	Stores the beneficiary's date of birth.	
Gender	Indicates the beneficiary's gender. Gender codes (GEND) must exist in the Payroll Miscellaneous Codes program. Click the folder button to view or maintain codes.	
Address		
Line 1 and 2	Contain the street or post office box address for the beneficiary. You can enter up to 30 characters of text on each line.	
City	Contains the city where the beneficiary resides. You can enter up to 20 characters of text.	
State	Contains the two-character postal code for the state where the beneficiary resides.	
Zip	Contains the ZIP Code for the beneficiary's address. You can enter the standard five-digit code or the ZIP+4 code.	
Relationship	Identifies the relationship of the beneficiary to the employee. Relationship codes (RELN) must exist in the Payroll Miscellaneous Codes program. Click the folder button to view/maintain codes.	
Benefit	Identifies the salary deduction that is associated with this benefit (for example, life insurance or savings bonds).	
Designation	Identifies whether the beneficiary is the primary beneficiary or a contingent beneficiary.	
Percent	Indicates the percentage of the benefit amount applies to this beneficiary. This is	

Field	Description	Notes
	a required value.	
Effective	Identify the range of dates for which the beneficiary record is effective. You can leave the To date blank for benefits that do not have a defined end.	
Comment	Contains any comments applicable to the record.	

Employee Pay

To enter job/salary records for an employee:

1. Select Employee Pay option from the Detail menu.
   The program displays the Pending Employee Job/Salary program.
2. Click Add to complete the fields with the pending employee details.



3. Press Tab to move through the remaining fields, updating them as required.
   The program completes many of the fields according to the job class and pay types entered.
4. When the fields are complete, click Accept to save the record.

Field	Description	Notes
Employee	Contains the employee number. The number must exist in the Employee Master program. When you are adding a bond record and you complete this box, press Tab and the program completes the remaining employee detail fields from the employee master record. When you click Search and complete this box, press Enter and the program completes the remaining employee detail fields from the employee master record.	
SSN	Contains the Social Security number for the employee for which you are entering history. When you click Search and complete this box, press Enter and the program completes the Employee and Names boxes.	
Last Name First Name MI	Contain the employee's last name, first name, and middle initial. The program completes these boxes when you enter a Social Security or employee number during the Search or Add process.	
Suffix	Any suffix (for example, Jr. or II) that is part of the employee name.	
Status	Identifies the employee's current employment status.	
Main Tab		
Job Class	Employee's job class code. For an employee with multiple job classes, you need to create a record for each. When you add a new job class for an employee, the information from the Job Class Master program completes this value, but you can change it. Notes: For base pay types only, a change confirmation screen opens when you make changes that no longer match the Position Control record. Click the folder button to override the Sub Table for the active job class; this is applicable for substitutes who require rates other than the default value. When you click the folder button, the program displays the Assign Substitute Pay screen, where you can assign a different substitute table.	
Summary Job Class	Provides the summary job class code, if applicable. Summary class codes are assigned to job class codes in Job Class Master.	
Position	Employee's position code. The program updates position controls if the Update Position Control check box is selected in Personnel Settings. Notes:	

Field	Description	Notes
	When you add or update a record, the Max # Employees box in Position Control is checked against the number of employees that already have this position. If your organization is up to the maximum number, the program displays a warning message. If a substance testing pool is defined for a position in Position Control, when you add a base pay type, the employee is automatically assigned to the pool. If training requirements are defined for a position in Position Control, when you assign an employee to that position, Employee Training is checked to see if the employee has a record matching the defined requirements. If not, a warning message appears. When you change the value of this box, the program updates the value of related fields with values from the Personnel Position Control program.	
Pay Type	Earnings pay type code. Employees have a base pay type and may have other pay records contributing to their salary. The base pay type is created automatically when you enter the employee under a new job; additional compensation pay types are added manually. Notes: If you attempt to add more than one base pay type code per job class for an employee, you are warned that adding another base pay record is not recommended. You can, however, continue. If you update a pay, the program creates an audit record.	
Work Start/End	Define the work range for the employee for the defined job class and pay type. These fields are only accessible on base pay records and must be completed when you use position control. The program uses these dates when calculating whether there is enough FTE available within the specified position. Base pays for other employees with a work start/end date range that overlaps (that is, starts prior to entered end date or ends prior to entered start date) is counted as FTE unavailable. Other employee's base pays that do not overlap will not be counted as taken/filled and are seen as available by the program.	
Position Start/End	Define the date range during which the the employee is working at the position.	
Location	Identifies the employee's primary location from Employee Master. Note: For base pay types only, a change confirmation screen opens when you make changes that no longer match the Position Control record.	
Group/BU	Indicates the group or bargaining unit to which to employee is assigned. This is completed from Employee Master.	

Field	Description	Notes
	Note: For base pay types only, a change confirmation screen opens when you make changes that no longer match the Position Control record.	
Status	Identifies the employee's current employment status.	
Risk Code	Associated with position. You can change the default value. If you override the code, you can reset it by selecting the blank option. The default risk code from Job Class Code, if any, will then be used the next time.	
Pay Freq	Indicates the employee's pay frequency from Job Class Master or Salary Tables.	
Start/End Date	Contain the employee's start and end dates. The default value for the start date is the current date; the default value for the end date is 12/31/9999. The payroll generation process uses these dates to determine if pay should be generated. The pay is included in the payroll generate if the start and end dates on the pay record fall within the start and end dates of the payroll warrant. For an ongoing pay type, leave the default date ranges. For a lump sum additional compensation pay record, such as coaching pay, enter the specific date it is paid (the start and end date would be the same).	
Project String	Identifies the project string associated with the pay. The program displays the description when you enter a value. This box is only accessible if your organization uses Munis Project Accounting.	
Allocation	Contains the employee's allocation code, if this position is split to multiple general ledger accounts on a percentage basis. Click the folder button to open Payroll Allocations, where you can view/maintain the codes. Notes: Updating the code affects all pay records using that allocation code. For base pay types only, a change confirmation screen opens when you make changes that no longer match the Position Control record.	
Org Object Project	Identify the general ledger expense account to which all employee earnings for the corresponding pay type is charged. The program completes the account from the Employee Master program. The object code comes from the Pay Master program. For base pay types only, a change confirmation screen opens when you make changes that no longer match the Position Control record. The program completes the default value for partial general ledger accounts with the account information defined in the employee's master record.	
Eff Date	Effective date for the employee's salary level. The current date is the default value, but you can change it.	

Field	Description	Notes
	The Mass Contract program uses the effective date as the date an increase is applied. If mid-cycle raise functionality is active, the program prorates an increase according to the value of the effective date, and the payroll begin and end dates. Note: If salary tables are in use, this date is used to retrieve the proper grade/step record. It also notes when the salary level was last changed (for example, their last step or merit raise).	
Grade	Contains the minimum grade when the employee's salary comes from Salary Tables.	
Step	The employee's step within the grade. Note: The help options that display are not specific to the job class on the job/pay record. This means that all steps for that grade/step combination display for this field. If you choose a step outside the job class restriction, you are given a warning.	
Calc Code	Identifies the salary calculation code. This comes from one of the following programs: Job Class Master, Salary Tables, or Pay Master.	
Num Pays	Employee's number of pay periods.	
Days/Year	Employee's number of work days per year. When you add a new pay record with a calc code 33 and there is a calendar associated with the job class or the position, the program updates the value of this box based upon the remaining days of the calendar for the current fiscal year according to the defined start date.	
Sched Hours	Employee's number of scheduled hours per pay period.	
Pay Basis	Specifies pay basis/scale for this employee pay type.	
Compa-ratio	Provides the compa-ratio for the salary. This field is available when the Display Compa-ratio field in Payroll Control Settings is set to Y-Yes. The Compa Ratio field is a searchable field and is included in Excel exports created from Employee Job/Salary or Employee Inquiry.	
Pay Amounts *For Calc Code 73-Advanced Stipends, these values are display only and are calculated dynamically according to the employee's base salary and any active stipend codes that have start and end dates outside of the current date.*		
FTE%	Contains the employee's full-time equivalent (FTE) percentage.	
Hourly Rate	Contains the employee's hourly pay rate.	
Daily Rate	Contains the employee's daily pay rate.	
Period Pay	Contains the employee's pay for a period.	
Annual Pay	Employee's annual salary.	
Remaining	Employee's remaining salary.	
Reference	Reference salary for the employee.	

Field	Description	Notes
Hours/Day	Number of hours per day for this employee pay type.	
Hours/Year	Indicates the employee's scheduled number of hours per year. When you add a record, the default value is blank. Once you enter a number, the program retains it until you update it. This box accepts values from 0.00 to 9999.99.	
Days/Period	Contains the employee's days per period.	
Factor	Identifies the pay factor for this pay type. This is used for overtime pay types to instruct the system to use a factor (for example, 1.5 times the base pay rate) for the overtime rate. This is useful because overtime pay can be linked to the base pay rate; when the base rate changes, overtime is automatically updated. The factor can also be used with advanced stipends (calc code 73); in this case, this box displays the calculated stipend factor. If the calculated stipend factor is greater than the factor defined in Pay Master, the value from Pay Master is used.	
Remain	Employee's number of remaining pay periods for the fiscal year. You can enter values with up to three digits to the right of the decimal point (for example, 0.000).	
Pay Status	Indicates the pay status for this pay type record. Options are A-Active, I-Inactive, L-On Leave, and M-Moving Out.	
Off-Step/Frozen	Identifies off-step or frozen pay attributes, if applicable.	
Mid-Cycle Amounts *This group displays when the Mid-Cycle Raises setting is enabled in the Payroll Control Settings program. These values are updated whenever employee pay rates are modified; to manually update these fields, select the Mid-Cycle Amounts option on the toolbar.*		
Effective Date Hourly Rate Daily Rate Period Pay	Define the date of the mid-cycle increase, along with the previous hour, daily, or period rate for the employee's pay.	
Allocation Detail		

Field	Description	Notes
	Provide all the allocation details for the selected record. When the Apply Pay Type Overrides check box is selected in Payroll Allocations, the defined values for the Default Org and Default Object fields in Pay Master override the org and object codes on all general ledger accounts displayed in this table. The Allocation Detail displays the general ledger accounts with the general ledger account segments blended from the allocation code and the Pay Master record. The Payroll Control Settings program determines the default value for the pay type override, and identifies who has access to the Pay Type Override check box in the Payroll Allocations program.	
Cycles/Other Tab		
Pending Position	Employee's pending position code. If a position is flagged in Position Control as pending, the output from Position Control uses this position instead of the value in the Position box on the Main tab. If this field is not defined and the position is pending, the report displays Pending Vacant.	
Employee Type	Indicates the employee type, which is a general classification used primarily by schools. Employee type codes (EMPT) must exist in Miscellaneous Codes. You can change a default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain codes. This list is used for GA CPI Reporting only.	
Contract	Identifies the employee's contractual status. Contract description codes (CONT) must exist in Miscellaneous Codes. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Grade Level	Specific grade level the employee teaches. Grade level codes (GRAD) must exist in Miscellaneous Codes. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Months	Employee's number of months worked if not 12.	
Civil Service	Identifies the employee's civil service status.	
Subject Matter	Indicates the employee's subject matter code. Subject matter codes (SUBJ) must exist in Miscellaneous Codes. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Calendar	Identifies the employee's calendar from the Calendars program. This is necessary only on the base pay record. If the Add to Base check box is selected on this tab, the default value for this list is completed from the Personnel Position Control or Job Class Master programs. Notes:	

Field	Description	Notes
	• Entering a calendar on a job/salary record with calculation code 11, 32, 33, or 70 triggers the program to make a mid-year salary calculation. The program looks up the calendar to get the number of days remaining for the start date for the pay and compares that number to the annual days on the calendar. If the remaining days for the start date are less than the total annual days, a mid-year calculation is made. The daily rate is multiplied by the number of remaining days from the calendar to get a new annual salary. This is divided by the number of remaining pays to calculate the new period pay. The program displays a Use Mid-Year dialog box, which allows you to adjust pays, adjust check, promote, or cancel. Select Adjust Pay to recalculate pay rates based on the number of days remaining in the calendar; select Adjust Check to calculate pay rates based on the number of days remaining in the calendar and adjust the difference in pay from the first paycheck; select Promotion to adjust pay due to a job promotion, or select Cancel to omit calculations and use the day per year from the Employee Job/Salary record to calculate hourly, daily, and period amounts. If you select Promotion, the program displays the Employee Job/Salary Mid-Year Promote screen. • If you update the value of the Calendar list for a base-pay salary record, the program displays the Sync Calendar dialog box. Use this box to reset other salary records for the same user, with the same job class, and the same calendar as the base-pay record. • For the consecutive pay process for substitutes, you can select a calendar that takes precedence over any calendar defined in Job Class Master and the Substitute Pay programs.	
Work Schedule	Employee's work schedule from Master Work Schedule. This applies to base pay records only. Click the folder button to open the Master Work Schedule program to add or update work schedule details.	
Employee Group	Contains the employee group number, if applicable.	
Encumbered	Determines if this employee pay record is encumbered, and, if so, how. Options are Yes, No, and Pay Periods Only. If you select the Pay Periods Only method, the Employee Update payroll process updates only pay periods and the Update Remaining Salaries process does not update the remaining salary.	

Field	Description	Notes
OT Table	Indicates a specific overtime table code to include on the employee's record. Codes are created and maintained in Overtime Tables; click the folder button to open the Overtime Tables program.	
Split FLSA Start	Defines a start time for FLSA that begins at a specific time within the day. Enter time in the military format (for example, 1300 for 1 p.m.).	
Sub Table	Indicates the table for substitute employees. From this list, you can select only consecutive workday sub tables.	
Escrow	Indicates the employee specific escrow table.	
Escrow Balance	Displays the employee's current escrow balance associated with the current active pay. This is a display-only value. If you attempt to delete a pay with a remaining escrow balance, the program displays a warning message.	
Schedule	Assigned the selected schedule to the base pay record for the employee. If there is a default schedule assigned to the job class or position, the program completes this list with that value, but you can change it.	
Team	Assigns the entered team number to the base pay record for the employee. If there is a default team assigned to the job class or position, the program completes this box with that value, but you can change it.	
Ext. Employment	Provides the extended employment number, if applicable. If your organization does not use extended employment functionality, this field does not display.	
Balloon	If selected, indicates that this a balloon pay type for this employee.	
Base Pay	If selected, indicates that this is a base pay record. The default value comes from the pay type.	
Add to Base	If selected, indicates that this record should be added to the base pay. The default value comes from the calculation code for the pay type.	
Recur Pay	If selected, indicates that this is a recurring pay record is automatically created when you enter a record. Note: Changes made to recurring pay records do not affect Employee Job/Salary records; however, if you delete a recurring pay record, the Employee Job/Salary record is also deleted.	
Pay Cycles	Indicate the pay cycles in which the employee is eligible to receive the pay type. This indicates that pay is calculated for that pay cycle. The default pay cycles are selected from the pay type when adding an employee.	
Work Days	Indicate the days of the week that the employee works. These check box values are display only; they relate to the Employee Work Locations program, which you can open by clicking the Work Locations option.	
Next Change Tab		

Field	Description	Notes
Effective Date	Effective date of the employee's next increase.	
Grade	Minimum grade when the employee's salary comes from Salary Tables.	
Step	Employee's next position step.	
Number of Pays	Employee's next number of pay periods.	
Days/Year	Employee's next work days per year.	
Scheduled Hours	Employee's next scheduled hours.	
FTE%	Full-time equivalency (FTE) factor percentage. If two employees work part-time in one position, then each fulfills 50% (0.50) of the FTE.	
Hourly Rate	Employee's next hourly pay rate.	
Daily Rate	Employee's next daily pay rate.	
Period Pay	Employee's next period salary.	
Annual Pay	Employee's next annual salary.	
Civil Service Tab		
Civil Service	Indicates the employee's civil service code from Job Class Master. Civil service category codes (CIVI) must exist in Miscellaneous Codes. You can change the default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Retirement Num	Contains the employee's retirement number.	
Classification	Identifies the employee's civil service classification. Civil service classification codes (CIVC) must exist in Miscellaneous Codes. You can change a default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Status	Identifies the employee's civil service classification status. Civil service classification status codes (CVCS) must exist in Miscellaneous Codes. You can change a default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Start Date	Contains the start date for the classification/status combination.	
Scheduled Hours	Indicates the employee's scheduled number of hours per pay period. When you add a record, the default value is blank. Once you enter a number, the program retains it until you update it.	
Probation End	Contains the probation end date for the classification/status combination, if applicable.	
Hours/Day	Indicates the employee's scheduled number of hours per day. When you add a record, the default value is blank. Once you enter a number, the program retains it until you update it.	
Expiration Date	Contains the expiration date for the classification/status combination.	

Field	Description	Notes
Hours/Year	Indicates the employee's scheduled number of hours per year. When you add a record, the default value is blank. Once you enter a number, the program retains it until you update it.	
Retention Date	Contains the retention date for the classification/status combination.	
Designation	Indicates the civil service designation. Civil service designation codes (CIVD) must exist in Miscellaneous Codes. You can change a default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Status	Identifies the civil service designation status. Civil service designation status codes (CVDS) must exist in Miscellaneous Codes. You can change a default value. Click the folder button to open Miscellaneous Codes, where you can view/maintain the codes.	
Comments	Contains any related comments. You can enter up to 50 characters of text.	

Position Overfill

When you enter a position number in the Employee Job/Salary program, the program may display an FTE waring. If this warning displays, make sure that you have selected the correct position number and current position status. Without closing the Employee Job/Salary program, open the Position Inquiry screen and review the position details. There should be a pending termination or transfer action indicating that the position should soon become vacant. If you are unsure, verify with the appropriate personnel that the correct position is being assigned to this employee.

Tax Status

When you initially enter a base bay record for a new employee, the program displays the FIT and SIT Settings box. Complete this box with the employee's federal income tax (FIT) and state income tax (SIT) details.

Additional Pay Type Codes

In addition to a base pay type, you can assign additional pay type codes to employees. Additional pay types can include overtime, vacation, bereavement, sick pays, and so on.

To add additional pay codes:

1. Find the employee record in the Employee Job/Salary program.
2. Click Add.
3. Press Tab to move to the Pay Type box.
4. Click the field help button for a list of available pay types.

Pay codes that are standard for any employee based on their job class assignment are automatically added by Munis when you create the employee records. Additional pay type codes may be added based on unique circumstances.

Pay Type Codes

Code Range	Description	Used to…
200-299	Overtime, Extra Hours, Comp Time Earned	If this employee is authorized for additional codes (grant-funded additional hours, and so on) that are not standard based on the job class.
300-399	Accrual/Leave Pay Codes	If this employee is authorized for additional codes (for example, military leave) that are not standard based on the job class.
400-699	Additional Compensation	If this employee is authorized for additional pays for acting duty pay, additional shift differential, or other additional compensation.

5. Select the appropriate pay type.
6. Press Tab to move to the Start Date box and update the Start and End Dates, if required.
7. Press Tab to move to the Pay Amounts group and fields, as required. In most cases, the program completes these values automatically, according to the pay type entered.

Employee Deductions/Benefits

Employee Deduction/Benefits maintains information regarding any deduction from an employee's paycheck, including:

- Tax withholding
- Insurance premiums
- Retirement contributions
- Deferred compensation deductions
- Garnishments, child support, tax levy and any other court ordered wage attachments
- Optional deductions (supplemental insurance, credit union, union dues, and so on)
- Direct deposits

Additional codes may also be added to process additional employer-paid benefits.

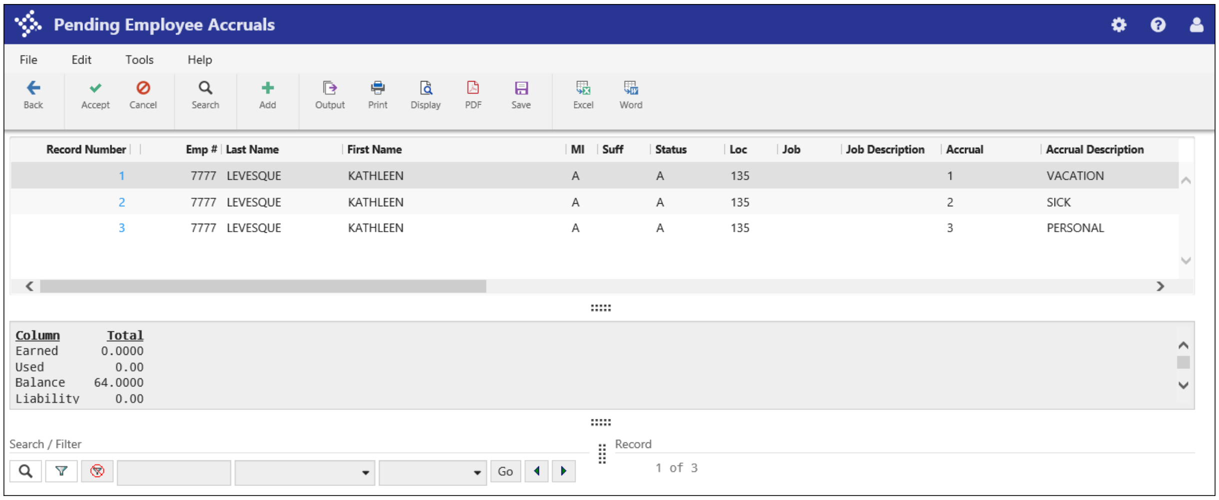
As the steps involved with maintaining each of these different deduction/benefit types are unique to each, refer to Munis Benefits Administration documentation for information on maintaining these records within the Personnel Action process or through Employee Self Service (ESS) online benefits enrollment.

Employee Accruals (Leave)

When you create employee records for a specific job class, the program automatically creates accrual records appropriate for that job. Typically, no changes are required to these records, but you should verify that the correct records and values are available.

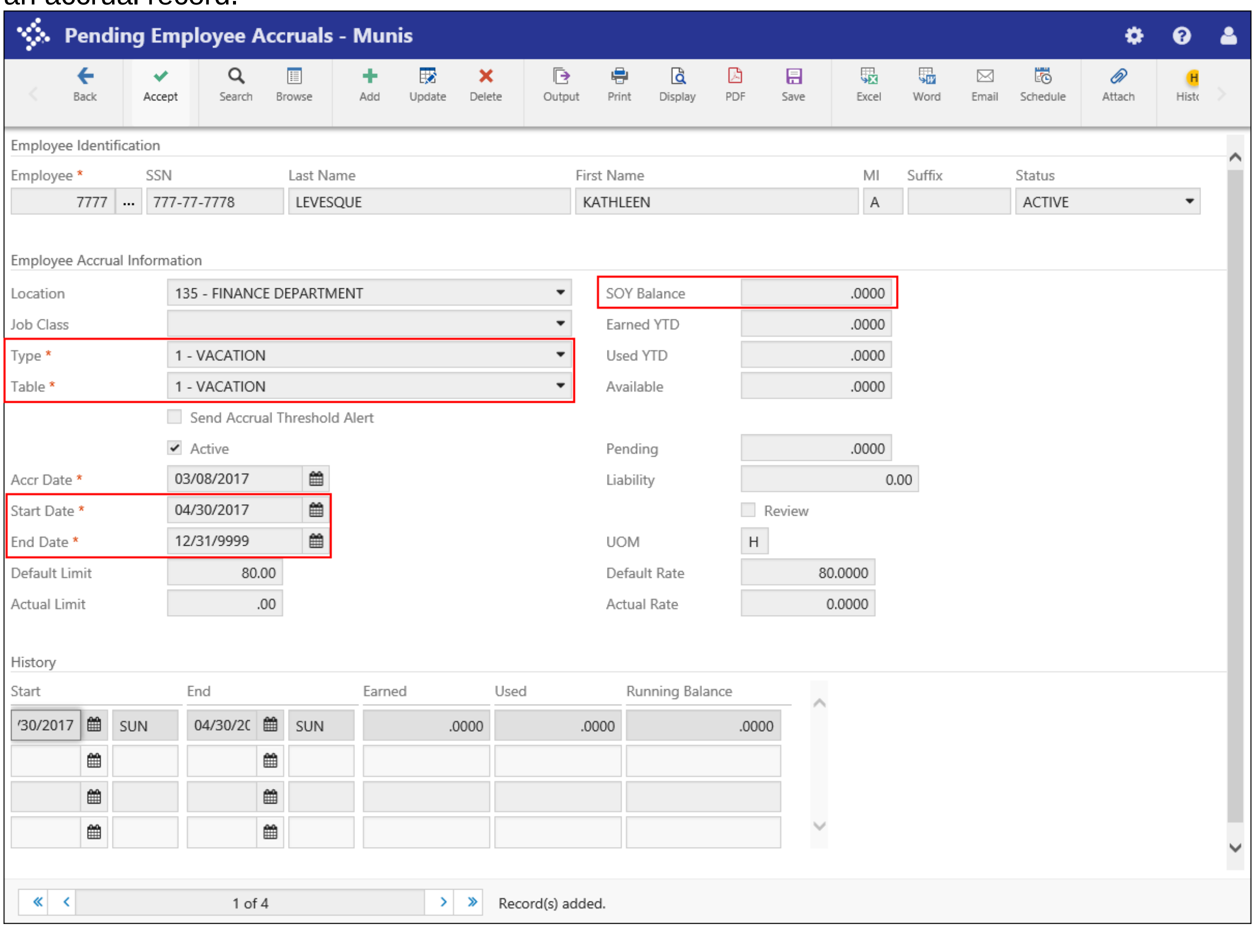
To add additional accrual records for an employee:

1. Select Employee Accruals from the Detail menu.
   If accruals exist for the employee, the program displays the Pending Employee Accruals list.



If no records exist, the program displays the Pending Employee Accruals screen.

2. For existing records, click Update to make required changes; for new records, click Add to enter an accrual record.



3. Whether adding or updating, verify the accrual values in the Type and Table list, the Start and End Dates, and the SOY (start-of-year) Balance fields.

4. Press Tab to move through the fields.

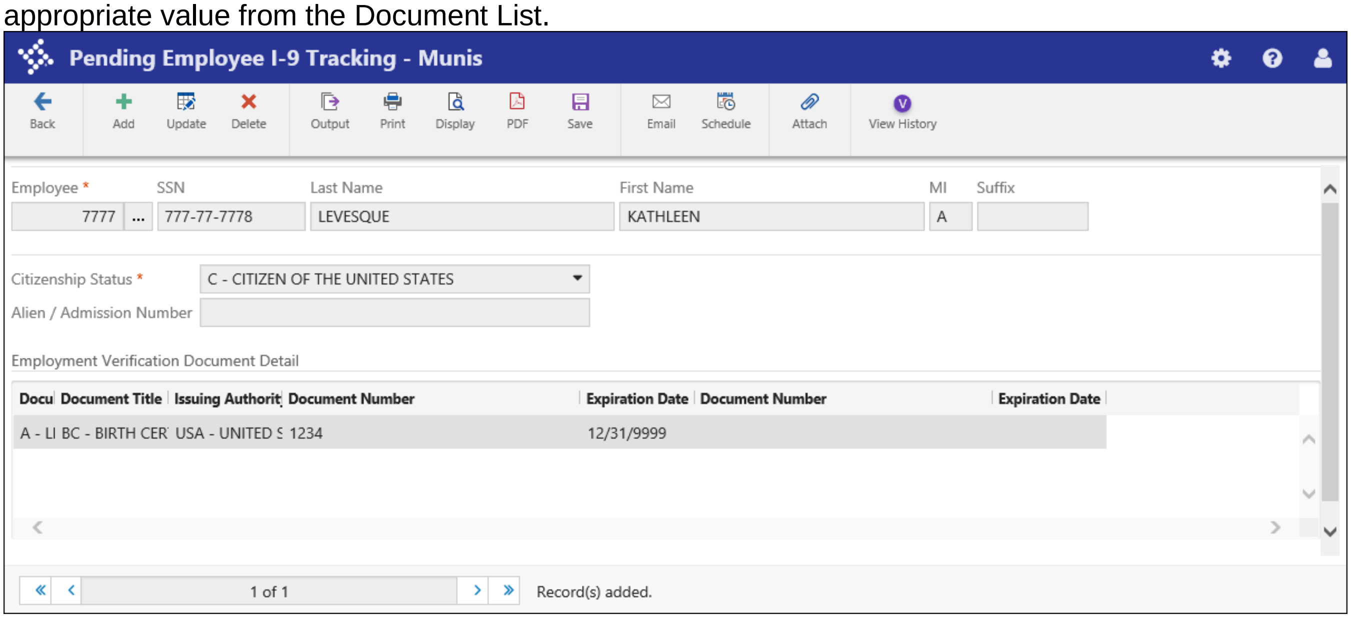
5. Click Accept to save the record.

Employee I-9 Tracking

The Employee I-9 Tracking program tracks an employee's citizenship status and immigration number, as well as the documents provided by employees to verify employment eligibility. You can also produce reports that indicate the expiration of employees' employment verification.

To manage I-9 details:

1. Select Employee I-9 Tracking from the Detail menu.
   The program displays the Pending Employee I-9 Tracking program.
2. Click Add.
   The program completes the employee details according to the record selected in the Personnel Actions Entry program.
3. Press Tab to the Citizenship Status list and select the appropriate value.
4. If either Authorized Alien or Lawful Permanent Resident values are selected, enter the correct Alien or Admission number issued by the US Government in the Alien/Admission Number field.
5. Press Tab to move to the Employment Verification Documents section and select the appropriate value from the Document List.



Refer to the instructions provided on Federal Form I-9 Employment Eligibility Verification for guidance on eligible documentation and what values to assign based on documents provided by the employee.

Field	Description	Notes
Employee	Contains the employee number. The number must exist in the Employee Master program. When you are adding a record and you complete this box, press Tab and the program completes the remaining employee detail fields from the employee master record. When you click Search and complete this box, press Enter and the program completes the remaining employee detail fields from the employee master record.	

Field	Description	Notes
SSN	Contains the Social Security number for the employee. When you click Search and complete this box, press Enter and the program completes the Employee and Names boxes.	
Last Name First Name MI	Contain the employee's last name, first name, and middle initial. The program completes these boxes when you enter a Social Security or employee number during the Search or Add process.	
Suffix	Any suffix (for example, Jr. or II) that is part of the employee name.	
Citizenship Status	Identifies the employee's citizenship state according to Form I-9. Options are C-Citizen of the United States, N-Noncitizen National of the United States, R-Lawful Permanent Resident, and A-Authorized Alien.	
Alien/Admission Number	Contains the ID number that corresponds to the selected citizenship status of Lawful Permanent Resident or Authorized Alien. This box contains up to 30 characters of text.	
Employment Verification Document Detail		
Document Type	Indicates the type of verification document.	
Document Title	Identifies the code for the document title. Codes must be established in Miscellaneous Codes for code type I9TI—Document Titles.	
Issuing Authority	Identifies the code for the agency or organization that issued the documentation. Codes must be established in the Payroll Miscellaneous Codes program for code type I9AU— I-9 Issuing Authorities.	
Document Number	Contains the document number.	
Expiration Date	Contains the document expiration date. If a document has multiple expiration dates, the program uses the earliest date as the expiration date.	
Document Number	Contains an additional document for the same document type.	
Expiration Date	Contains the document expiration date for the additional document.	

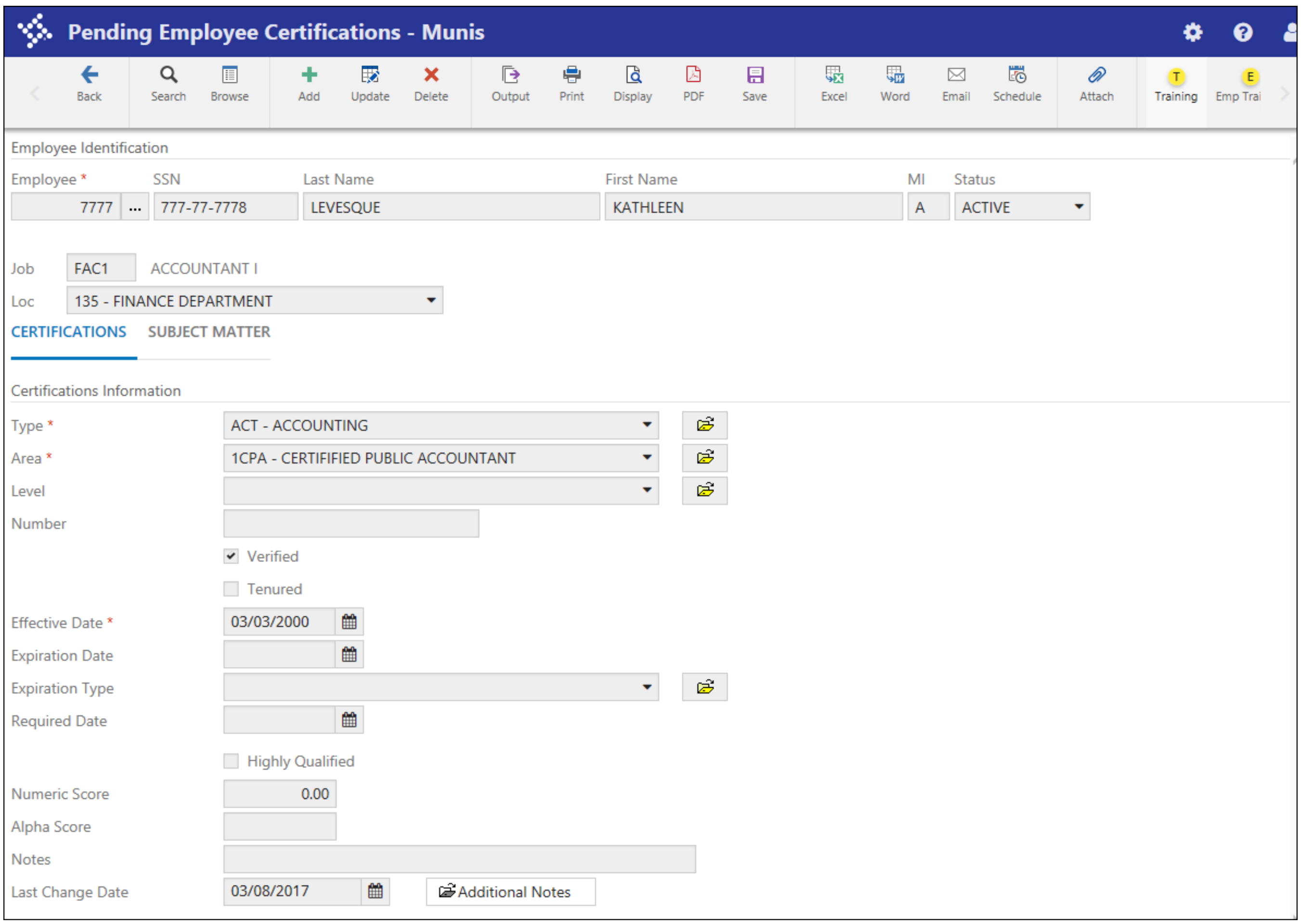
6. Click Accept to complete the entry process.
7. Click Add to add additional documents and repeat above steps as necessary to record all required documentation.

Employee Certifications

Employee Certifications tracks employee's professional certification or licenses records. If your organization uses Munis Recruiting and the applicant provided this information, the program completes this information.

To enter certifications:

1. Select Employee Certifications from the Detail menu in the Pending Employee Master program. The program opens the Employee Certifications program.
2. Click Add.
   The program completes the Employee Identification values according to the record selected in the Personnel Actions Entry program.



3. Complete the remaining fields, using the following table as a guide, and then click Accept to save the certification record.

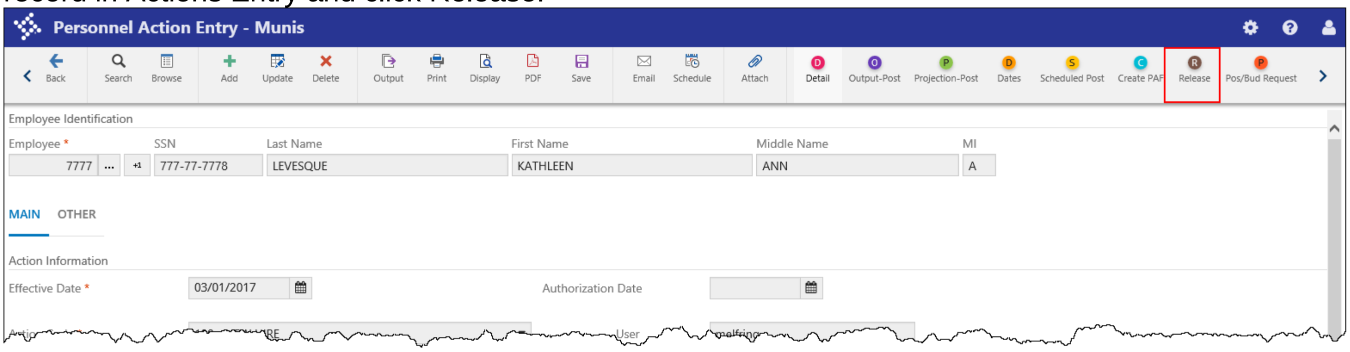
Field	Description	Notes
Employee	Employee number.	
SSN	Employee Social Security number.	
Last Name First Name MI	Contain the last name, first name, and middle initial for the selected employee.	
Status	Indicates the employee's current employment	

Field	Description	Notes
	status.	
Job	Box identifies the employee's job class from Employee Master.	
Location	Indicates the employee's primary location from Employee Master.	
Certifications Tab		
Type	Identifies certification type code to identify an accreditation. Certification type codes (CERT) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes, where you can view/maintain the codes. Note: The list options display skill level (SKLL) codes to identify skills and identification if the Use Certification Level check box in Personnel Settings is not selected; if this check box is selected, this list displays certification level (CERL) codes.	
Area	Identifies the certification area code. Certification area codes (AREA) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes to maintain the codes. Note: The list options display skill level (SKLL) codes to identify skills and identification if the Use Certification Level check box in Personnel Settings is not selected; if this check box is selected, this list displays certification level (CERL) codes.	
Level	Indicates the certification level code. Certification level codes (CERL) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes, where you can view/maintain the codes. Note: The list options display skill level (SKLL) codes to identify skills and identification if the Use Certification Level check box in Personnel Settings is not selected; if this check box is selected, this list displays certification level (CERL) codes.	
Number	Contains an authorized number (if available) from the certificate or license. The number or identifier can contain up to 20 characters.	
Verified	If selected, indicates that the information for this employee has been verified.	
Tenured	If selected, this check box indicates that the employee is tenured in this discipline or subject.	
Effective Date	Contains the effective date of the	

Field	Description	Notes
	certificate/license.	
Expiration Date	Contains the expiration date of the certificate/license.	
Expiration Type	Indicates the expiration type. Expiration type codes (EXPT) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes, where you can view/maintain the codes.	
Required Date	Indicates the date by which the license/certification is required.	
Highly Qualified	If selected, indicates that the employee is highly qualified under the No Child Left Behind Act (NCLB) in this discipline/subject.	
Numeric Score	Contains a numeric score related to the discipline/subject. You can enter whole numbers, decimals up to two digits, or both (for example, 100, 99.5, 78.25).	
Alpha Score	Alphabetic score related to the discipline/subject. You can enter up to 6 characters.	
Notes	Contains notes applicable to this certification. This box contains up to 40 text characters.	
Last Change Date	Indicates the last date that this record was changed. The program displays this date; it is display only.	
Subject Matter Tab		
Discipline/Subject	Identifies the subject matter code. Subject matter codes (SUBJ) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open the Payroll Miscellaneous Codes program to maintain the codes. You can enter up to four subject matter areas, with associated hour amounts.	
Level	Indicates the certification level code. Certification level codes (CERL) must exist in the Payroll Miscellaneous Codes program. Click the folder button to open Payroll Miscellaneous Codes, where you can view/maintain the codes.	
Semester Hours	Contains the number of semester hours related to the subject. You can enter up to semester hour amounts, with associated discipline/subject areas.	

Workflow Release

When employee records are added or updated using the Action Entry program, find the employee record in Actions Entry and click Release.



The program displays a confirmation message; click Yes to release the action into the Workflow notification and approval chain.

During the Munis Workflow process, each Approver launches the next step by clicking Approve. If a review indicates a need for corrections, Approvers can click Reject to reject an action and send a message back to the person who released it for correction. Use the message to indicate what needs to be fixed. It is also possible for an approver to make the corrections and approve the action for further review and posting.

Action Posting

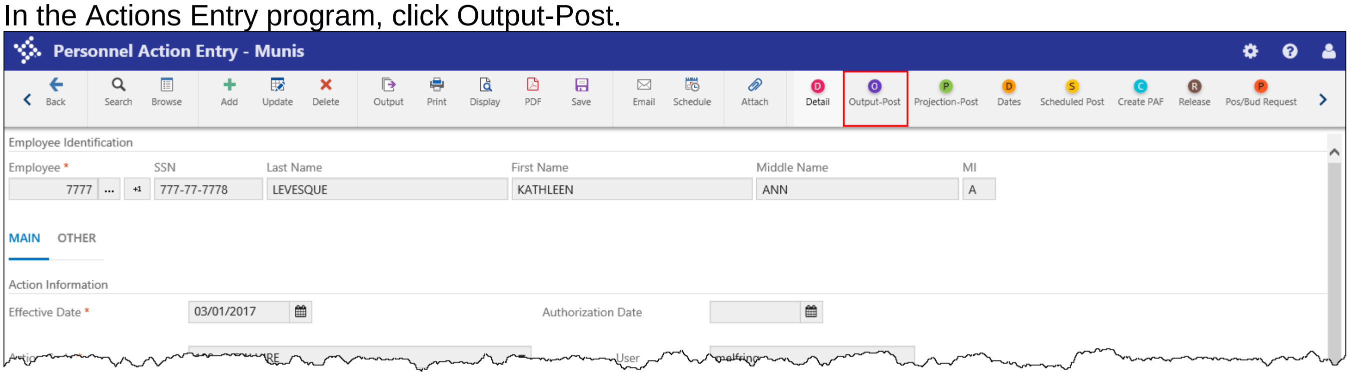
When actions are fully approved (that is, all workflow approval steps have been processed and the Workflow Status indicates Approved), the action can be posted to the live data files.

In order for an action to be posted:

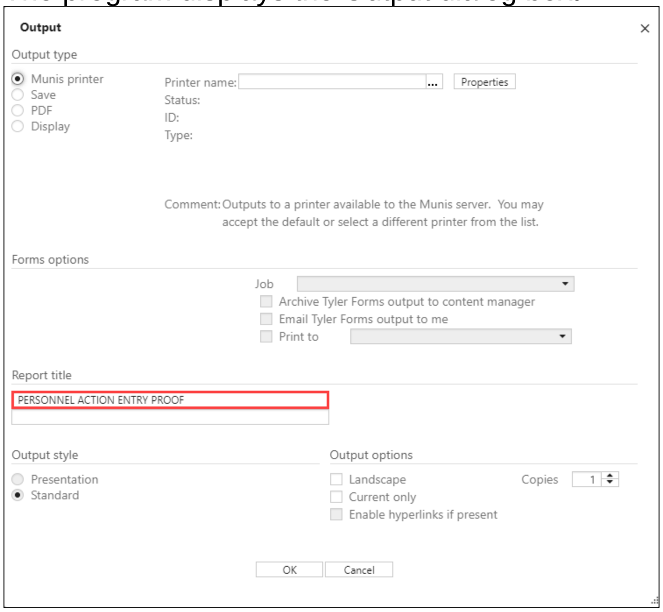
- The action must have Approved indicated in the Workflow Status list.
- Any checklist attached must have all required steps completed and dated.
- For posting a single action, the program must display “1 of 1” in the navigation field.

To post an action:

1. In the Actions Entry program, click Output-Post.



The program displays the Output dialog box.



2. Select the output type and settings to create the proof report.
   This report will highlight all the changes that this posting will make to live data records.
3. Click OK.
4. Review the report carefully.
5. If there are no errors, click Yes to post the data; if the report indicates errors, click No and repeat the Output-Post process once the errors are corrected. Once records are posted, changes are available in the Employee Master and Employee Inquiry programs.

```
03/08/2017 10:18                  |Munis                                                                           |P        1
melfring                          |PERSONNEL ACTION ENTRY PROOF                                                    |pmactpen

TYPE                      SUPPT REASON                         SSN          EMPLOYEE                               ENTRY DATE  EFFCT DATE
100  NEW HIRE                                                  777-77-7778    7777  LEVESQUE, KATHLEEN             03/08/2017  03/01/2017
COMMENT:
NOTES:
  CHANGES

  MASTER RECORD ADDED - NAME: LEVESQUE, KATHLEEN A   STATUS: A   JOB CLASS: FAC1   LOC: 135    GROUP/BU: 10A
  ACCOUNT: 1000-0-000-000-00-00-0000-0-5110  -

  HOME ADDRESS RECORD ADDED - ONE TYLER DRIVE  YARMOUTH, ME 04096

  DEDUCTION RECORD ADDED - 1000 FICA -   START DT: 03/08/2017  END DT: 12/31/9999  EMPE AMT/PCT: 6.2000  EMPE LIMIT: 6621.6000
  EMPR AMT/PCT: 6.2000  EMPR LIMIT: 6621.6000

  DEDUCTION RECORD ADDED - 1100 MEDICARE -   START DT: 03/08/2017  END DT: 12/31/9999  EMPE AMT/PCT: 2.5000  EMPE LIMIT: 0.0000
  EMPR AMT/PCT: 2.5000  EMPR LIMIT: 0.0000

  DEDUCTION RECORD ADDED - 3000 FEDERAL INCOME TAX -   START DT: 03/08/2017  END DT: 12/31/9999

  DEDUCTION RECORD ADDED - 4000 STATE TAX -   START DT: 03/08/2017  END DT: 12/31/9999

  BENEFICIARY RECORD ADDED - LEVESQUE, STEPHEN    DOB: 11/27/1992  GENDER: M  DED:   8015  START DT:            END DT:
  12/31/9999

  DEPENDENT RECORD ADDED - LEVESQUE, STEPHEN    DOB: 11/27/1992  GENDER: M  DED:   8001  START DT: 03/08/2017  END DT: 12/31/9999

  CONTACT RECORD ADDED - FAUSTINA LEVESQUE  RELATION: O     PHONE: 777-777-7789

  CONTACT TELEPHONE RECORD ADDED - HOME  CONTACT SEQ:     1  PHONE SEQ:     2  PHONE: 777-777-7798

  PAY RECORD ADDED - JOB: FAC1 ACCOUNT I - PAY: 101 HOURLY TIME - HRLY:  18.2292  DLY:  134.6154  PER:  2916.67  ANN:  35000.00
  FREQ: B  START DT: 03/08/2017  END DT: 12/31/9999

  PAY RECORD ADDED - JOB: FAC1 ACCOUNT I - PAY: 300 VACATION TIME - HRLY:  18.3854  DLY:  135.7692  PER:  0.00  ANN:  0.00  FREQ:
  B  START DT: 03/08/2017  END DT: 12/31/9999

  PAY RECORD ADDED - JOB: FAC1 ACCOUNT I - PAY: 500 PERSONAL TIME - HRLY:  18.3854  DLY:  135.7692  PER:  0.00  ANN:  0.00  FREQ:
  B  START DT: 03/08/2017  END DT: 12/31/9999
```

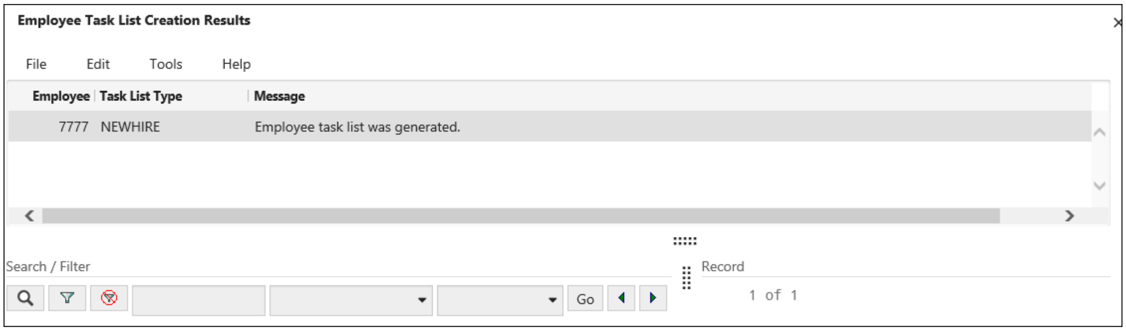
6. On the Post Actions confirmation message, click Yes.

Post Actions

Post current actions set to 'live' data?

Yes   No

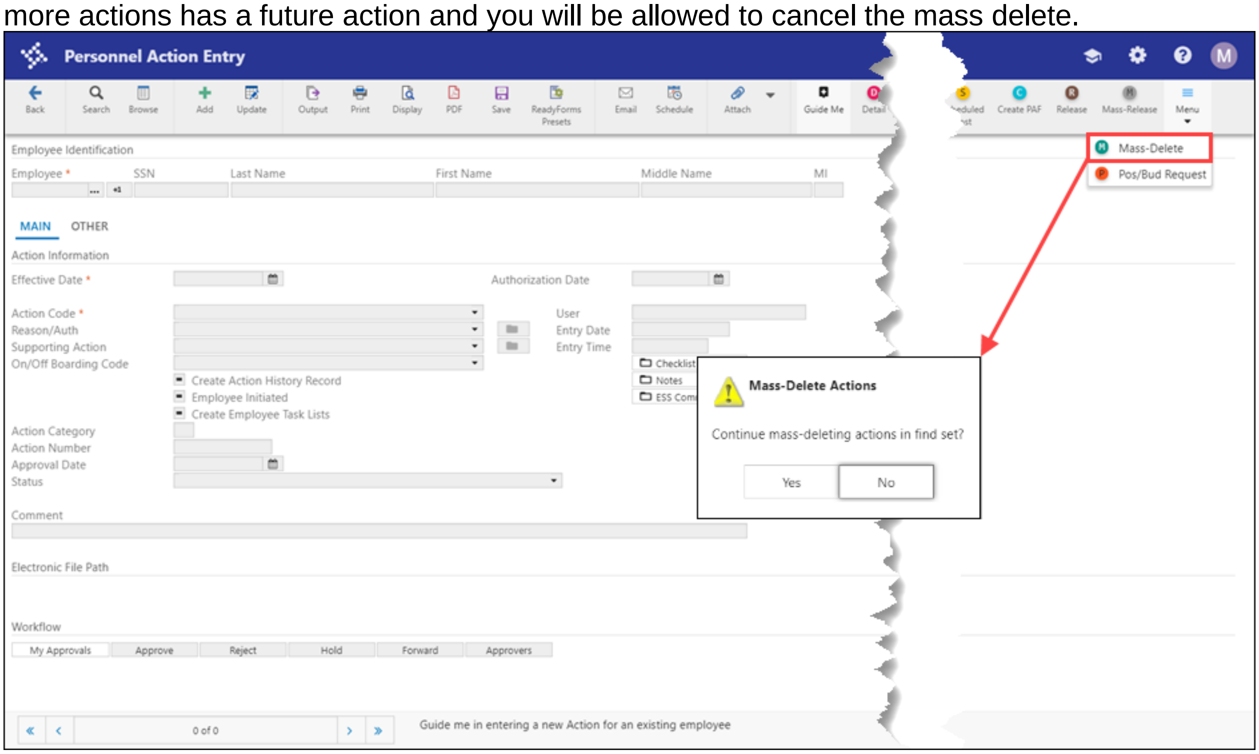
7. If your New Hire action includes creation of a task list, the program confirms that the task list is created and available.



Mass Delete

You can mass delete all records in the find set using the Mass-Delete button on the toolbar. The availability of this function is dependent on your role permissions for deleting, updating, and posting personnel actions.

If any actions in the find set have an action with a later effective date, you will be warned that one or more actions has a future action and you will be allowed to cancel the mass delete.

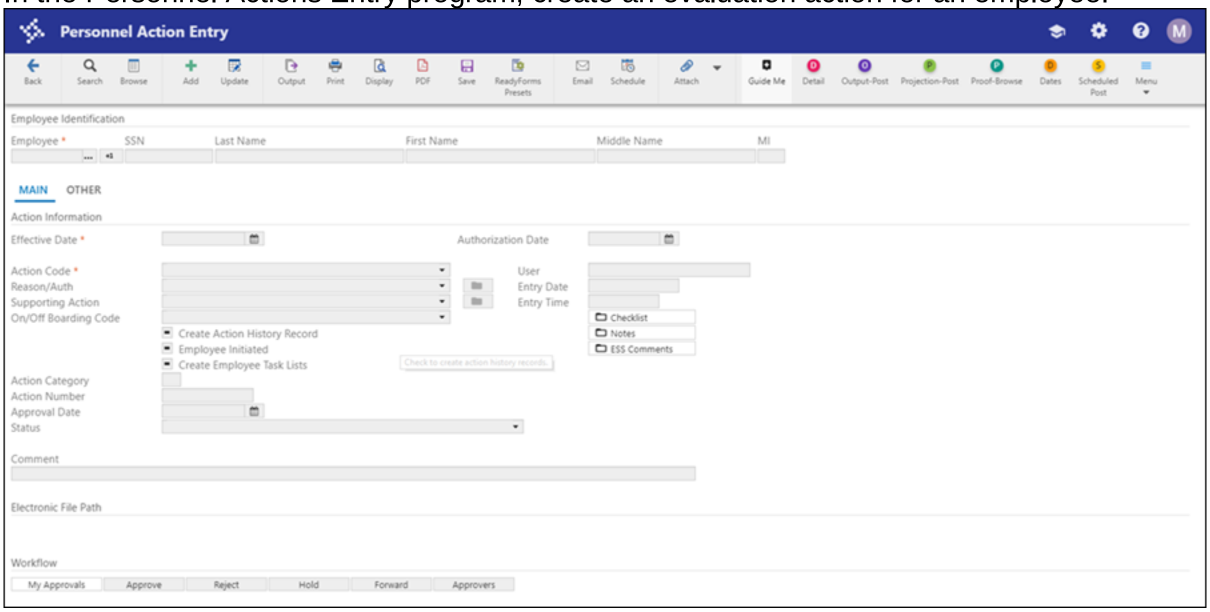


Personnel Action Entry–Employee Evaluations

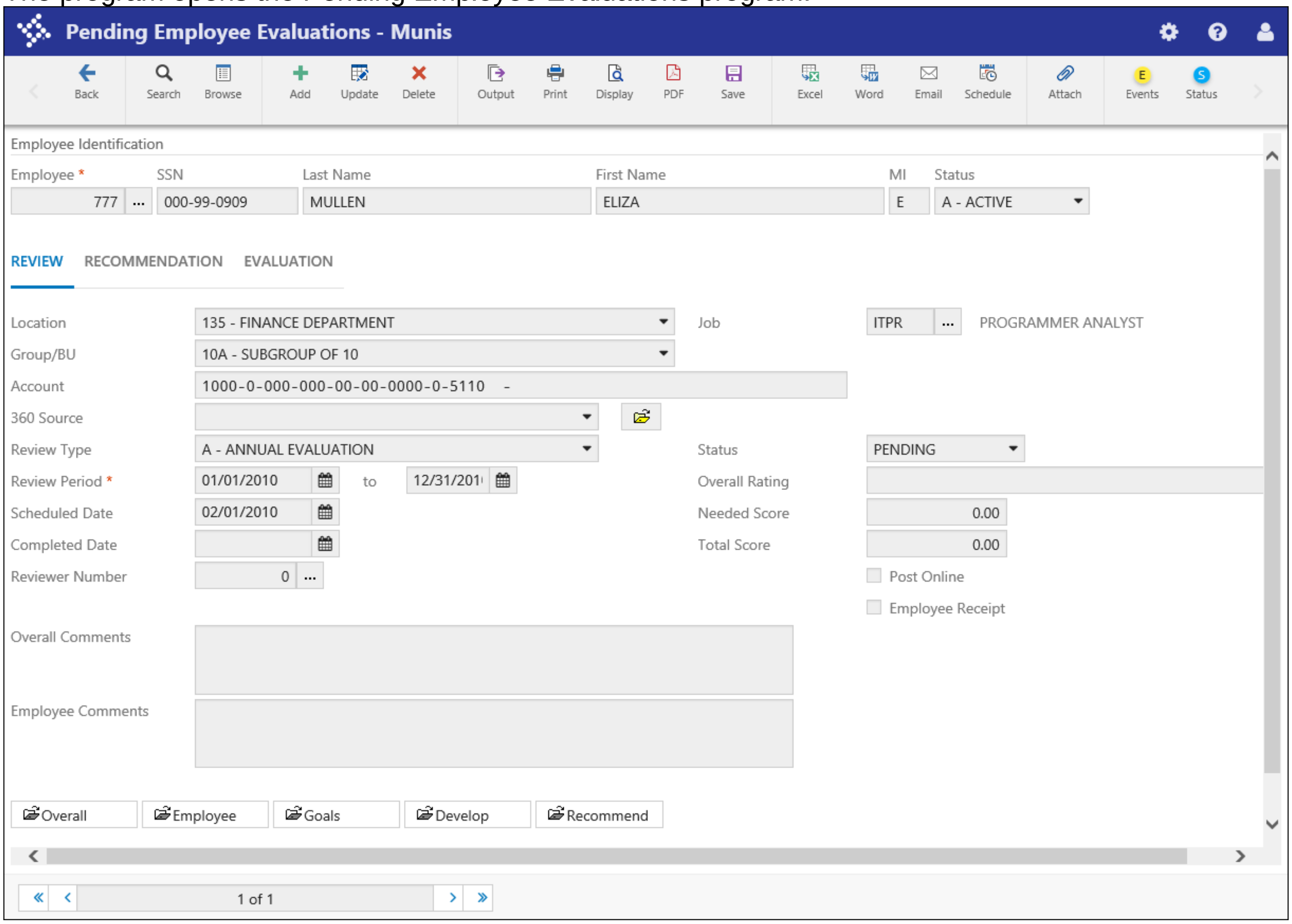
The Employee Evaluations program manages employee evaluations throughout the year. Munis provides tools to allow for tracking of scheduled evaluations based on evaluation due dates and completion status codes. To initiate the evaluation process, enter individual records during the new hire process.

To create evaluation records:

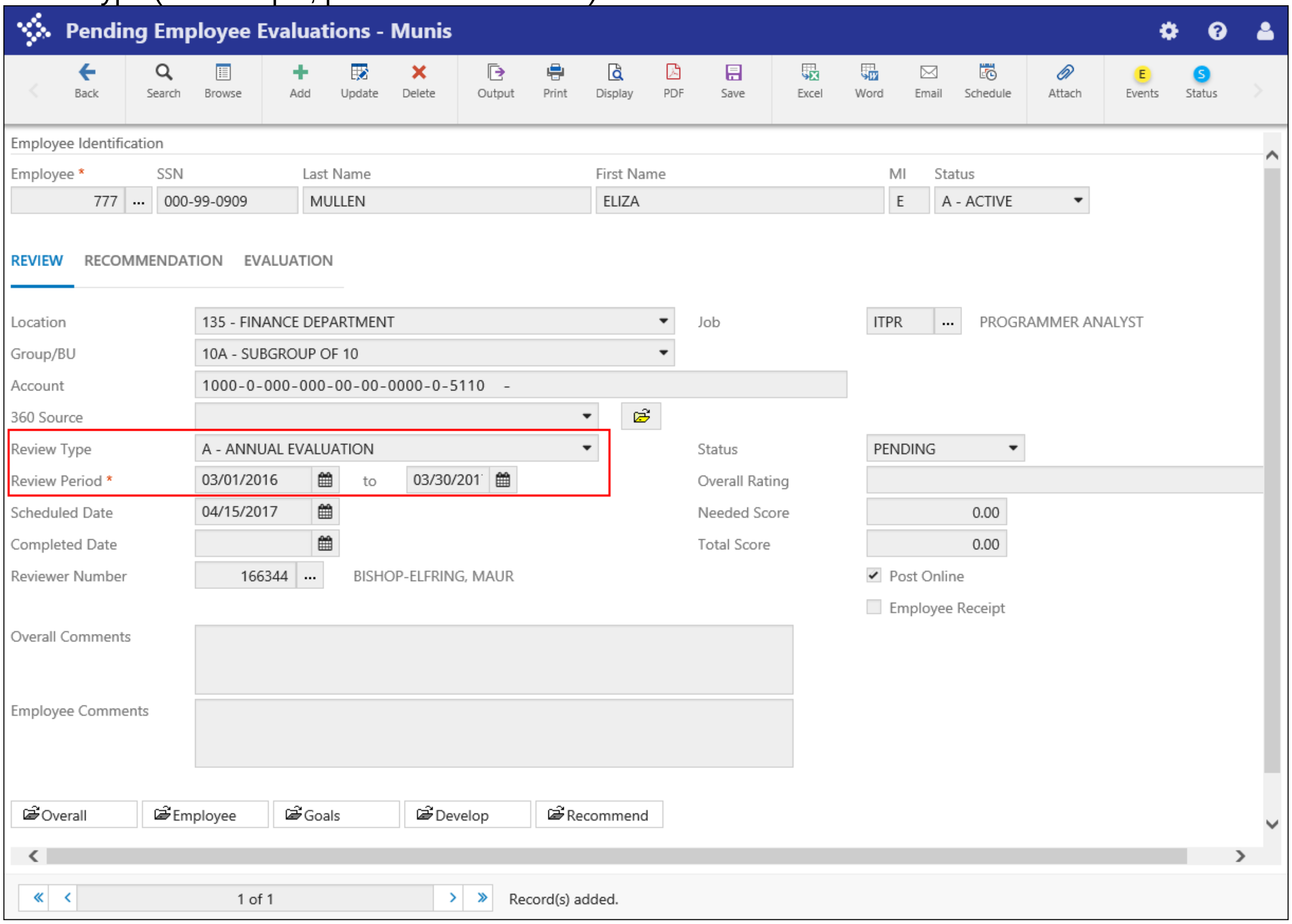
1. In the Personnel Actions Entry program, create an evaluation action for an employee.



2. Select Employee Evaluations from the Detail menu.
The program opens the Pending Employee Evaluations program.



3. Select the Review tab and press Tab to move to the Review Type list select the appropriate review type (for example, probational or annual).



4. Complete the Review Period dates.
   To set up the review process for an annual review for a new employee, enter the hired date as the first date in the Review Period range and enter the hire date plus one year in the To date box of the Review Period range. You should also use the hire date plus one year in the Scheduled Date range for this review.
5. Complete the remaining fields, as required. To use Employee Self Service (ESS) for managing the review, you must select the Post Online check box.
6. Click Accept to save the record.

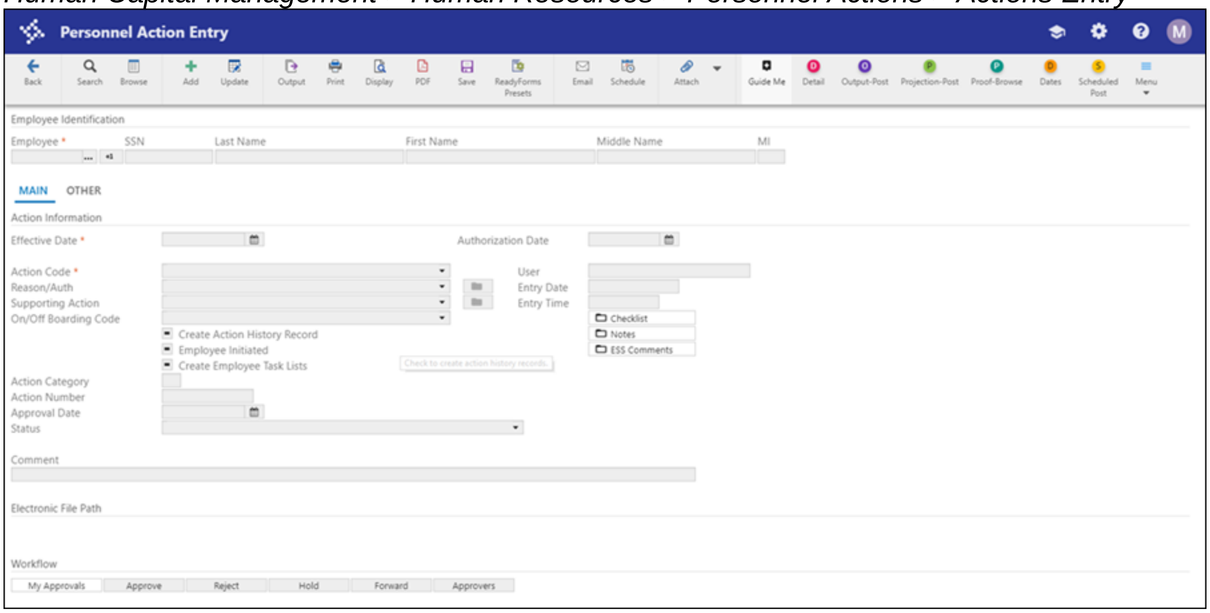
Personnel Action Entry–Rehire/Reinstatement

Rehire or reinstatement entry is the process of returning an employee who was previously made inactive due to resignation or retirement to active status. Inactive employee records may be found in the current database or the terminated employee archive.

Prior to beginning this process, it is important to find the employee's original employee number and to use that same value for the employee number during rehire.

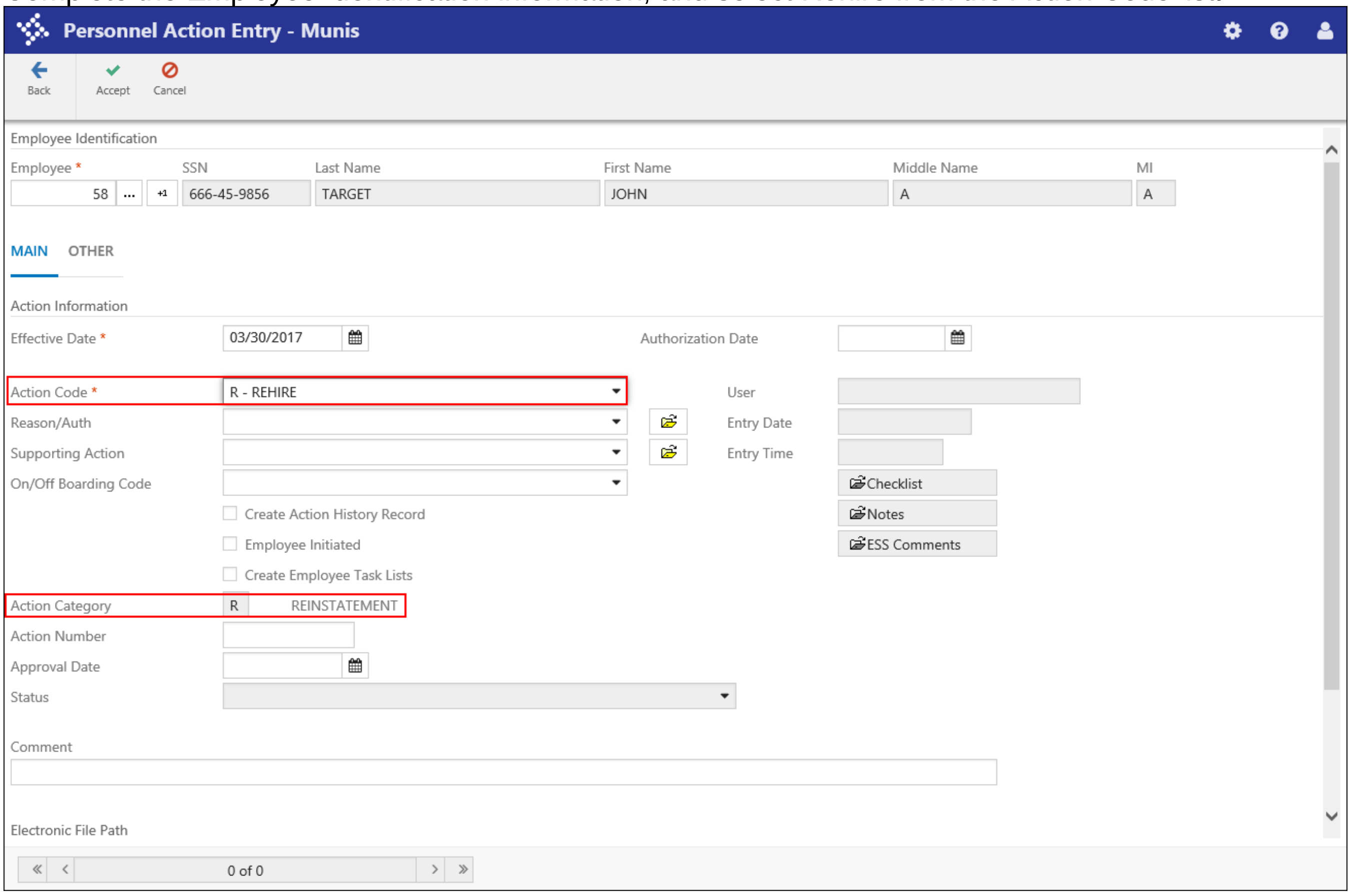
To complete the rehire process:

1. Open the Actions Entry program.
   Human Capital Management > Human Resources > Personnel Actions > Actions Entry



2. Click Add to add a new record.

3. Complete the Employee Identification information, and select Rehire from the Action Code list.



4. Press Tab to move through the remaining fields, completing the details, as required.
5. Click Accept.

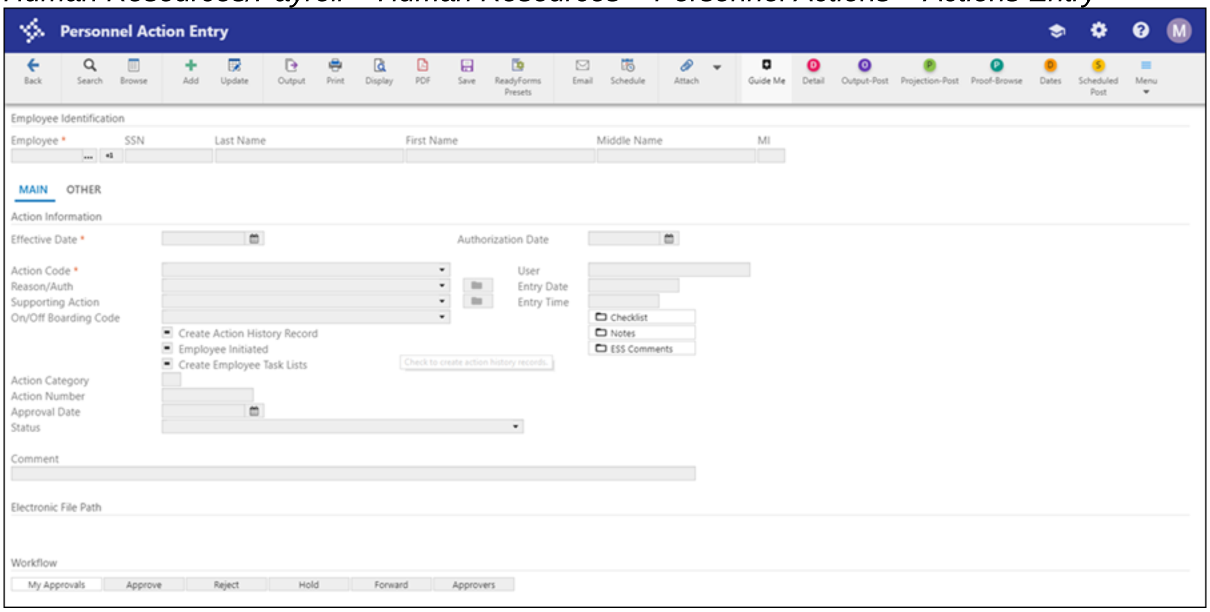
When employees are rehired, you must ensure that all employee records (pay, deductions, benefits, and so on) are current for the active position. Using the Detail menu, use the Employee Master, Employee Pay, and Employee Deductions to delete all records associated with the previous position and to add new records for the rehire job or position.

Personnel Action–Termination/Separation

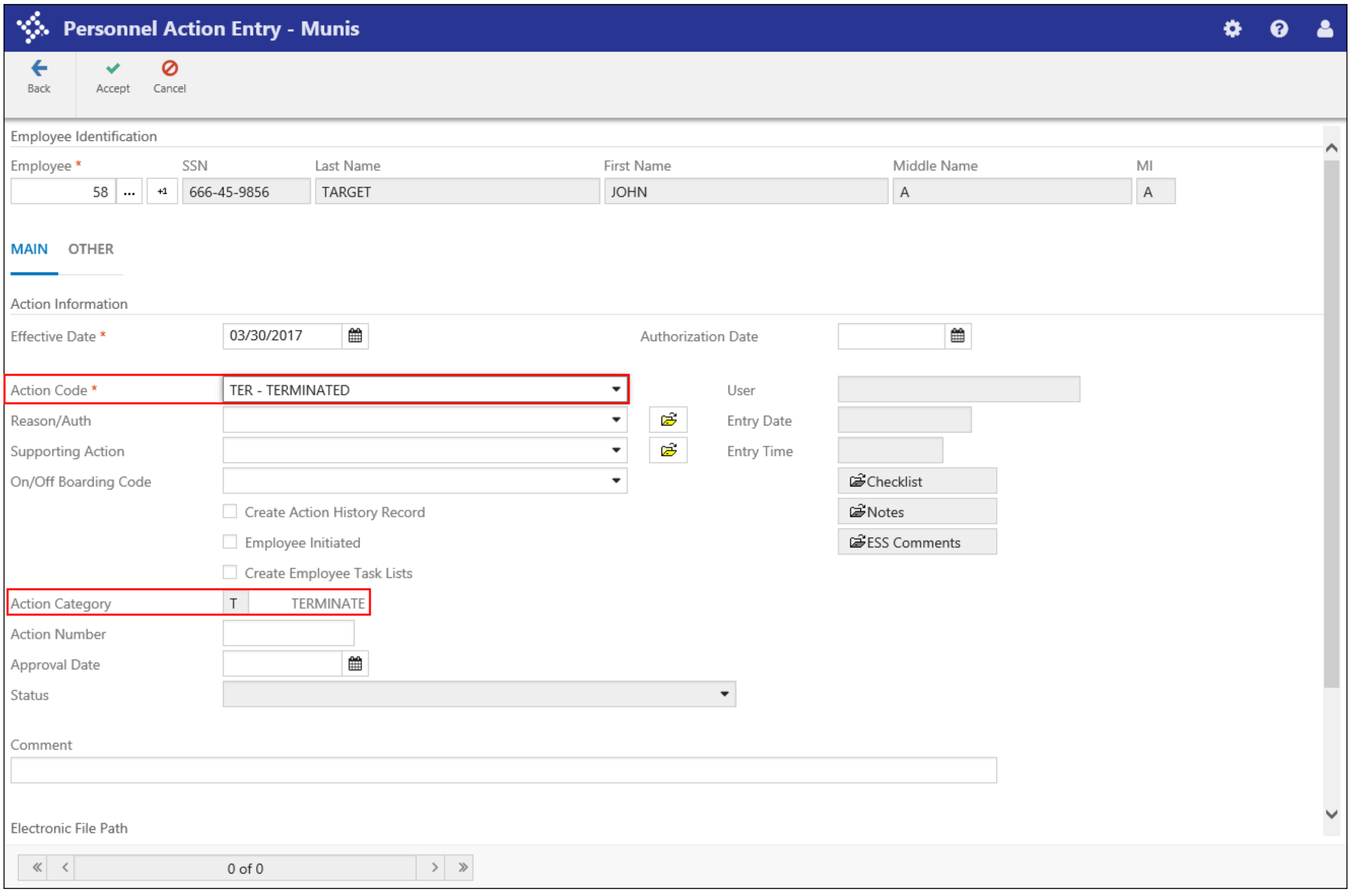
When an employee's services are no longer required, use the Actions Entry program to complete the termination process.

To terminate an employee's service:

1. Open Actions Entry.
   Human Resources/Payroll > Human Resources > Personnel Actions > Actions Entry

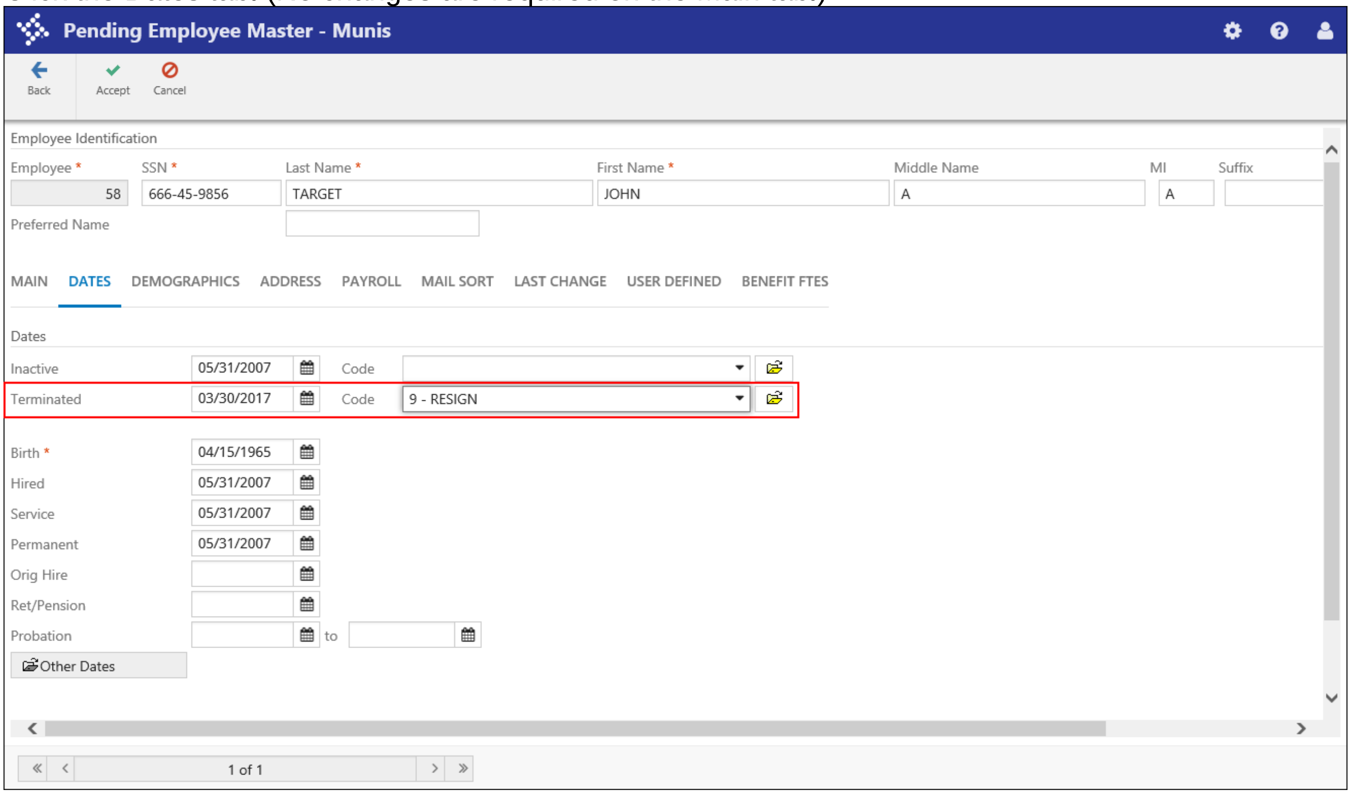


2. Click Add.
3. Enter the employee's employee number and press Tab.
   The program completes the remaining Employee Identification fields.
4. Press Tab to move to the Effective Date box. This is the date the action should be posted to the live database. This may or may not be the actual termination date. In order to correctly calculate a final pay check, the Payroll department needs this information available in advance of the final payroll period.
5. Select Termination from the Action code list.
6. Select a reason for the termination.
7. Completing the remaining fields as required by your organization.



8. Click Accept to save the record.
9. Click Detail on the toolbar and then select Employee Master Main.
   The program displays the Pending Employee Master screen with the terminated employee record as the active record.

10. Click the Dates tab. (No changes are required on the Main tab.)



11. Enter the resignation or termination date in the Terminated Date box.

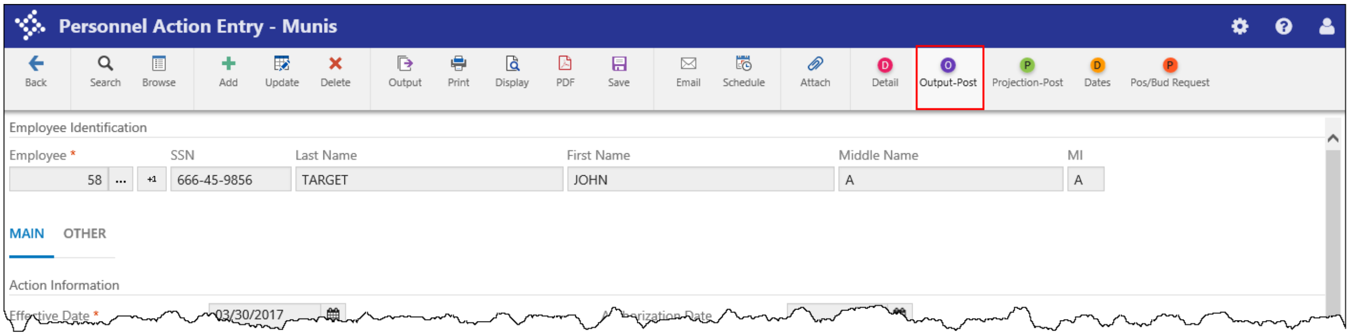
12. Select a reason from the Code list.

13. Click Accept.

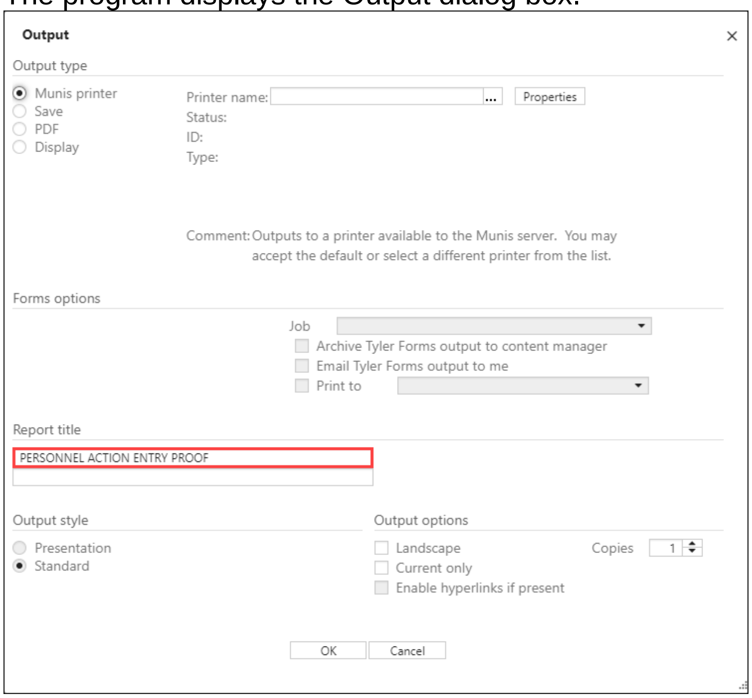
14. Return to the Actions Entry program.

15. If a Termination checklist exists, click the Checklist button and then click Update to indicate those steps are completed.
    Once all data has been entered and records updated, click Release on the Actions Entry screen to release the action to the Workflow approval process.

16. Click Output-Post.



The program displays the Output dialog box.



17. Select the output type and settings to create a proof report, which will highlight all the changes that this posting will make to live data records.
18. Click OK.
    The program displays a Post confirmation box.
19. Review the report carefully.
20. If no errors exist, click Yes to post the change; if errors exist, click No to return to the program and correct the errors.

Actions History Inquiry

The Actions History Inquiry program allows you to find Actions History or Pending Actions records. Actions history records are created when personnel actions are posted. Use the Pending Actions option to view pending personnel actions for the selected employee that have not been posted.

Action history records are created for any deleted personnel action with a status other than Not Released if the Create Action History for Deleted Released Actions box is checked in the Personnel Settings program. These action history records will display an event type of N-Action Deleted-Not Posted.

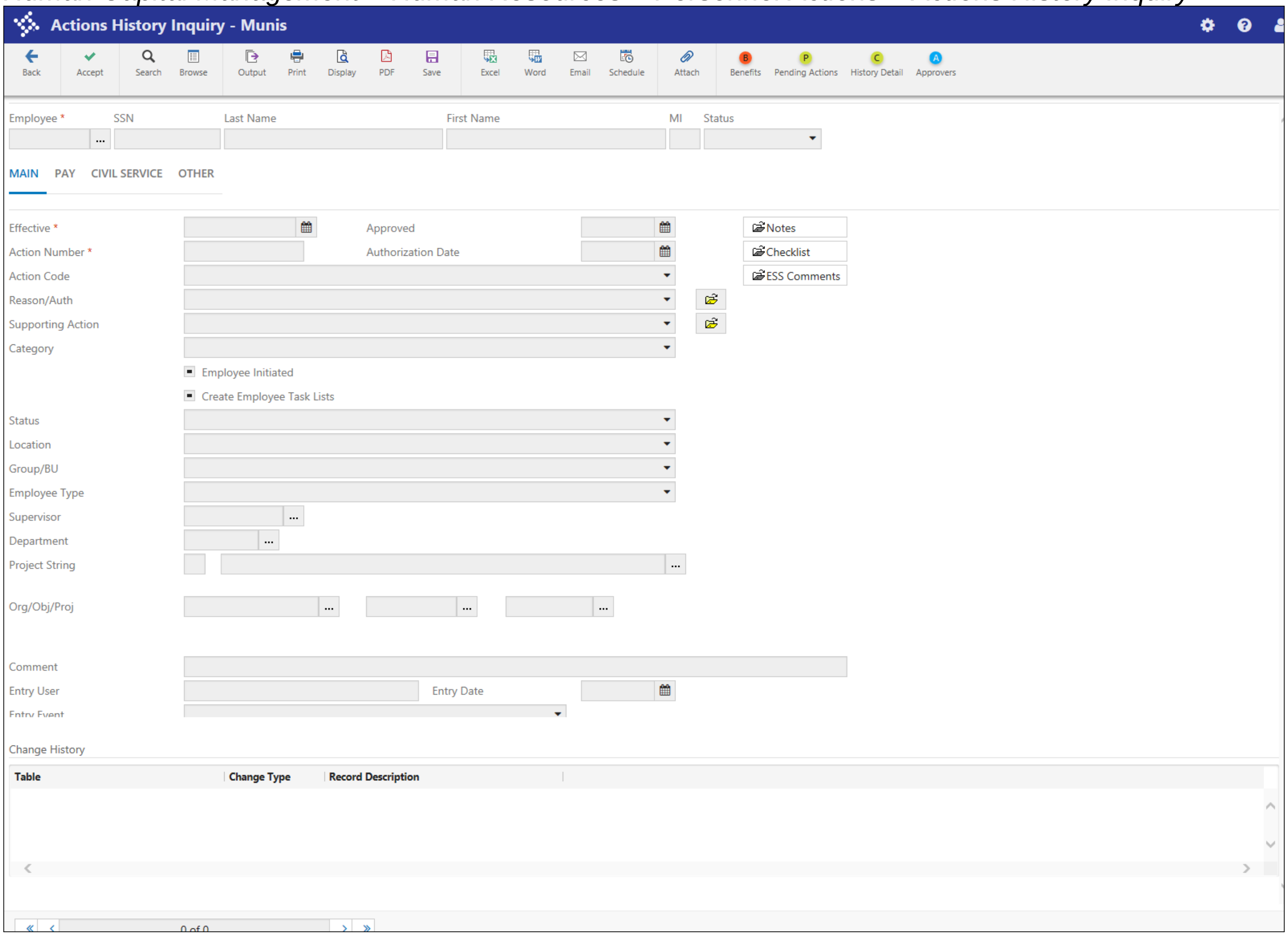
Actions History Inquiry is an inquiry-only program; you cannot update records from this program. Use the Actions History program to make changes.

There are many options for searching and finding records in the Actions History Inquiry program. The following table provides examples for common searches.

To find…	Use this field…
Personnel actions for a specific employee	Enter the employee number or name. See Appendix C Using Wildcard Characters to search using partial name values.
Specific personnel action types	Use the Action Code of Category fields. For example, to find all new hire actions, select New Hire from the Action Code list.
Personnel actions for a specific date or date range	Use the Effective Date box. To find a specific date, enter that date only; to find a range of dates, enter the beginning and ending dates as follows: mmddyy:mmddyy. For example, entering 010111:013111 provides results for the date range 01/01/11 through 01/31/11.

To complete a search for action history records:

1. Open Actions History Inquiry.
   Human Capital Management > Human Resources > Personnel Actions > Actions History Inquiry



2. Click Search to search based a field or combination of fields. See Appendix C for details on using wildcard characters in a search.
3. Click Accept.
   The program displays the first record match the search criteria; click Browse to view a list of all results.
4. Select one of the output options on the toolbar to view, print, or save a report or the search results.

Field	Description	Notes
Employee	Contains the employee number. The employee number must exist in the Employee Master program. When you complete this box and press Enter, the program completes the SSN and Name boxes.	
SSN	Contains the employee's Social Security number.	

Field	Description	Notes
	When you complete this box and press Enter, the program completes the Employee and Name boxes.	
Last Name First Name Middle Name MI Suffix	Contain the employee’s last name, first name, middle name, middle initial, and suffix (if applicable). The program completes these boxes when you enter a Social Security number or employee number and press Enter.	
Status	Identifies the current employment status for the selected employee. If you are searching for a record, select the blank option to include employees with all status codes.	
Main Tab		
Effective	Specifies the date the action took effect.	
Approved	Provides the date the action was approved.	
Action Number	Identifies the action number for the event.	
Authorization Date	Provides the date that the action was authorized by the board, committee, or other authorization team within your organization, if applicable.	
Action Code	Identifies the type of action as entered in Actions Entry.	
Reason/Auth	Specifies the action authorization/reason code. Authorization/reason codes (AUTH) must exist in the Payroll Miscellaneous Codes program.	
Supporting Action	Indicates the supporting action code for the action. When you add a record, the default value is blank. Once you select a code, the program retains it until you change it. For an automatically generated record, the default value is the Supporting Action code selected for that record in Actions Entry. The program retains the code until you change it. For an existing record, the default value is the code selected when the program was last closed. The program retains the code until you change it. Supporting codes are created and maintained in the Payroll Miscellaneous Codes program for the code type ACT2. Click the folder button to open Payroll Miscellaneous Codes to maintain codes.	
Category	Indicates the category code from Actions Entry that is associated with the action type.	
Employee Initiated	If selected, indicates that the action was initiated by the employee in ESS.	
Create Employee	If selected, indicates that the action created	

Field	Description	Notes
Task Lists	employee tasks lists when posted.	
Status	Indicates the current status for the selected job (that is, full-time, part-time, and so on).	
Location	Specifies the location code for the action.	
Group/BU	Indicates the group/ bargaining unit code associated with the action.	
Employee Type	Identifies the employee type.	
Supervisor	Identifies the employee’s supervisor.	
Department	Identifies the department code; the following box contains the organization code, if applicable.	
Project String	Contains the project account associated with the employee action. This box is available if your organization uses Munis Project Accounting.	
Org/Obj/Proj	Provide the org, object, and project codes for the general ledger account associated with the action.	
Comment	Contains any comments regarding the employee or job. This box can contain up to 60 characters.	
User	Contains the user identification for the user who entered the record.	
Entry Date	Indicates the date the record was created.	
Entry Event	Indicates why a history record was created.	
Pay Tab		
Primary Pay Information		
Job Class	Contains the job class associated with the action.	
Pay Type	Provides the pay type for the selected employee.	
Government Job	If selected, indicates if the job is a government job.	
Base Pay	If selected, indicates that this is a base pay item.	
Position	Stores the position control number from the Position Control program.	
Pay Freq	Indicates the pay frequency.	
Start/End Date	Define the range of dates for the pay type code. The payroll generate process uses these dates to determine whether to generate pay.	
Grade/Step	Store the salary grade or step. These boxes are applicable if salary tables apply.	
Num of Pays	Contains the number of pay periods. This works in conjunction with the calculation code to determine the period pay amount. The value comes from the Job Class Master or the Employee Job/Salary program.	
Days/Year	Contains the days-per-year for this pay type.	

Field	Description	Notes
Sched Hrs	Stores the number of scheduled hours for this pay type. The program uses this value in conjunction with the calculation code to determine the period pay amount. The value comes from the Job Class Master or the Employee Job/Salary program.	
Pay Basis	Indicates the pay basis frequency.	
Hours/Day	Contains the hours per day for this pay type.	
Hours/Year	Contains the hours per year for this pay type.	
Days/Period	Contains the number of days per period.	
Factor	Contains the multiplication factor for calculations.	
Months	Contains the number of months the employee has worked.	
Schedule	Specifies the employee's work schedule.	
Contract	Identifies the employee's contract, if applicable.	
Allocation	Identifies an allocation code for the employee record, if applicable.	
Details Tab		
Pay Amounts		
FTE%	Full-time equivalency factor for this pay type.	
Hourly Rate	Stores the hourly rate. You can change a default value for calculation codes with hourly rates.	
Hourly Rate/Recurring Pay	Stores the hourly rate for recurring pay (that is, this pay type plus add-to-base pay).	
Daily Rate	Indicates the daily rate. You can change a default value for calculation codes with daily rates.	
Daily Rate/Recurring Pay	Indicates the daily rate for recurring pay (that is, this pay type plus add-to-base pay). You can change a default value for calculation codes with daily rates.	
Period Pay	Period pay amount. You can change a default value for calculation codes with period pay amounts.	
Period Pay/Recurring Pay	Stores the period pay amount for recurring pay (that is, this pay type plus add-to-base pay). You can change a default value for calculation codes with period pay amounts.	
Annual Sal	Stores the annual salary amount. You can change a default value for calculation codes with annual salary amounts.	
Annual Sal/Recurring Pay	Contains the annual salary amount for recurring pay (this pay type plus add-to-base pay). You can change a default value for calculation codes with annual salary amounts.	

Field	Description	Notes
Extended Employment		
EEP Number	Identifies the employee's extended employment number.	
Years	Provides the number of years since the service date.	
Weeks	Provides the number of weeks of extended employment.	
Hrs/Week	Specifies the hours per week used to calculate extended employment weeks.	
GL Accounts Tab		
	Displays the general ledger accounts associated with the employee pay.	
Civil Service Tab		
Civil Service	Indicates the civil service code for the action.	
Retirement Number	Contains the employee's retirement number, if applicable.	
Classification	Indicates the civil service classification code (CIVC) for the action. When you add a record, the default value is blank. Once you select a code, the program retains it until you change it. For an automatically generated record, the default value is the civil service classification code from the Employee Job/Salary program. The program retains the code until you change it. For an existing record, the default value is the code selected when the program was last closed. The program retains the code until you change it. Civil service classification codes are created and maintained in the Payroll Miscellaneous Codes program.	
Status	Indicates the civil service classification status code (CVCS) for the action. When you add a record, the default value is blank. Once you select a code, the program retains it until you change it. For an automatically generated record, the default value is the civil service classification status code from the Employee Job/Salary program. The program retains the code until you change it. For an existing record, the default value is the code selected when the program was last closed. The program retains the code until you change it. Civil service classification status codes are	

Field	Description	Notes
	created and maintained in the Payroll Miscellaneous Codes program.	
Start Date	Contains the start date of this classification and status combination.	
Probation End	Indicates the probationary end date of the civil service classification, if applicable.	
Expiration Date	Contains the expiration date of this classification and status combination.	
Retention Date	Contains the retention date of this classification and status combination.	
Designation	Identifies the employee's civil service designation (for example, union or nonunion).	
Status	Identifies the employee's civil service designation status (for example, part-time).	
Comments	Contains comments related to the employee's civil service record.	
Other Tab		
Injury		
Injury Code	Contains the injury code identifying the injury related to the action.	
Risk	Contains the injury risk code related to the action.	
Payment Code	Contains the injury payment code.	
Payment	Indicates the payment amount associated with the injury action.	
Insurance Credit	Indicates the insurance credit amount for the injury payment.	
Evaluations		
Evaluation Score	Contains the evaluation score as entered from Actions Entry (if Actions Entry has been updated).	
Pay Off		
Amount	Provides the payoff amount.	
Type	Indicates the payoff type for the action.	
Leave		
Return Date	Estimated date the employee will return, if applicable. This date is completed from Actions Entry.	
Leave Length	Displays the length of leave, if the action category on the Main tab is Leave. This time is completed from the Actions Entry program.	
Leave Comment	Contains comments related to the employee leave. This box contains up to 20 characters.	
Seniority Impact	Indicates that the leave time is not to be added	

Field	Description	Notes
	to time for seniority.	
Change History		
	Identifies the table that was changed, the type of change, and a brief description.	

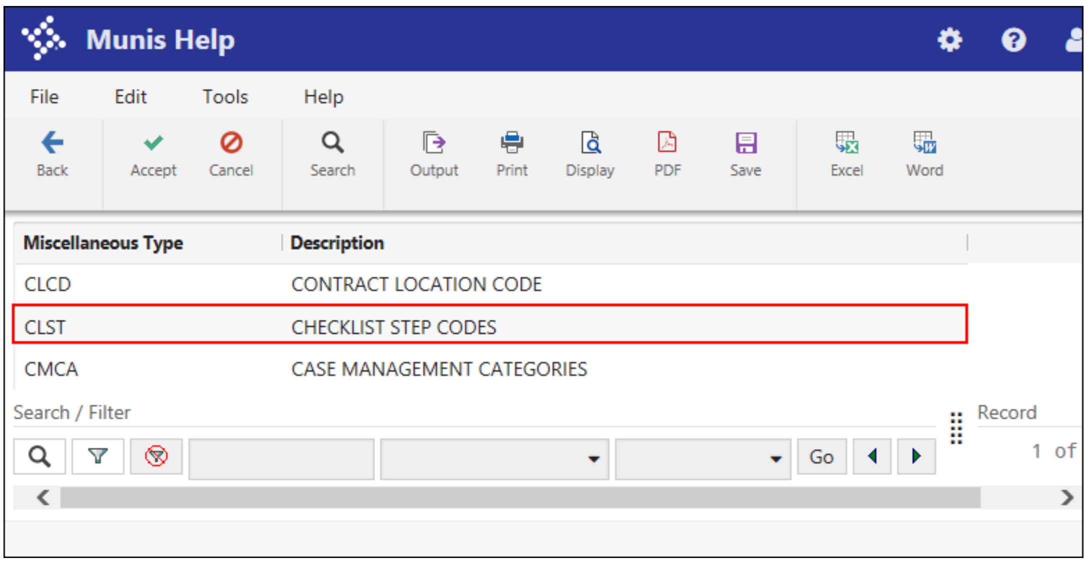
Appendix A—Checklists

Checklists are often attached through Personnel Actions. These optional lists serve as reminders on certain steps or actions that need to be completed in order to hire a new employee (new hire checklist) or terminate an employee (termination checklist). In order to use Checklists, the Checklist Step codes must be established, and then Checklists can be established and attached to personnel actions.

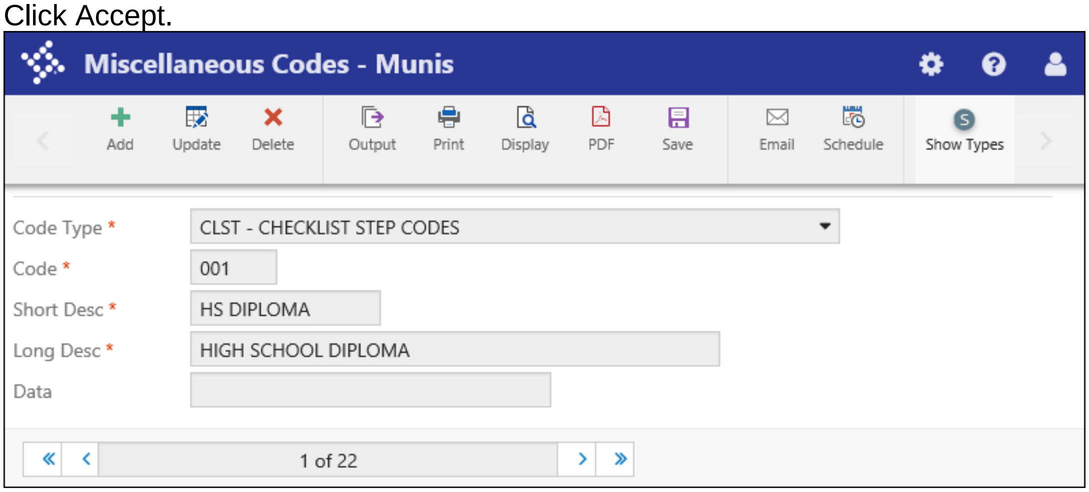
Creating Checklists

To create checklists:

1. Open Payroll Miscellaneous Codes.
   Human Capital Management > Human Resources > Personnel Setup > Payroll Miscellaneous Codes



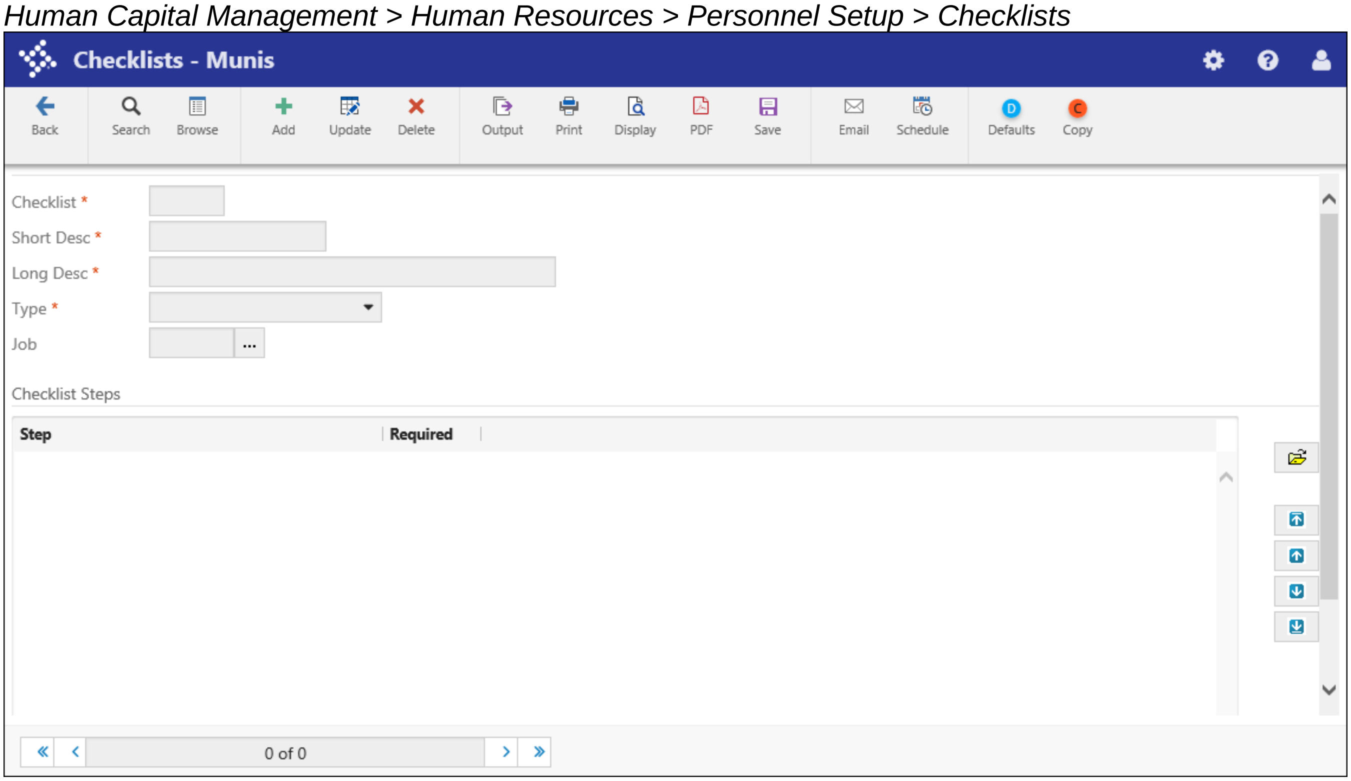
2. Select CLST—Checklist Step Codes from the list of code types.
3. Click Accept.



4. Click Add.
5. Complete the fields to define the checklist step codes.

Field Name	Description	Notes
Code Type	Code type selected from the Code Types list. Click Show Types to select another code type.	
Code	Contains user-defined code for the code type. A code can be up to four characters.	
Short Desc	Short description for the code. It can be up to 10 characters long.	
Long Desc	Long description for the code. It can be up to 30 characters long.	
Data	Data code associated with the code type, if applicable. The code can contain up to 20 characters.	

6. Click Accept to save the record.
7. Continue adding new checklist step codes, as required.
8. Open the Checklists program.
   Human Capital Management > Human Resources > Personnel Setup > Checklists

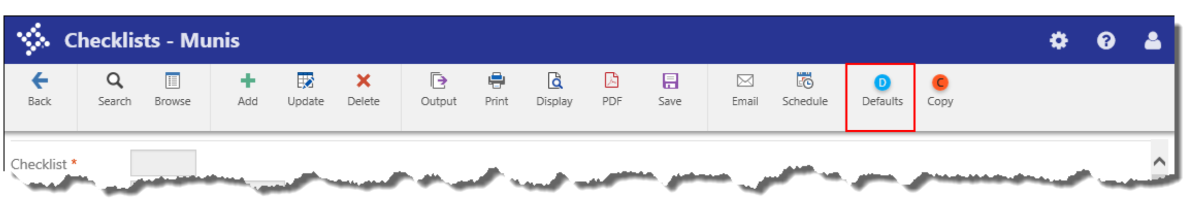


9. Click Add to add a new checklist.
10. Complete the fields to identify the checklist and provide the steps to include. Use the Field Descriptions table as a guide.

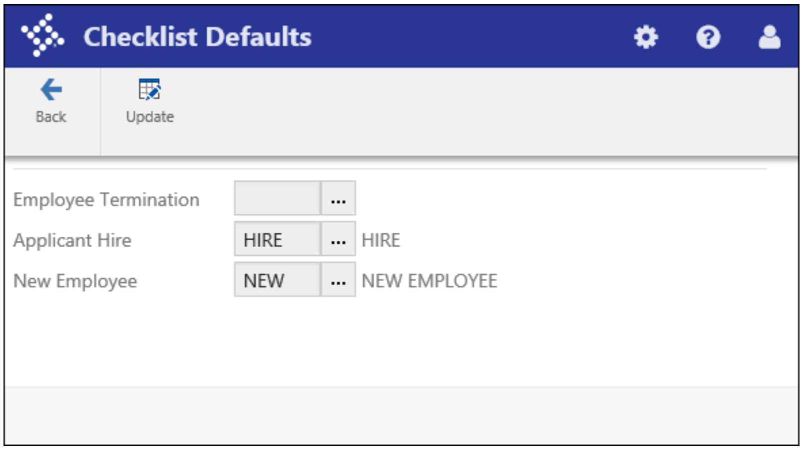
Field Name	Description	Notes
Checklist	Contains a user-defined code that identifies the Checklist. Codes can contain up to four characters.	

Field Name	Description	Notes
Short Description	Contains an abbreviated description of the checklist. The short description can contain up to 10 characters.	
Long Description	Contains a full description of the checklist. The long description can contain up to 30 characters.	
Type	Specifies the category of the checklist. A checklist can be a Case Management, Personnel Action, Applicant, or Employee type.	
Job	Identifies the job class associated with the checklist. Type the job class or click the field help button to select a job class from a list of valid job class codes.	
Checklist Steps		
Step	Indicates the step in the Checklist Steps table. Checklist step codes (CLST) must exist in Payroll Miscellaneous Codes. Click the folder button to open Miscellaneous Codes, where you can view/maintain codes. You can enter multiple checklist steps. Use the Arrow buttons next to the table to change step order.	
Required	This check box indicates when a checklist step is required. If the check box is selected, you must complete that step in the process before moving to the next step.	

11. Click Accept to save the record.
12. Click Defaults to define a default checklist to be used in the specified areas.



The program displays the Checklist Defaults screen.



13. Click Update to enter the default checklist to use for the areas.
14. Click Accept to save the record.
15. Continue adding new checklists as necessary.

Note: The new employee checklist is automatically created when the workflow process is completed or the checklist can be manually attached to an employee by accessing the Checklist button after you have started and saved a Personnel Action from the Personnel Actions Entry screen.

If any steps in the checklist are marked as required and are not marked as completed you will receive a message indicating one or more actions have an incomplete checklist when trying to Output-Post the Personnel Action.

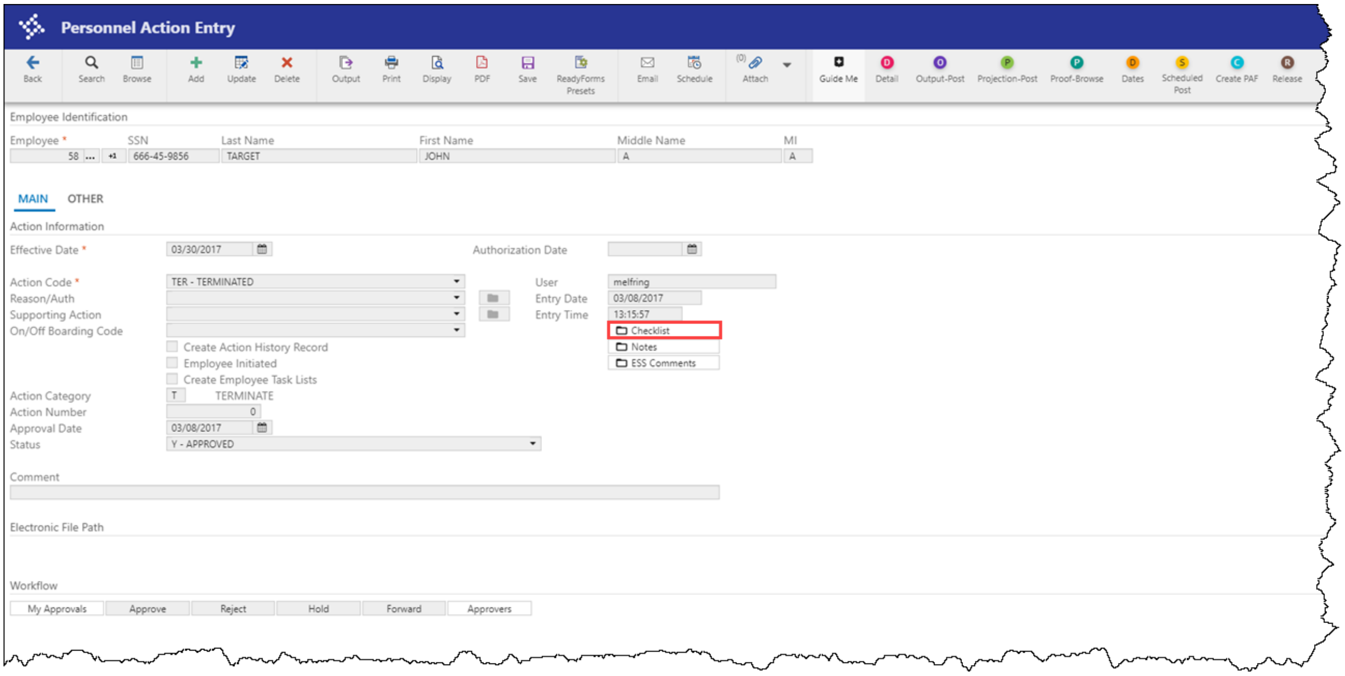
Using Checklists

Employee checklists help you manage a process that required multiple steps. For example, when you are completing the new hire process, using a new hire checklist ensures that you complete all the required steps.

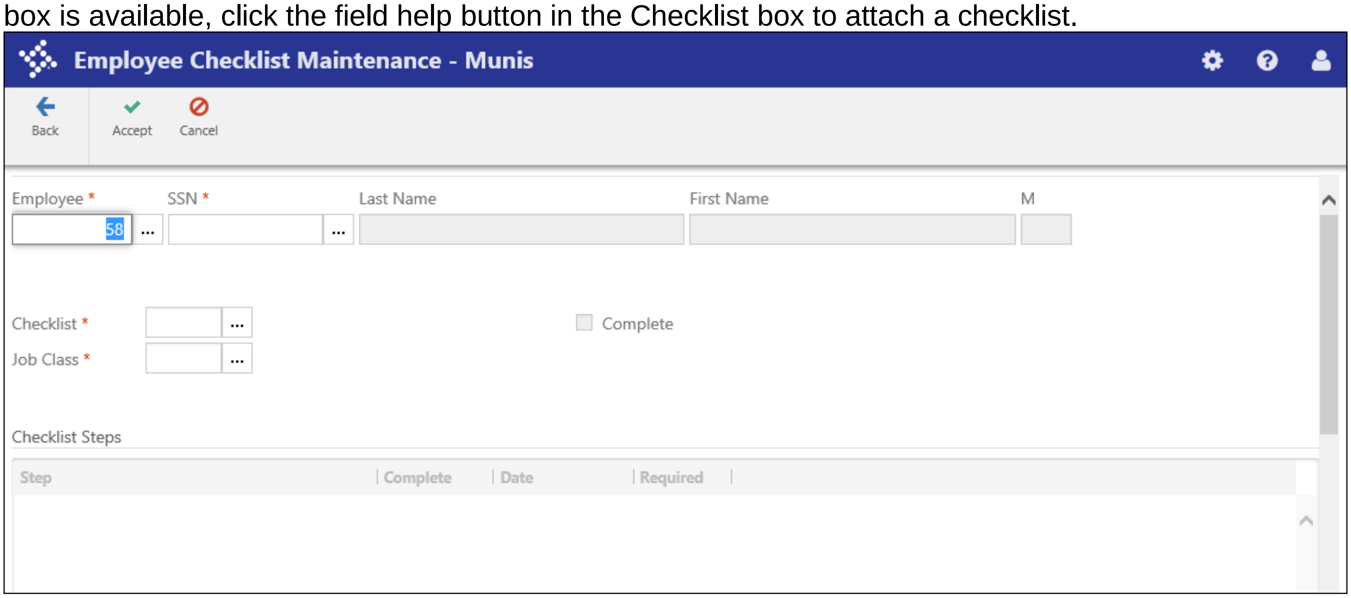
To use a checklist:

1. Open the Actions Entry program and find the employee record to which to attach the checklist.

2. Click Checklist.



The program opens the Employee Checklist Maintenance program. If an existing checklist is associated with the selected employee, the Checklist box indicates the type of checklist. If no check box is available, click the field help button in the Checklist box to attach a checklist.



3. Click Update to select the Complete check box for these steps that are complete.

4. Click Accept.
   The program refreshes to include the checklist steps.
   Once all items on the checklist are completed, the program selects the Complete check box.

Appendix B—On/Off Boarding Codes

Objective

The On/Off Boarding Codes program maintains on- and off-boarding codes that notify employees of steps that are necessary to complete a transition period. You can set the on/off boarding process to automatically send emails when a new hire action is posted, or you can manage the process manually using the On/Off Boarding Codes program.

Overview

To use the on/off boarding process, define the on/off-boarding codes for the activities that new employees should complete. Next, for each code, create the steps required to complete the activity. Once you have created the steps, assign the steps to the on/off boarding codes. You can add as many steps as required to complete an activity.

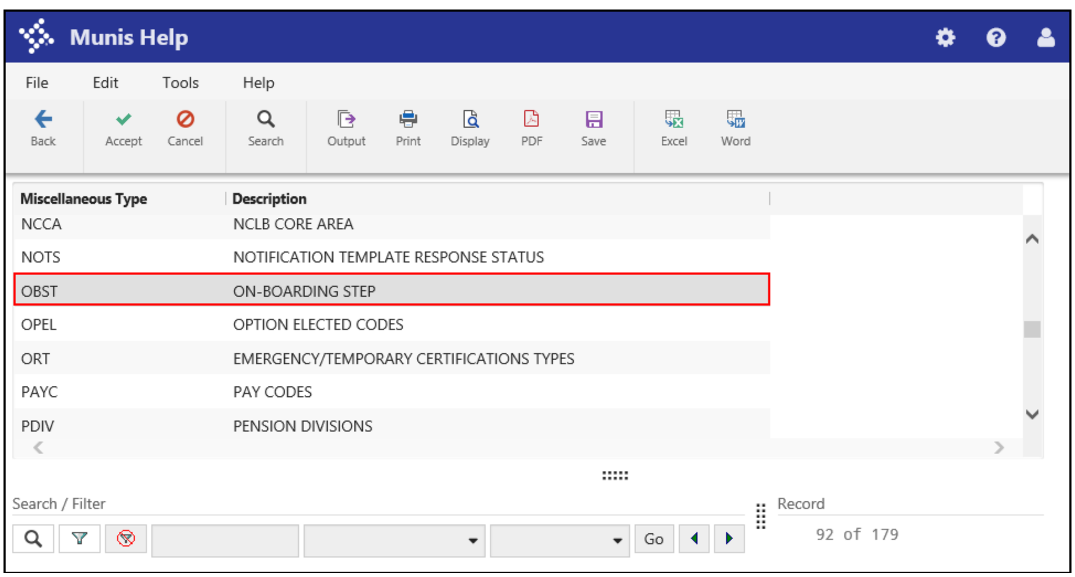
Once you have assigned steps to codes, you can organize them in the order in which the employee should complete them. You can also create personalized email messages that are delivered throughout the process.

Setup

Before creating on-boarding codes, you must create the on-boarding steps, which are maintained in the Payroll Miscellaneous Codes program for the code type OBST—On-Boarding Steps.

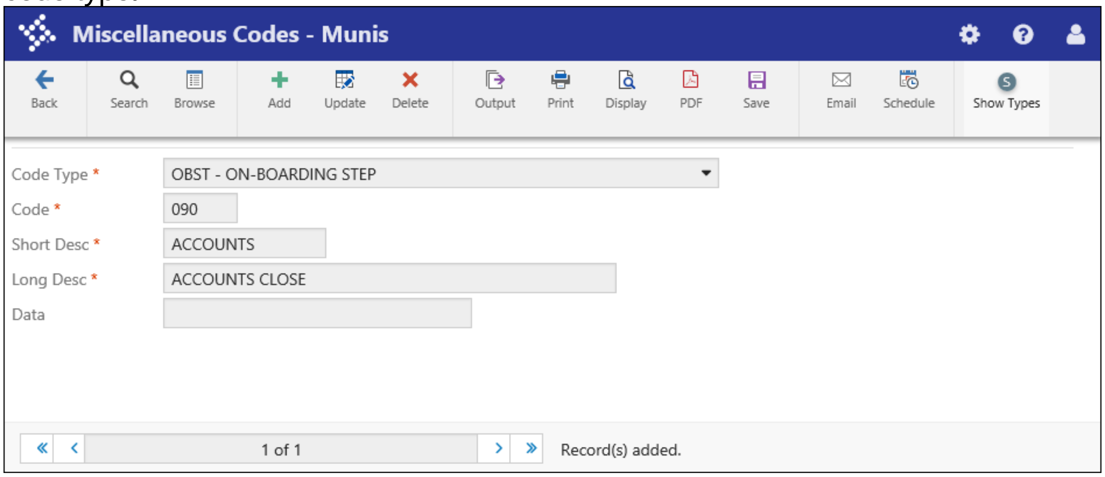
To create on-boarding steps:

1. Open the Payroll Miscellaneous Codes program.
   Human Capital Management > Human Resources >Personnel Setup > Payroll Miscellaneous Codes
   The program displays a list of available code types.



2. Select OBST—On-Boarding Step and click Accept.
   The program displays the Miscellaneous Codes program, with the OBST code as the selected

code type.



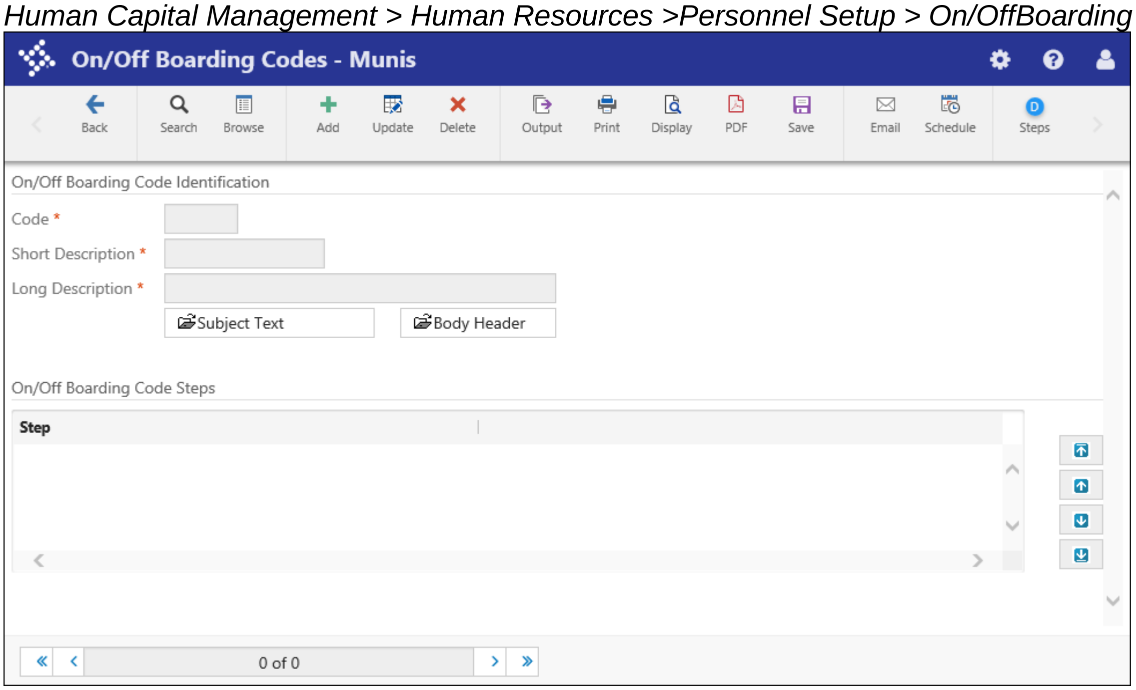
3. Click Add.
4. Enter the on/off boarding code. A code can contain up to four, alphanumeric characters.
5. Enter short (up to10-characters) and long (up to 30-characters) descriptions.
6. Click Accept.
7. Repeat the process for all the on-boarding steps required.

Creating On/Off Boarding Codes

On-boarding codes identify each individual/unique on-boarding process used by your organization. These codes contain the individual steps required to complete a process.

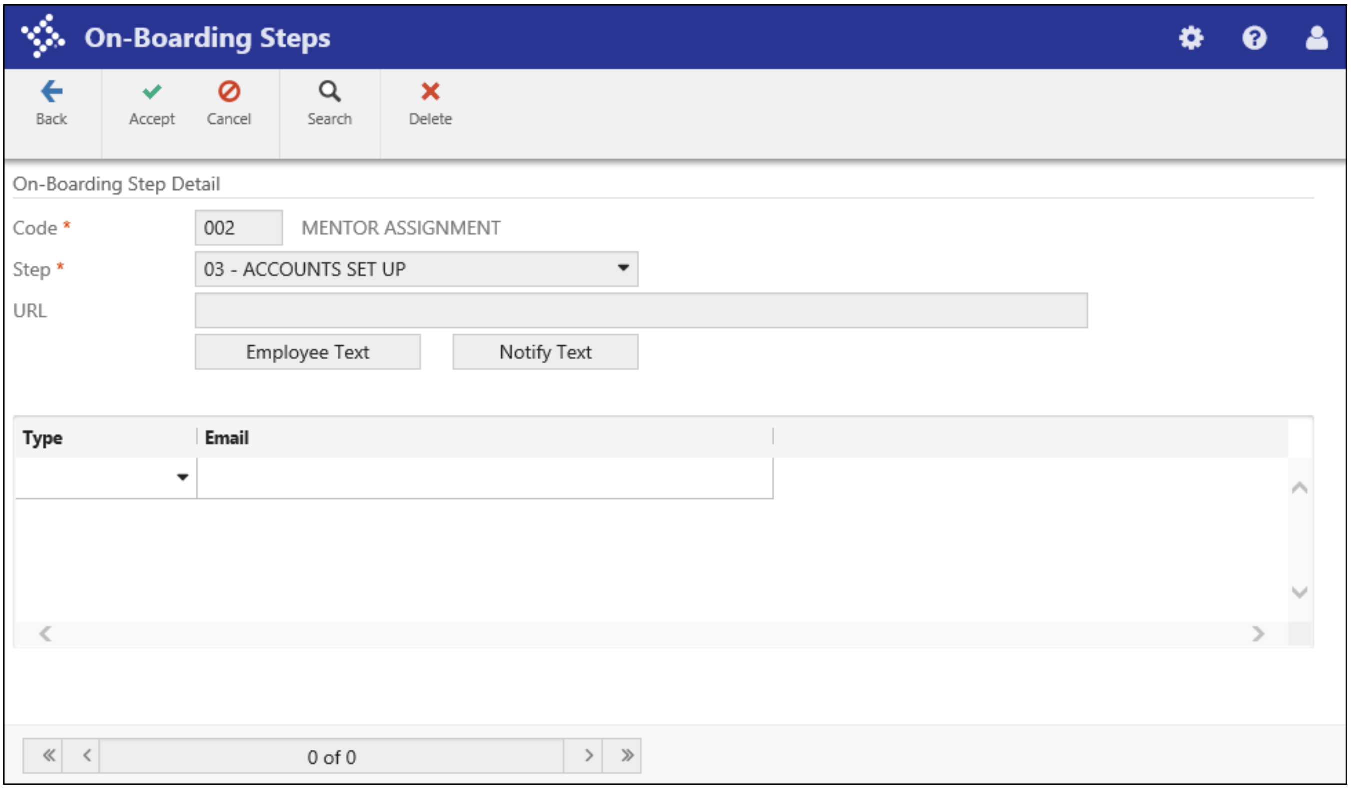
To create on-boarding codes:

1. Open the On-Boarding Codes program.
   Human Capital Management > Human Resources >Personnel Setup > On/OffBoarding Codes



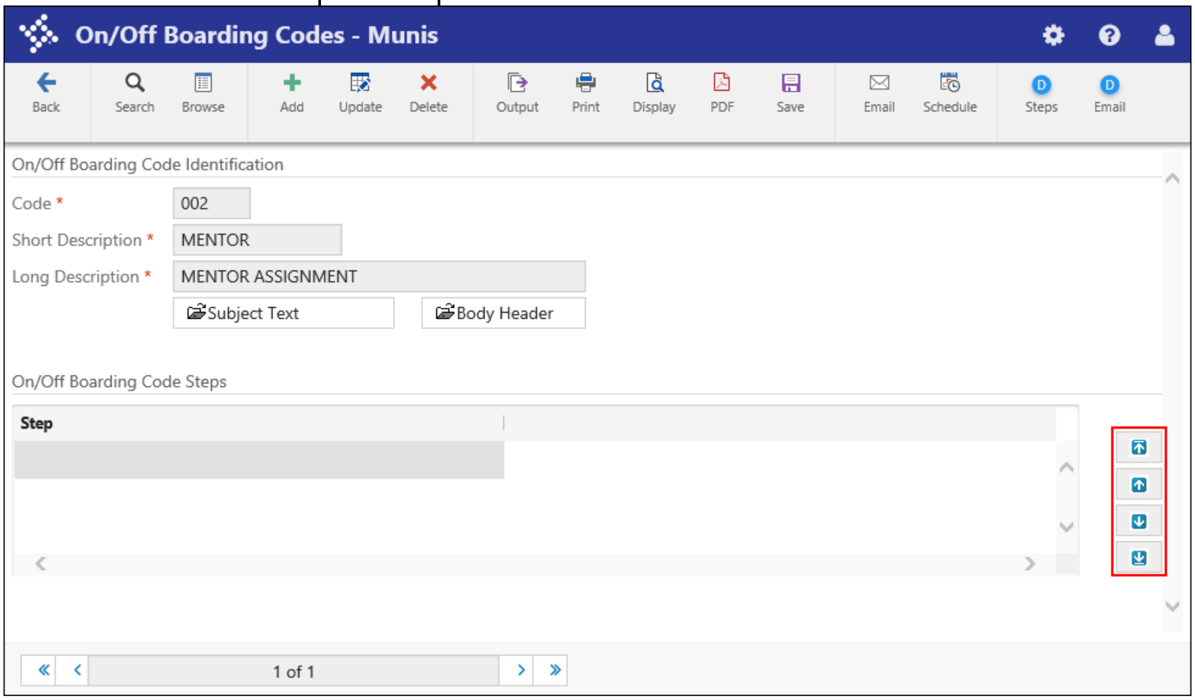
2. Click Add.

3. Enter a code value. Codes can contain up to four, alphanumeric characters.
4. Enter short (up to10-characters) and long (up to 30-characters) descriptions.
5. Click Accept.
6. Click Steps.
   The program makes the On-Boarding Steps screen available.
7. Click Add.
8. Select a step applicable to the selected on-boarding code.



9. If this step requires an Internet resource (for example, online resources for benefits), enter the URL for the address.
10. Use the Employee Text or Notify Text options to create the text for the email messages generated for this step.
11. To send an email to the employee's supervisor or another employee at this step, select Supervisor or Other from the Type list. If you select Supervisor, the program uses the email address maintained in the Employee Master program for the supervisor selected; if you select Other, you must enter the email address in the Email box.
12. Repeat the process to add all the required steps for the selected on-boarding process. Return to the main On/Off Boarding Codes screen.

13. Verify that the steps are in the correct sequential order. If not, click Update and use the arrow buttons on move the steps in the process.

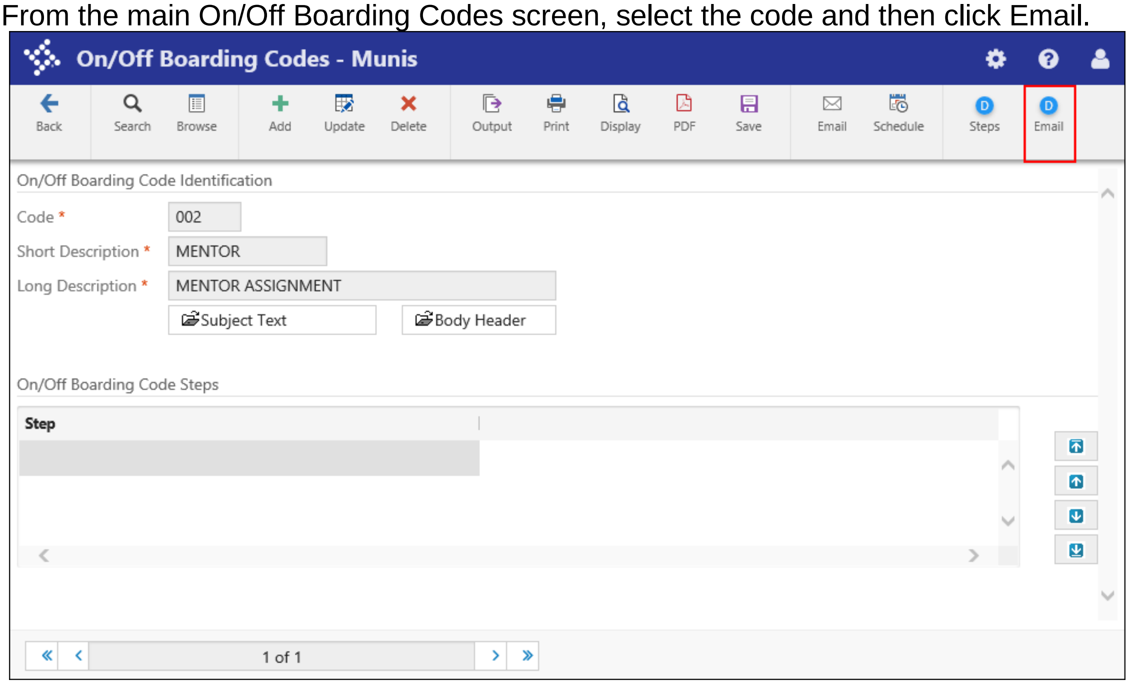


14. Click Accept to save the changes.

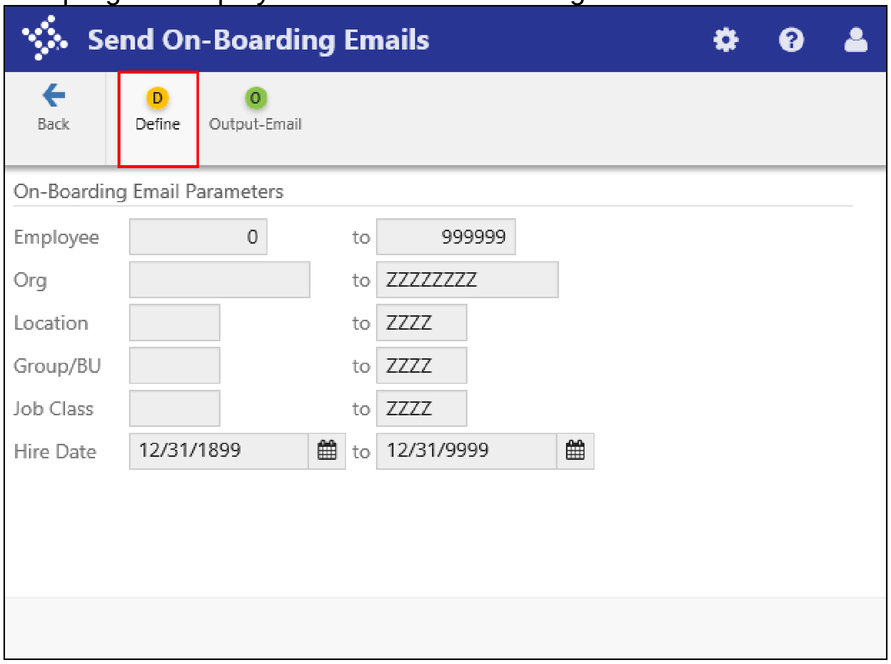
Sending an On/Off Boarding Email

To generate an email message:

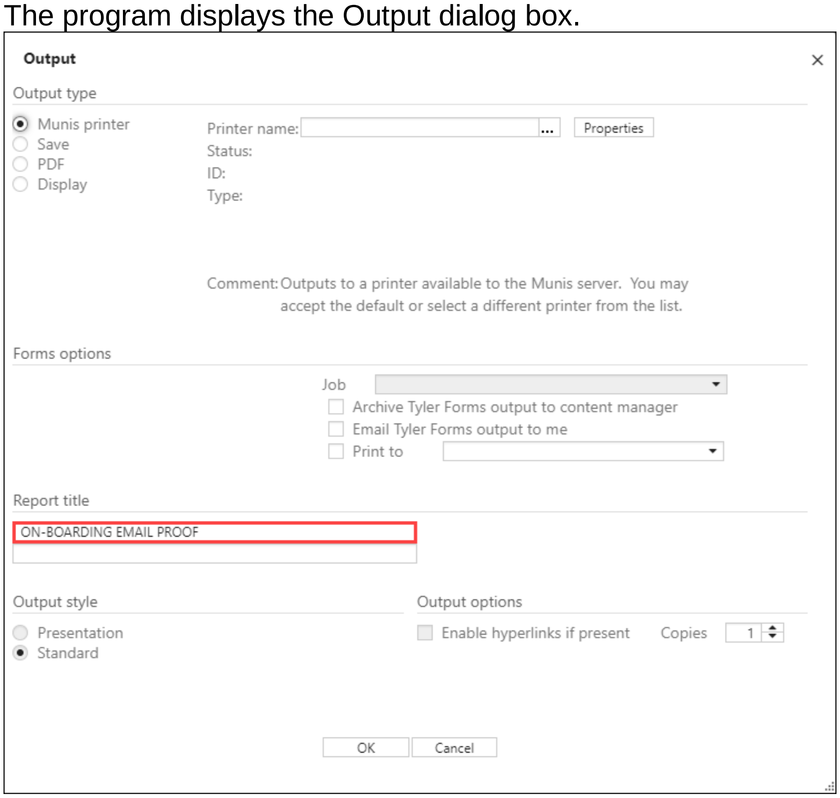
1. From the main On/Off Boarding Codes screen, select the code and then click Email.



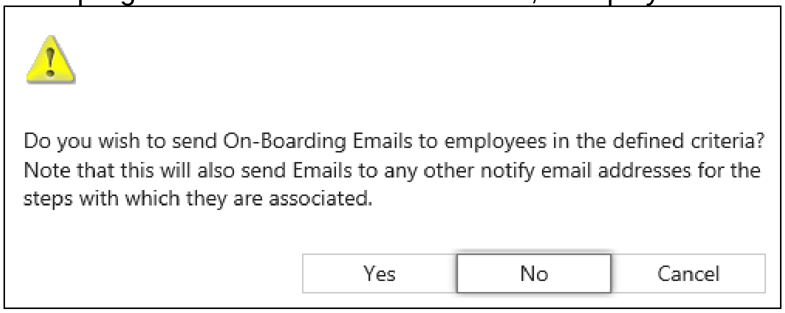
The program displays the Send On-Boarding Email screen.



2. Click Define.
3. Complete the fields to identify the employee or employees for whom to generate the email. To send the email to one employee, enter that employee number in each box. To send the email to all employees, accept the default values.
4. Click Accept.
5. Click Output Email.
The program displays the Output dialog box.



6. Select the output settings for a proof email and click OK.
   If the program does not encounter errors, it displays a confirmation message.



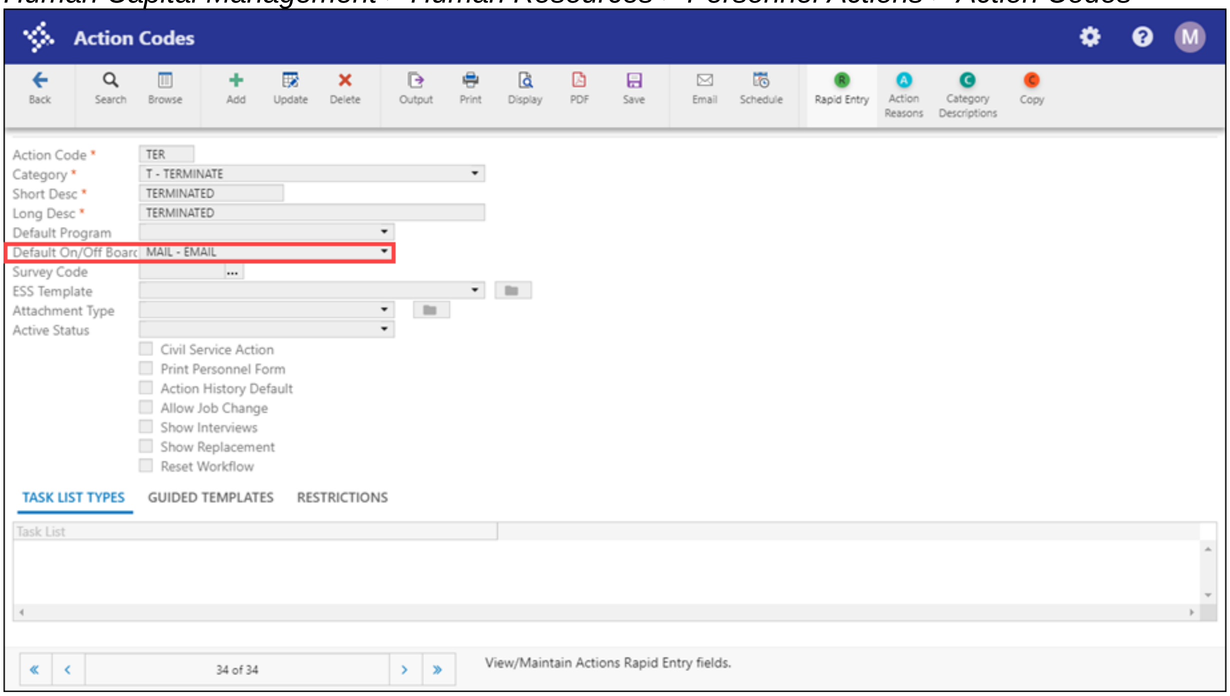
7. Review the proof.
8. If no changes are required, click Yes to distribute the emails; click No to cancel the process and make any necessary corrections.

Applying On/Off-Boarding Codes to Personnel Actions

On/off-boarding codes are assigned to personnel using the Action Codes program. Once assigned to an action code, the on/off-boarding code becomes the default value for that action; however, you can change this when you create a Personnel Action record.

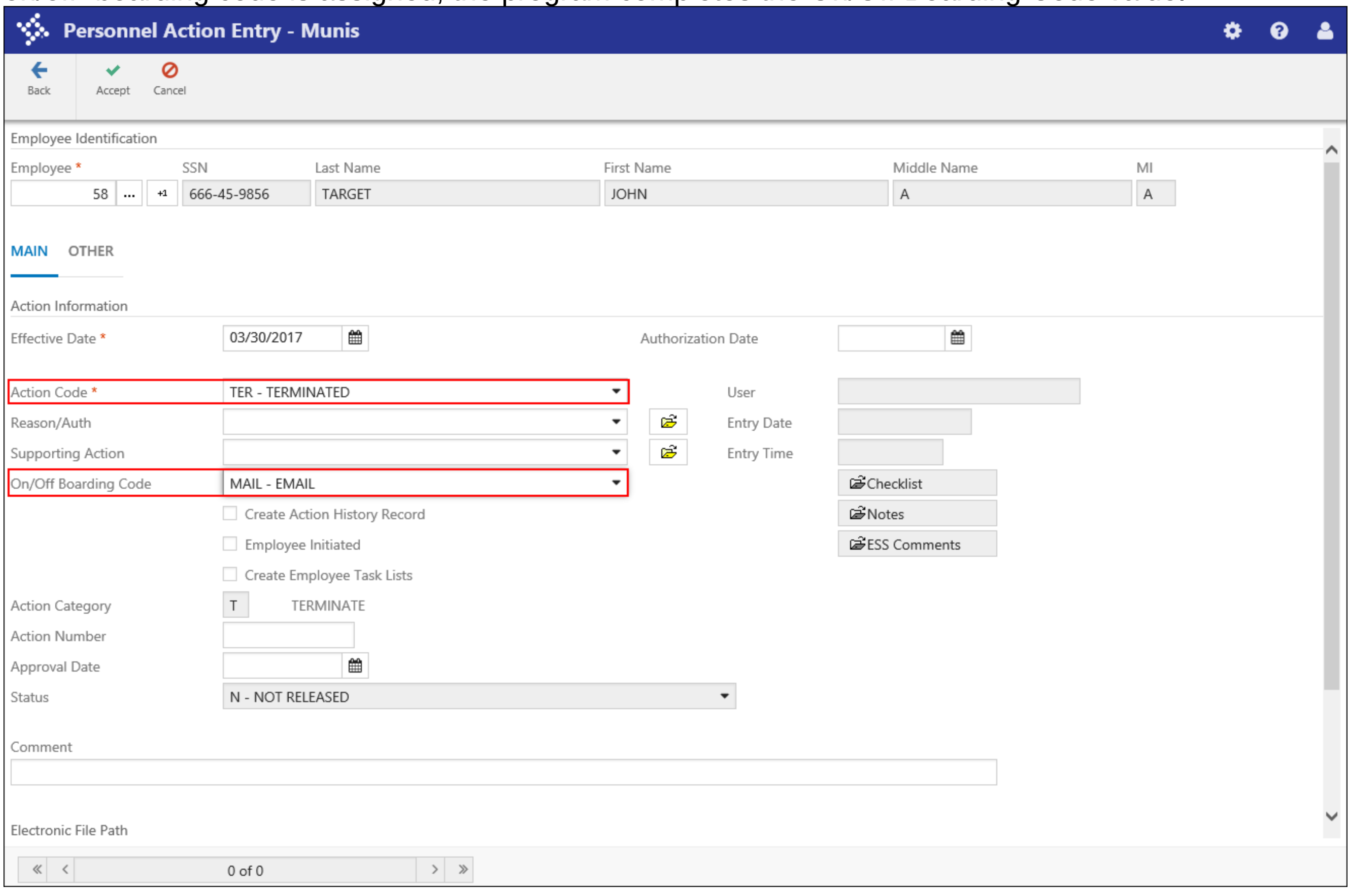
To assign on/off-boarding codes:

1. Open the Actions Codes program.
   Human Capital Management > Human Resources > Personnel Actions > Action Codes



2. Click Search, enter the action code to which you are assigning an on/off-boarding code, and click Accept.
3. Click Update.
4. Press Tab to move to the Default On/Off Board list.
   Select the on-board code.
5. Click Accept.
6. Repeat the process, as required, to assign on/off-boarding codes to action codes. When you create a new action in the Personnel Actions Entry program using an action code to which an

on/off -boarding code is assigned, the program completes the On/Off Boarding Code value.



When an action that includes an on/off boarding code is posted, email messages are distributed according to the On/Off Boarding Codes program settings.

Appendix C—Wildcard Characters

Wildcard characters are symbols you can type in boxes to refine your search criteria or to substitute for unknown values. You can include wildcard characters in boxes where you can type characters or numerals. You must include the correct capitalization in your search criteria. For example, if you type Smit*, records with the value SMITH are not found.

Symbol	Description
=	is null Use to find records that have a NULL in a field.
= or ==	equal to Use to find records that are equal to the value typed in the box. For example, typing =WI in the State box finds records where the value equals WI.
<	less than Use to find records with a value less than the data typed in the box. For example, typing <L finds data from A–K.
<=	less than or equal to Use to find records with a value less than or equal to the data typed in the box. For example, typing <=L finds data from A–L.
>	greater than Use to find records with a value greater than the data typed in the box. For example, typing >L finds data from M–Z.
>=	greater than or equal to Use to find records with a value greater than or equal to the data typed in the box. For example, typing >=L finds data from L–Z.
<> or !=	not equal Use to find records with values not equal to the data typed in the box. For example, typing <>1 finds all records where the value is not equal to 1.
<!	less than Use to find records that have a space in a field.
: or ..	range Use to find records based on data between and including two limiting characters. For example, typing A:C finds Alabama, Bermuda, California. Typing a:c finds account, barcode, customer.
|	or Use to find records with this value or that value. For example, typing Cash|Charge finds all records where the value equals Cash, if it exists, and all records where the value equals Charge, if it exists.
*	wildcard Use to find all records with the same sequential character string that begins, includes, or ends with an asterisk (*). For example, typing ARL* finds all records starting with ARL, such as ARLBERG, ARLINGTON, ARLON, and so on. Typing *H finds all records ending with H such as SMITH, WORTH, and so on.

Symbol	Description
?	single-character wildcard Use to finds all records with the same sequential character string where only a single-character differs. For example, typing A?C finds all records where the value equals ABC, ADC, ACC, AEC, and so on.
[c]	a set of characters Use to find all codes, as follows: Start with N or T: [NT]* Start in lowercase: [a-z]* Start in uppercase: [A-Z]* Use to find all two-character codes, as follows: Start in lowercase: [a-z]? Start in uppercase: [A-Z]?