

Simplifying Payroll with Effective Dated Pays

Munis – Human Capital Management - Payroll

CLASS DESCRIPTION

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

SESSION OVERVIEW

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

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PREREQUISITES

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

What are Effective Dated Pays?

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

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

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

Employee Job/Salary - Munis Munis 1

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global* Duplicate Print PDF Text file Excel Word Email Attach Notes Notify Maplink* Alerts* Text Global Add/Del Global Update Project Update Recalc Return

Confirm Search Actions Output Preview Office Tools Menu

Employee Identification

Employee	SSN	Last Name	First Name	MI	Suffix	Status
...

Main Cycles/Other Next Change Civil Service

Job Class ...

Summary Class ...

Pay Type ...

Work Start/End ... / ...

Position ...

Location ...

Group/BU ...

Status ...

Risk Code ...

Pay Freq ...

Start Date ...

End Date ...

Project String ...

Allocation ...

Account ...

Eff Date ...

Grade ...

Step ...

Calc Code ...

Hours/Day ...

Num Pays ...

Hours/Year ...

Days/Year ...

Days/Period ...

Sched Hours ...

Factor ...

Pay Basis ...

Remain ...

Compa-Ratio ...

Off-Step/Frozen ...

Pay Status ...

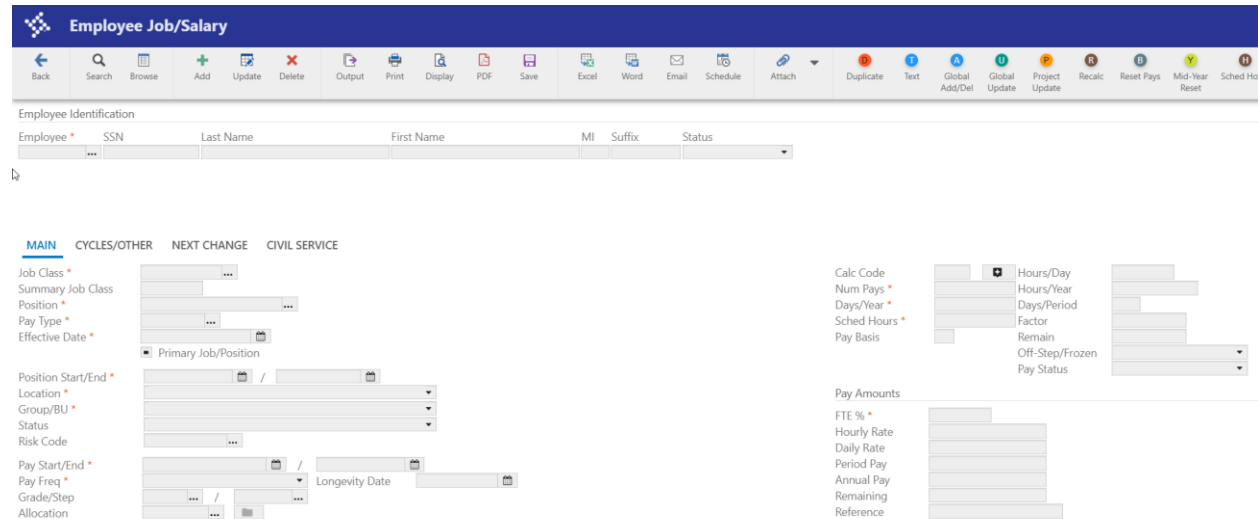
Pay Amounts

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

Mid-Cycle Amounts

Effective Date	Hourly Rate	Daily Rate	Period Pay	Hours/Day
...

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



Add, Update or Duplicate?

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

When to **Add** a new record

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

When to **Update** a pay record

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

When to **Duplicate** a pay record

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

Let's Talk Dates

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

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

Effective Date

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

Employee Job/Salary

Back

Search

Browse

Add

Update

Delete

Output

Print

Display

PDF

Sa

Employee Identification

Employee *	SSN	Last Name	First Name
62614 ...	987-93-7849	MOWRY	SERRA

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

Summary Job Class

Position *

Pay Type *

Effective Date *

☒ Primary Job/Position

Position Start/End *

Location *

Group/BU *

Status

Risk Code

Pay Start/End *

Pay Freq *

Grade/Step

Allocation

FRFI ...

FIRE

000022006 ...

FIREFIGHTER

111 ...

ANNUAL SALARY

01/01/2019 ...

to: 04/30/2019

01/01/2019 ...

/

12/31/9999 ...

220 - FIRE DEPARTMENT

18 - FIRE

FT - FULL TIME

4000 ...

PROTECTION/SERVICES

01/01/2019 ...

/

12/31/9999 ...

B - BIWEEKLY

FRFI ...

/

4 ...

FIREFIGHTER

0 ...

Allocation Detail

PA Type	Project String	T	Account
---------	----------------	---	---------

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

Position Start/ End

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

Employee Job/Salary

Back
 Search
 Browse
 Add
 Update
 Delete
 Output
 Print
 Display
 PDF
 Save

Employee Identification

Employee *	SSN	Last Name	First Name
62614	987-93-7849	MOWRY	SERRA

MAIN
CYCLES/OTHER
 NEXT CHANGE
 CIVIL SERVICE

Job Class * FRFI FIREFIGHTER
 Summary Job Class FR FIRE
 Position * 000022006 FIREFIGHTER
 Pay Type * 111 ANNUAL SALARY
 Effective Date * 01/01/2019 to: 04/30/2019
☒ Primary Job/Position

Position Start/End * 01/01/2019 / 12/31/9999
 Location * 220 - FIRE DEPARTMENT
 Group/BU * 18 - FIRE
 Status FT - FULL TIME
 Risk Code 4000 PROTECTION/SERVICES

Pay Start/End * 01/01/2019 / 12/31/9999
 Pay Freq * B - BIWEEKLY
 Grade/Step FRFI / 4 FIREFIGHTER
 Allocation 0

Allocation Detail

PA Type	Project String	T	Account
---------	----------------	---	---------

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

Pay Start/ End

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

Employee Job/Salary

Employee Identification

Employee *	SSN	Last Name	First Name
62614	987-93-7849	MOWRY	SERRA

MAIN
CYCLES/OTHER
NEXT CHANGE
CIVIL SERVICE

Job Class *
Summary Job Class
Position *
Pay Type *
Effective Date *
☒ Primary Job/Position

FRFI
FR
000022006
111
01/01/2019 to: 04/30/2019

FIREFIGHTER
FIRE
FIREFIGHTER
ANNUAL SALARY

Position Start/End *
Location *
Group/BU *
Status
Risk Code
Pay Start/End *
Pay Freq *
Grade/Step
Allocation

01/01/2019 / 12/31/9999
220 - FIRE DEPARTMENT
18 - FIRE
FT - FULL TIME
4000 PROTECTION/SERVICES
01/01/2019 / 12/31/9999
B - BIWEEKLY
FRFI / 4
0

FIREFIGHTER

Allocation Detail

PA Type	Project String	T	Account
---------	----------------	---	---------

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

Using Effective Dated Records

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

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

New Hire

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

Employee Job/Salary

Back

Accept

Cancel

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

686

089-04-9503

MOWRY

SERRA

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

FCL1

CLERK I

Summary Job Class

FD

FINANCE

Position *

13526

CLERK I

Pay Type *

111

ANNUAL SALARY

Effective Date *

01/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

135 - FINANCE DEPARTMENT

Group/BU *

10 - NON UNION

Status

FT - FULL TIME

Risk Code

5000

ADMINISTRATION SERVICES

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

CLR1

/

1

Allocation

0

Calc Code

11

Hours/Day

8.00

Num Pays *

26.000

Hours/Year

2080.00

Days/Year *

260.00

Days/Period

10

Sched Hours *

80.00

Factor

1.0000

Pay Basis

A

Remain

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Hourly Rate

13.4595

Daily Rate

107.6758

Period Pay

1,076.76

Annual Pay

27,995.71

Remaining

.00

Reference

27,995.71

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		11135000	5111		135		27995.71	80.00	100.000000

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

Pay Rate Change

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

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

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

Employee *
686

SSN
089-04-9503

Last Name
MOWRY

First Name
SERRA

MI
M

Suffix
A

Status
ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *
FCL1
CLERK I

Summary Job Class
FD
FINANCE

Position *
13526
CLERK I

Pay Type *
111
ANNUAL SALARY

Effective Date *
01/01/2020
to: 01/31/2020
☒ Primary Job/Position

Position Start/End *
01/01/2020 / 12/31/9999

Location *
135 - FINANCE DEPARTMENT

Group/BU *
10 - NON UNION

Status
FT - FULL TIME

Risk Code
5000
ADMINISTRATION SERVICES

Pay Start/End *
01/01/2020 / 12/31/9999

Pay Freq *
B - BIWEEKLY

Grade/Step
CLR1 / 1
CLERK I

Allocation
0

Calc Code
11
Hours/Day
8.00

Num Pays *
26.000
Hours/Year
2080.00

Days/Year *
260.00
Days/Period
10

Sched Hours *
80.00
Factor
1.0000

Pay Basis
A
Remain
26.000
Off-Step/Frozen
N - No
Pay Status
A - ACTIVE

Pay Amounts

FTE % *
1.0000

Hourly Rate
13.4595

Daily Rate
107.6758

Period Pay
1,076.76

Annual Pay
27,995.71

Remaining
.00

Reference
27,995.71

Recurring Pay

13.4595

107.6758

1,076.76

27,995.71

27,995.71

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		11135000	5111		135	<input type="checkbox"/>	27995.71	80.00	100.000000

GL Change

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

9

Employee *SSNLast NameFirst NameMISuffixStatus

686089-04-9503MOWRYSERRAA - ACTIVE

MAINCYCLES/OTHERNEXT CHANGECIVIL SERVICE

Job Class *FCL1CLERK I

Summary Job ClassFDFINANCE

Position *13526CLERK I

Pay Type *111ANNUAL SALARY

Effective Date *01/01/2020to: 01/31/2020

☒ Primary Job/Position

Position Start/End *01/01/2020/12/31/9999

Location *135 - FINANCE DEPARTMENT

Group/BU *10 - NON UNION

StatusFT - FULL TIME

Risk Code5000ADMINISTRATION SERVICES

Pay Start/End *01/01/2020/12/31/9999

Pay Freq *B - BIWEEKLY

Grade/StepCLR1/1CLERK I

Allocation0

Calc Code11Hours/Day8.00

Num Pays *26.000Hours/Year2080.00

Days/Year *260.00Days/Period10

Sched Hours *80.00Factor1.0000

Pay BasisARemain26.000

Off-Step/FrozenN - No

Pay StatusA - ACTIVE

Pay Amounts

FTE % *	1.0000	Recurring Pay
Hourly Rate	13.4595	13.4595
Daily Rate	107.6758	107.6758
Period Pay	1,076.76	1,076.76
Annual Pay	27,995.71	27,995.71
Remaining	.00	
Reference	27,995.71	

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		11135000	5111		135	<input type="checkbox"/>	27995.71	80.00	100.000000

GL Change

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

9

GL Change

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

9

GL Change

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

9

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

Employee Job/Salary

Back
Accept
Cancel

Employee Identification

Employee *	SSN	Last Name	First Name	MI	Suffix	Status
701	654-98-7364	MCKNIGHT	AJ			A - ACTIVE

MAIN

Job Class *

SUPR

PARKS AND REC SUPERVISOR

Summary Job Class

PR

PRKS RECRE

Position *

17701

PARK SUPERVISOR

Pay Type *

111

ANNUAL SALARY

Effective Date *

03/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

177 - PARKS AND RECREATION DEPART

Group/BU *

10 - NON UNION

Status

FT - FULL TIME

Risk Code

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

PSP

/

1

PARK SUPERVISOR

Allocation

1050

STREET LIGHT PROJECT

Calc Code

11

Hours/Day

8.00

Num Pays *

26.000

Hours/Year

2080.00

Days/Year *

260.00

Days/Period

10

Sched Hours *

80.00

Factor

1.0000

Pay Basis

A

Remain

26.000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *	Hourly Rate	Daily Rate	Period Pay	Annual Pay	Remaining	Reference
1.0000	21.6313	173.0504	1,730.50	44,993.11	.00	44,993.11

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		14172255	5110	1050	177		22496.55	40.00	50.000000
		11C6	5110	1050	177		22496.56	40.00	50.000000

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

Retro Pay Change

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

Employee Job/Salary

Back

Search

Browse

+

Add

Update

Delete

Output

Print

Display

PDF

Save

Excel

Word

Email

Schedule

Attach

Duplicate

Test

Global Add/Del

Global Update

Project Update

Recalc

Reset Pays

Mid-Year Reset

Sched Hour

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

702

654-93-4321

JONES

RODGER

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

S291

PSYCHOLOGIST

Summary Job Class

COUN

COUNSELOR

Position *

92369

PSYCHOLOGIST

Pay Type *

111

ANNUAL SALARY

Effective Date *

01/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

9900 - ELEMENTARY SCHOOL 5

Group/BU *

9200 - TEACHERS

Status

FT - FULL TIME

Risk Code

2000

PROFESSIONALS

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

A

/

1

BA

Allocation

0

Calc Code

32

Hours/Day

7.00

Num Pays *

26.000

Hours/Year

1295.00

Days/Year *

185.00

Days/Period

0

Sched Hours *

0.00

Factor

1.0000

Pay Basis

A

Remain

26.000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Recurring Pay

Hourly Rate

21.4170

21.4170

Daily Rate

149.9189

149.9189

Period Pay

1,066.73

1,066.73

Annual Pay

27,735.00

27,735.00

Remaining

.00

Reference

27,735.00

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		99000001	7013		9900	<input type="checkbox"/>	27735.00	0.00	100.000000

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

Employee Job/Salary

Back

Accept

Cancel

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

702

654-93-4321

JONES

RODGER

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

S291

PSYCHOLOGIST

Summary Job Class

COUN

COUNSELOR

Position *

92369

PSYCHOLOGIST

Pay Type *

111

ANNUAL SALARY

Effective Date *

02/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

9900 - ELEMENTARY SCHOOL 5

Group/BU *

9200 - TEACHERS

Status

FT - FULL TIME

Risk Code

2000

PROFESSIONALS

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

A

/

2

BA

Allocation

0

Calc Code

32

Hours/Day

7.00

Num Pays *

26.000

Hours/Year

1295.00

Days/Year *

185.00

Days/Period

0

Sched Hours *

0.00

Factor

1.0000

Pay Basis

A

Remain

26.000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Recurring Pay

Hourly Rate

21.4170

21.4170

Daily Rate

149.9189

149.9189

Period Pay

1,066.73

1,066.73

Annual Pay

27,735.00

27,735.00

Remaining

.00

Reference

27,735.00

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		99000001	7013		9900	<input type="checkbox"/>	27735.00	0.00	100.000000

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

Munis (Prempay)



The changes that you are making overlap with a payroll that includes this employee. If you proceed, you will cause retroactive pay to calculate. Do you want to continue?

Cancel

Continue

Export Payroll Details

Payroll	Payroll Warr	Start Date	End Date	Check Date	Complete?
1	020220	02/02/2020	02/14/2020	02/14/2020	Yes

Pay End

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

Employee Job/Salary

Back

Accept

Cancel

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

686

089-04-9503

MOWRY

SERRA

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

FCL1

CLERK I

Summary Job Class

FD

FINANCE

Position *

13526

CLERK I

Pay Type *

111

ANNUAL SALARY

Effective Date *

02/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

02/29/2020

Location *

135 - FINANCE DEPARTMENT

Group/BU *

10 - NON UNION

Status

FT - FULL TIME

Risk Code

5000

ADMINISTRATION SERVICES

Pay Start/End *

01/01/2020

/

02/29/2020

Pay Freq *

B - BIWEEKLY

Grade/Step

CLR1

/

2

CLERK I

Allocation

0

Calc Code

11

Hours/Day

8.00

Num Pays *

26.000

Hours/Year

2080.00

Days/Year *

260.00

Days/Period

10

Sched Hours *

80.00

Factor

1.0000

Pay Basis

A

Remain

26.000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Recurring Pay

Hourly Rate

13.8200

13.8200

Daily Rate

110.5600

110.5600

Period Pay

1,105.60

1,105.60

Annual Pay

28,745.60

28,745.60

Remaining

.00

Reference

28,745.60

Allocation Detail

PA Type

Project String

Org

Object

Project

Loc

Grant

Amount

Hours

Percent

11135000

5111

135

28745.60

80.00

100.000000

Position Change

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

Employee Job/Salary

Back

Search

Browse

Add

Update

Delete

Output

Print

Display

PDF

Save

Excel

Word

Email

Schedule

Attach

Duplicate

Text

Global Add/Del

Global Update

Project Update

Recalc

Reset Pays

Mid-Year Reset

Sched Hc

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

700

321-65-7894

VALORE

CHERYL

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

S220

TEACHER ELEMENTARY SCHOOL

Summary Job Class

TCHR

TEACHER

Position *

92319

TEACHER ES 2

Pay Type *

111

ANNUAL SALARY

Effective Date *

01/01/2020

to: 12/31/9999

Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

9600 - ELEMENTARY SCHOOL 2

Group/BU *

9200 - TEACHERS

Status

FT - FULL TIME

Risk Code

2000

PROFESSIONALS

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

A

/

2

BA

Allocation

0

Calc Code

32

Hours/Day

7.00

Num Pays *

26,000

Hours/Year

1295.00

Days/Year *

185.00

Days/Period

0

Sched Hours *

0.00

Factor

1.0000

Pay Basis

A

Remain

26,000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Recurring Pay

Hourly Rate

23,201.7

23,201.7

Daily Rate

162,412.2

162,412.2

Period Pay

1,155.63

1,155.63

Annual Pay

30,046.25

30,046.25

Remaining

.00

Reference

30,046.25

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		96011101	7005		9600		30046.25	0.00	100.000000

1 of 5

<

>

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

Employee Job/Salary

Back

Accept

Cancel

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

700

321-65-7894

VALORE

CHERYL

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

S220

TEACHER ELEMENTARY SCHOOL

Summary Job Class

TCHR

TEACHER

Position *

92329

TEACHER ES 3

Pay Type *

111

ANNUAL SALARY

Effective Date *

03/01/2020

to: 12/31/9999

☒ Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

9700 - ELEMENTARY SCHOOL 3

Group/BU *

9200 - TEACHERS

Status

FT - FULL TIME

Risk Code

2000

PROFESSIONALS

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

A

/

4

BA

Allocation

0

Calc Code

32

☒ Hours/Day

7.00

Num Pays *

26.000

Hours/Year

1295.00

Days/Year *

185.00

Days/Period

0

Sched Hours *

0.00

Factor

1.0000

Pay Basis

A

Remain

26.000

Off-Step/Frozen

N - No

Pay Status

A - ACTIVE

Pay Amounts

FTE % *

1.0000

Recurring Pay

Hourly Rate

23.2017

23.2017

Daily Rate

162.4122

162.4122

Period Pay

1,155.63

1,155.63

Annual Pay

30,046.25

30,046.25

Remaining

.00

Reference

30,046.25

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		97011101	7005		9700	<input type="checkbox"/>	30046.25	0.00	100.000000

1 of 5

<

>

Enter employee's position code

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

Employee Job/Salary

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

700

321-65-7894

VALORE

CHERYL

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

S220

TEACHER ELEMENTARY SCHOOL

Summary Job Class

TCHR

TEACHER

Calc Code

32

Hours/Day

7.00

Position *

92329

TEACHER ES 3

Num Pays *

26.000

Hours/Year

1295.00

Pay Type *

111

ANNUAL SALARY

Days/Year *

185.00

Days/Period

0

Effective Date *

03/01/2020

to: 12/31/9999

Primary Job/Position

Position Start/End *

01/01/2020

/

12/31/9999

Location *

9700 - ELEMENTARY SCHOOL 3

Group/BU *

9200 - TEACHERS

Status

FT - FULL TIME

Risk Code

2000

PROFESSIONALS

Pay Start/End *

01/01/2020

/

12/31/9999

Pay Freq *

B - BIWEEKLY

Grade/Step

A

/

4

BA

Allocation

0

Remaining

Reference

30,046.25

Duplicating Primary Pay To New Job/Position

You are duplicating a base pay marked as primary to a different job/position combination. If you want to keep the pay flagged as primary, the most recent pays as of the new effective date using the old job/position will automatically be end-dated to avoid having overlapping pays marked as primary for different job/position combinations.

If you wish to continue, choose 'Yes'; otherwise, choose 'No' to edit the record.

Yes

No

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		97011101	7005		9700		30046.25	0.00	100.000000

1 of 3

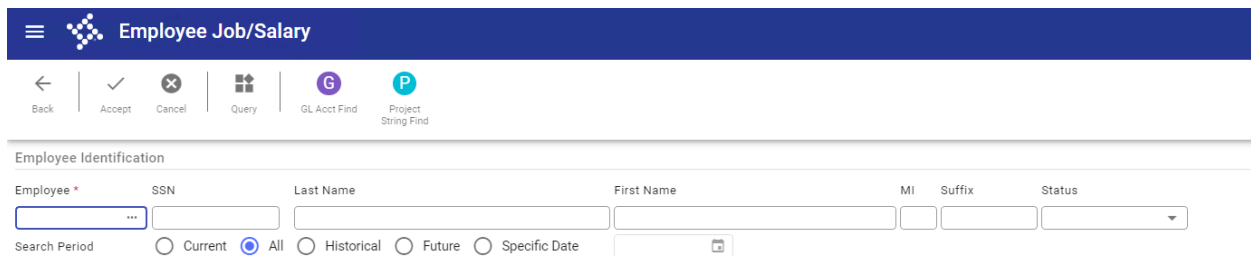
<

>

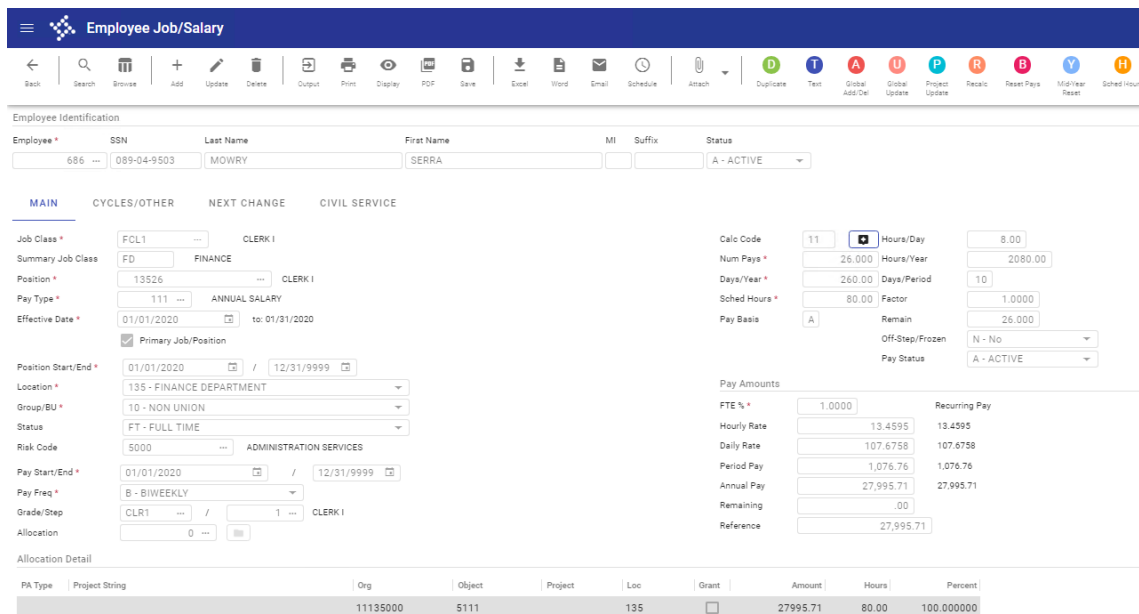
Searching Pay History

One of the biggest impacts of using Effective Dated records is how history displays. From Employee Job/Salary, when searching for a pay record you'll now notice a Search Period where you can select Current, All, Historical, Future, or Specific Date. With this added functionality, pays can be searched by history (within Munis), at a specific point in time, or any future dated pays based on the Effective Date.

NOTE: When searching if you do not see a record you are looking for, check the search period selected (I.E. All may show too much, Current may not show a pay code that ended last week).



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



PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		11135000	5111		135		27995.71	80.00	100.000000

Employee Job/Salary

Back

Search

Review

Add

Update

Delete

Output

Print

Display

PDF

Save

Excel

Word

Email

Schedule

Attach

Duplicate

Test

Global Add Del

Global Update

Project Update

Recalc

Rever Pays

Mid-Year Reset

Sched Hours

View

Employee Identification

Employee *

SSN

Last Name

First Name

MI

Suffix

Status

686

089-04-9503

MOWRY

SERRA

A - ACTIVE

MAIN

CYCLES/OTHER

NEXT CHANGE

CIVIL SERVICE

Job Class *

Summary Job Class

Position *

Pay Type *

Effective Date *

Position Start/End *

Location *

Group/BU *

Status

Risk Code

Pay Start/End *

Pay Freq *

Grade/Step

Allocation

FCL1

CLERK I

FD

FINANCE

13526

CLERK I

111

ANNUAL SALARY

02/01/2020

to: 12/31/9999

01/01/2020

12/31/9999

135 - FINANCE DEPARTMENT

10 - NON UNION

FT - FULL TIME

5000

ADMINISTRATION SERVICES

01/01/2020

12/31/9999

8 - BIWEEKLY

CLR1

2

CLERK I

0

Cele Code

Num Pays *

Days/Year *

Sched Hours *

Pay Basis

Off-Step/Frozen

Pay Status

Hours/Day

Hours/Year

Days/Period

Factor

Remain

N - No

A - ACTIVE

11

26.000

260.00

80.00

A

Pay Amounts

FTE % *

Hourly Rate

Daily Rate

Period Pay

Annual Pay

Remaining

Reference

Recurring Pay

1.0000

13.8200

110.5600

1,105.60

28,745.60

.00

28,745.60

13.8200

110.5600

1,105.60

28,745.60

Allocation Detail

PA Type	Project String	Org	Object	Project	Loc	Grant	Amount	Hours	Percent
		11135000	5111		135		28745.60	80.00	100.000000

Conclusion

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