

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.

Table of Contents

Class description1
Session Overview1
Table of Contents1
Prerequisites
What are Effective Dated Pays?2
Add,Update or Duplicate?3
Let's Talk Dates4
Effective Date4
Position Start/ End5
Pay Start/ End5
Using Effective Dated Records
New Hire6
Pay Rate Change7
GL Change9
Retro Pay Change
Pay End13
Position Change14
Searching Pay History17
Conclusion





PREREQUISITES

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

What are Effective Dated Pays?

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

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

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





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

% -	Employ	/ee Job	/Salar	y																					
E Back	Q Search	Browse	+ Add	Update	X Delete	Dutput	🖶 Print	Display	PDF	E Save	Excel	Word	🖂 Email	Schedule	Attach	•	Duplicate	Text	(Global Add/Del	U Global Update	Project Update	Recalc	B Reset Pays	Y Mid-Year Reset	B Sched Ho
Employee	Identificati	on																							
Employee	SSN	I	Last	Name			First	Name			MI	Suffix		atus	•										
2																									
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Pay Start/E Pay Freq * Grade/Step Allocation			/		/	ongevity D	late	1	t	5						Pi A Ri	eriod Pay nnual Pay emaining eference								

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.

🔆 Employe	e Job/Salaı	у						
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Back Search B	rowse Add	Update	Delete	Output	Print	Display	PDF	Sa
Employee Identification								_
Employee * SSN	Las	t Name			First	Name		
62614 987-93	3-7849 M	OWRY			SERF	RA		
MAIN CYCLES/OTH		IANGE	CIVIL SER\					
Job Class *	FRFI		FIREFIGH	TER				
Summary Job Class Position *	FR 000022006	FIRE	FI	REFIGHTER				
Pay Type *	111		JAL SALAR					
Effective Date *	01/01/2019							
Encoure bate	 Primary Job 			0,2015				
Position Start/End *	01/01/2019	(12/31/99	99 🛍	1			
Location *	220 - FIRE DEPA	RTMENT				•		
Group/BU *	18 - FIRE					-		
Status	FT - FULL TIME					-		
Risk Code	4000	PR	OTECTION	/SERVICES				
Pay Start/End *	01/01/2019		m /	12/31/9999	Ĩ	1		
Pay Freq *	B - BIWEEKLY		•					
Grade/Step	FRFI	4	F	FIREFIGHTER	R			
Allocation	0		2					
Allocation Detail			-					
PA Type Project String					ccount			

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.

🔅 Employe	e Job/Salary
• •	III + III × III C IIII C III C IIII C III
Employee Identification	
Employee * SSN 62614 987-93 MAIN CYCLES/OTH	
Job Class * Summary Job Class Position * Pay Type * Effective Date *	FRFI FIREFIGHTER FR FIRE 000022006 FIREFIGHTER 111 ANNUAL SALARY 01/01/2019 Image: to: 04/30/2019 Image: Primary Job/Position Firefighter
Position Start/End * Location * Group/BU * Status Risk Code	01/01/2019 (1/2/31/9999) (1/2/31/999) (1/2/31/99) (1/2/31/9) (1/2/31/9) (1/2/31/9) (1/2/31
Pay Start/End * Pay Freq * Grade/Step Allocation	01/01/2019 (# / 12/31/9999 (#) B - BIWEEKLY FRFI / 4 FIREFIGHTER 0 C
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.



Semployee	e Job/Salary	/					
	i Add	Update Delete	Cutput	🖶 Print	Display	DF	E Sa
Employee Identification							
Employee * SSN 62614 987-93 MAIN CYCLES/OTH	-7849 MO	Name WRY NGE CIVIL SERV	/ICE	First N SERR			
Job Class * Summary Job Class Position * Pay Type * Effective Date *		ANNUAL SALAR	REFIGHTER Y				
Position Start/End * Location * Group/BU * Status Risk Code	01/01/2019 220 - FIRE DEPAR 18 - FIRE FT - FULL TIME 4000	/ 12/31/99 TMENT PROTECTION)	• •		
Pay Start/End * Pay Freq * Grade/Step Allocation	01/01/2019 B - BIWEEKLY FRFI / 0	4	12/31/9999 FIREFIGHTEF	2			
Allocation Detail							
PA Type Project String			TA	ccount			

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

Using Effective Dated Records

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

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

New Hire

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



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

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

Pay Rate Change

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

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mployee Identificati	on																	
mployee *	SSN Last Name		First Name		м	I Suffix	Status											
686	089-04-9503 MOWRY		SERRA				A - ACT	IVE 👻										
ob Class * ummary Job Class	FCL1 ··· CLERK I FD FINANCE								Calc Code Num Pays *	11	р н			8.00				
osition *	13526 CLERK I								Days/Year *		260.00 Da		- 6	2080.0				
Pay Type *	111 ··· ANNUAL SALARY								Sched Hours *		80.00 Fa	ector		1.0000				
Effective Date *	01/01/2020 🖬 to: 12/31/9999								Pay Basis	A	Re	main		26.000				
	Primary Job/Position										01	1-Step/Froze		I - No	v			
Position Start/End *	01/01/2020 🖬 / 12/31/9999										Pa	ry Status	A	- ACTIVE	Ŧ			
ocation *	135 - FINANCE DEPARTMENT	Ŧ							Pay Amounts									
iroup/BU *	10 - NON UNION	Ŧ							FTE % *	1.000			becurring P	Pay				
tatus	FT - FULL TIME	Ŧ							Hourly Rate		13.4		13.4595					
lisk Code	5000 ADMINISTRATION SE	RVICES							Daily Rate		107.6		107.6758					
Pay Start/End *		31/9999 🖬							Period Pay Annual Pay		27,99		27,995.71					
	B - BIWEEKLY -								Remaining			.00						
	CLR1 - / 1 CLEF	0.1							Reference		27	,995.71						
irade/Step																		
irade/Step illocation																		
Pay Freq * Brade/Step Allocation Allocation Detail PA Type Project SI		Org	Obje	ct Pr	roject	Loc	Grant	Amount	Hours	Perc	cent							

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

= 🐝 Emp	oloyee Job/Salary							
Eack Accept	Cancel							
Employee Identificatio	n							
Employee * S	SSN Last Name	First Name	MI	Suffix	Status			
686	089-04-9503 MOWRY	SERRA			A - ACTIVE	Ŧ		
MAIN CYC	CLES/OTHER NEXT CHANGE CIVIL SERVICE							
Job Class *	FCL1 ··· CLERK I				Calc Code	11 Hours/Day	8.00	
Summary Job Class	FD FINANCE	1 and			Num Pays *	26.000 Hours/Year	2080.00	
Position *	13526 ··· CLERK I				Days/Year *	260.00 Days/Period	10	
Pay Type *	111 ANNUAL SALARY				Sched Hours *	80.00 Factor	1.0000	
Effective Date *	02/01/2020 to: 12/31/9999				Pay Basis	A Remain	26.000	
	Primary Job/Position					Off-Step/Froze	n N-No 🐨	
Position Start/End *	01/01/2020					Pay Status	A - ACTIVE 👻	
Location *	135 - FINANCE DEPARTMENT	*			Pay Amounts			
Group/BU *	10 - NON UNION	-			FTE % *	1.0000 R	ecurring Pay	
Status	FT - FULL TIME	*			Hourly Rate	13.4595 1	3.4595	
Risk Code	5000 ··· ADMINISTRATION SERVICES				Daily Rate	107.6758 1	07.6758	
Pay Start/End *	01/01/2020 12/31/9999	1			Period Pay	1,076.76 1	,076.76	
Pay Freq *	B - BIWEEKLY -	_			Annual Pay		27,995.71	
Grade/Step	CLR1 / 2 CLERK I				Remaining	.00		
Allocation	0)				Reference	27,995.71		
Allocation Detail								
PA Type Project Str	ring Org	Object Project		Loc	Grant	Amount Hours	Percent	
-] [11135	000 5111		135	279	95.71 80.00 100.0	00000	

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



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

= 🔆	Employee Job/Salar	у											
	cept Cancel Query	GL Acct Find Project String Fin	nd										
Employee Ident	ification												
Employee *	SSN L	.ast Name			First Nar	ne			MI Sut	fix	Sta	tus	
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Search Period	Current O All (Historical	Future 🔿 S	Specific Date									
😑 🏑 Emp	loyee Job/Salary												
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	ISN Last Name 089-04-9503 MOWRY	First N		N	MI Suffix	Status A - ACTIVE	Ŧ						
MAIN CYC	LES/OTHER NEXT CHANGE	CIVIL SERVICE											
Job Class *	FCL1 ···· CLERK I							Calc Code		Hours/Day		8.00	
Summary Job Class	FD FINANCE 13526 CLEI	DV I						Num Pays * Days/Year *		00 Hours/Year		2080.0	
Pay Type *	13520 CLE	**** *						Sched Hours *		00 Days/Perior	~	1.0000	
Effective Date *	01/01/2020 🖬 to: 01/31/2	020						Pay Basis	A	Remain		26.000	
	Primary Job/Position									Off-Step/Fr	ozen	N - No	-
Position Start/End *	01/01/2020 🖬 / 12/31/	/9999 🖬								Pay Status		A - ACTIVE	Ψ.
Location *	135 - FINANCE DEPARTMENT	Ψ.						Pay Amounts					
Group/BU *	10 - NON UNION	Ψ						FTE % *	1.0000	10.4505	Recurrin		
Status Risk Code	FT - FULL TIME 5000 ···· ADMINISTRAT	TON SERVICES						Hourly Rate Daily Rate		13.4595 107.6758	13.459		
	01/01/2020 I	12/31/9999 D						Period Pay		1,076.76	1,076.7		
Pay Start/End * Pay Freq *	B - BIWEEKLY	12/31/9999						Annual Pay		27,995.71	27,995	71	
Grade/Step	CLR1 / 1	CLERK I						Remaining		.00			
Allocation	0							Reference		27,995.71			
Allocation Detail													
PA Type Project Str	ing	Org	Object	Project	Loc	Grant	Amount	Hours	Percent				
		11135000	5111		135		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.



= 🐝 Empl	loyee Job/Sa	alary																			
	Add	Update	Delete	Output	Print .	O Display	PDF Se	-	Lixcel Word	Email	C) Schedule	0 Attach	Duplie	-	Global Add/Del	Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	
mployee Identification	n		_																		
nployee * S	SN	Last Nar	me			Fir	st Name			М	Suffix	Statu	18								
701	654-98-7364	MCKN	NIGHT			A	J					A -	ACTIVE	-							
MAIN CYCL	LES/OTHER	NEXT	CHANGE PARKS AND		VIL SER	VICE							alc Code	11		Hours/D			8.00		
ummary Job Class		PRKS RECE		D NEG SOF	ERVISOR								um Pays *	11		Hours/Y			2080.00		
osition *	17701			ARK SUPER	VISOR								ays/Year *			Days/Pe		10	2000.00		
ay Type *	111	ANNU	AL SALARY										ched Hours			Factor			1.0000		
ffective Date *	01/01/2020		to: 12/31	1/9999								P	ay Basis	A		Remain			26.000		
	Primary Job/F	osition														Off-Step	/Frozen	N - N	lo	~	,
osition Start/End *	01/01/2020			/31/9999												Pay Stat	us	A - A	CTIVE	-	-
ocation *	177 - PARKS A					-						P	ay Amount	s							
oup/BU *	10 - NON UNIC					+						F	TE % *	1.	0000		Recu	rring Pay			
atus	FT - FULL TIME					-						н	ourly Rate		2	1.6313	21.6	313			
sk Code												D	aily Rate		17	3.0504	173.	0504			
ay Start/End *	01/01/2020			/ 12	/31/999	9 🛱						P	eriod Pay		1	,730.50	1,73	0.50			
av Freg *	B - BIWEEKLY			-	,01,000							A	nnual Pay		44	,993.11	44,9	93.11			
irade/Step	PSP	/	1	··· PAR	K SUPERV	ISOR						R	emaining			.00					
llocation	22		ALLO	CATION 22								R	eference			44,993.	11				
llocation Detail																					
PA Type Project Stri	ing				Org		Ob		Projec	zt	Loc	Grant		Amount		urs		ercent			
					16	177000	51	10			177			31495.18	56	.00	70.00	0000			
E BLDG -	-PHASE1 -SALA	RY -LA	BORBEN		16	177000	51	10			177			13497.93	24	.00	30.00	0000			



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.

= 🐝 Emp	loyee Job/Salary							
	Cancel							
mployee Identification	n							
mployee * S	SN Last Name	First Name		MI Suffix	Status			
701	654-98-7364 MCKNIGHT	AJ			A - ACTIVE	-		
MAIN CYC	LES/OTHER NEXT CHANGE CIVIL SER	ICE						
lob Class *	SUPR PARKS AND REC SUPERVISOR				Calc Code	11 D Hour	s/Day 8.00	
Summary Job Class	PR PRKS RECRE				Num Pays *	26.000 Hour	s/Year 2080.00)
osition *	17701 ··· PARK SUPERVISOR				Days/Year *	260.00 Days	/Period 10	
ау Туре *	111 ANNUAL SALARY				Sched Hours *	80.00 Facto	pr 1.0000	
ffective Date *	03/01/2020 to: 12/31/9999				Pay Basis	A Rema	ain 26.000	
	Primary Job/Position					Off-S	itep/Frozen N - No	-
Position Start/End *	01/01/2020 12/31/9999					Pay S	Status A - ACTIVE	-
ocation *	177 - PARKS AND RECREATION DEPART	*			Pay Amounts			
Broup/BU *	10 - NON UNION	-			FTE % *	1.0000	Recurring Pay	
Status	FT - FULL TIME	*			Hourly Rate	21.631	3 21.6313	
Risk Code					Daily Rate	173.050	14 173.0504	
Pay Start/End *	01/01/2020 / 12/31/9999				Period Pay	1,730.5	1,730.50	
Pay Freq *	B - BIWEEKLY -				Annual Pay	44,993.1		
Grade/Step	PSP / 1 PARK SUPERVIS	OR			Remaining	.0		
Allocation	1050 ··· STREET LIGHT PROJECT				Reference	44,9	93.11	
Allocation Detail								
PA Type Project Stri	ing Org	Object	Project	Loc	Grant	Amount Hours	Percent	
-		72255 5110	1050	177	224	96.55 40.00	50.000000	
] [11	6 5110] [1050	177	224	96.56 40.00	50.000000	

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

Retro Pay Change

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



Eack Search	Browse Add U	pdate Delete		rint Displa	PDF	Save	Excel	_	imail Sched		O	Duplicate	T ext	Global Add/Del	U Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	G Sched H
mployee Identificatio	n																			
mployee * S	ISN L	ast Name			First Name	e			MI Suf	ffix	Status									
702	654-93-4321	JONES			RODGER	R					A - AC	TIVE	-							
MAIN CYC	S291	NEXT CHANGE PSYCHOL		. SERVICE							Calc	Code	32	۵	Hours/Da	у		7.00		
Summary Job Class	COUN COU	INSELOR									Num	Pays *		26.000	Hours/Ye	ar		1295.00		
osition *	92369	F	PSYCHOLOGIST								Days	Year *		185.00	Days/Peri	od	0			
ау Туре *	111	ANNUAL SALARY									Sche	Hours *		0.00	Factor			1.0000		
ffective Date *	01/01/2020	to: 12/3	1/9999								Pay B	asis	A		Remain			26.000		
	Primary Job/Posi	tion													Off-Step/i		N - No		-	
Position Start/End *	01/01/2020	İ / 12	2/31/9999 🕻	a l											Pay Statu	9	A - A0	STIVE	Ŧ	
ocation *	9900 - ELEMENTA	ARY SCHOOL 5			~						Pay	Amounts								
iroup/BU *	9200 - TEACHERS	3			~						FTE 9	*	1.0	000		Recurr	ring Pay			
tatus	FT - FULL TIME				~						Hourl	y Rate		2	1.4170	21.41	70			
tisk Code	2000	··· PROFESS	SIONALS								Daily	Rate		14	9.9189	149.9	189			
ay Start/End *	01/01/2020		/ 12/31	/9999 🖬							Perio	-			066.73	1,066				
ay Freq *	B - BIWEEKLY		-									al Pay		27,	735.00	27,73	5.00			
Brade/Step	A	1	ВА								Rema				.00					
llocation	0										Refer	ence			27,735.0	0				
llocation Detail																				
PA Type Project Str	ing			Org		Object		Project	Loc		Grant		Amount	Ho	urs	Per	cent			

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).

ee Identification	n								
loyee* S	SSN Last Name	First Name	MI	Suffix	Status				
702	654-93-4321 JONES	RODGER			A - ACTIVE	Ŧ			
MAIN CYC	LES/OTHER NEXT CHANGE CIVIL	. SERVICE							
Job Class *	S291 PSYCHOLOGIST				Calc Code	32	Hours/Day	7.00	
Summary Job Class	COUN COUNSELOR				Num Pays *	26.000	Hours/Year	1295.00	
Position *	92369 ··· PSYCHOLOGIST				Days/Year *	185.00	Days/Period	0	
Pay Type *	111 ··· ANNUAL SALARY				Sched Hours *	0.00	Factor	1.0000	
Effective Date *	02/01/2020 to: 12/31/9999				Pay Basis	A	Remain	26.000	
	Primary Job/Position						Off-Step/Frozen	N - No 🔫	
Position Start/End *	01/01/2020	5					Pay Status	A - ACTIVE -	
Location *	9900 - ELEMENTARY SCHOOL 5	*			Pay Amounts				
Group/BU *	9200 - TEACHERS	-			FTE % *	1.0000	Recu	rring Pay	
Status	FT - FULL TIME	-			Hourly Rate		21.4170 21.4	170	
Risk Code	2000 ···· PROFESSIONALS				Daily Rate	14	19.9189 149.	9189	
Pay Start/End *	01/01/2020 / 12/31	/9999 🗈			Period Pay	1	,066.73 1,06	5.73	
Pay Freq *	B - BIWEEKLY V	·			Annual Pay	27	,735.00 27,7	35.00	
Grade/Step	A / 2 BA				Remaining		.00		
Allocation	0				Reference		27,735.00		
Allocation Detail									
PA Type Project Stri	ring	Org Object	Project	Loc	Grant A	mount He	urs Pe	rcent	



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



Pay End

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





Position Change

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

	rowse Add	Update	Delete	Dutput	Print	O Display	PDF	Save	Excel	Word	Email	() Schedule	0 Attach			ext Glob	al Glob Iel Upda	al Proj nte Upd	ect Reca	Ic Reset Pays	Mid-Year Reset	Sched
mployee Identificatior	1																					
mployee * St	SN	Last Nar	ne			1	irst Name				MI	Suffix	Statu	8								
700 :	321-65-7894	VALOR	RE				CHERYL						A -	ACTIVE	Ŧ							
	ES/OTHER		CHANGE		VIL SEF												_					
Job Class *			TEACHER E	LEMENTA	RY SCHO	DL								alc Code			Hour			7.00		
Summary Job Class		TEACHER												um Pays *			00 Hour			1295.00		
Position * Pay Type *	92319		AL SALARY	ACHER ES	52									ays/Year * ched Hours			00 Days			1.0000		
Effective Date *	01/01/2020	ANNO	to: 12/31	(0000										ay Basis			Rem			26.000		
	Primary Job/F		10. 12/31	/9999										ay Dasis	P			tep/Froze		- No	~	
																		Status		- ACTIVE	*	
Position Start/End *	01/01/2020			31/9999																		
Location *	9600 - ELEMEN		HOOL 2			Ŧ								ay Amour	its							
Broup/BU *	9200 - TEACHE					Ŧ								TE % * ourlv Rate		1.0000			ecurring P	ay		
Status Risk Code	FT - FULL TIME		PROFESSIO			Ŧ								ouriy kate aily Rate			23.201		162.4122			
	2000	•••												eriod Pay			1,155.6		1.155.63			
Pay Start/End *	01/01/2020				/31/999	9 🖬								nnual Pay			30.046.2		30.046.25			
Pay Freq *	B - BIWEEKLY			*										emaining				0				
Grade/Step	A	<u> </u>		ВА									R	eference				46.25				
Allocation	0																					
Allocation Detail																						
PA Type Project Stri	ng				Org	1		Object		Project		Loc	Grant		Amou	int	Hours		Percent			
					0.6	011101		7005				9600			30046.3	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.





😑 🤹 Emp	loyee Job/Salary						
	Carres						
Employee Identificatio	n						
Employee * S	ISN Last Name	First Name	MI	Suffix	Status		
700	321-65-7894 VALORE	CHERYL			A - ACTIVE	¥	
MAIN CYC	LES/OTHER NEXT CHANGE CIVIL SERVICE						
Job Class *	S220 TEACHER ELEMENTARY SCHOOL				Calc Code	32 DHours/	Day 7.00
Summary Job Class	TCHR TEACHER				Num Pays *	26.000 Hours/	Year 1295.00
Position *	92329 ··· TEACHER ES 3				Days/Year *	185.00 Days/P	
Pay Type *	111 ANNUAL SALARY				Sched Hours *	0.00 Factor	1.0000
Effective Date *	03/01/2020 to: 12/31/9999				Pay Basis	A Remain	
	Primary Job/Position						p/Frozen N - No 🐨
Position Start/End *	01/01/2020 🖬 / 12/31/9999 🖬					Pay Sta	A - ACTIVE -
Location *	9700 - ELEMENTARY SCHOOL 3	•			Pay Amounts		
Group/BU *	9200 - TEACHERS	·]			FTE % *	1.0000	Recurring Pay
Status	FT - FULL TIME	•			Hourly Rate	23.2017	23.2017
Risk Code	2000 ··· PROFESSIONALS				Daily Rate	162.4122	162.4122
Pay Start/End *	01/01/2020 🖬 / 12/31/9999 🖬				Period Pay	1,155.63	
Pay Freq *	B - BIWEEKLY -				Annual Pay	30,046.25	
Grade/Step	A / 4 BA				Remaining	.00	
Allocation	0				Reference	30,046	5.25
Allocation Detail							
PA Type Project Str	ing Org	Object Pr	oject L	oc	Grant	Amount Hours	Percent
] 970111			9700		46.25 0.00	100.000000
				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			100.000000
1 of 5 < <	Enter employee's position code						

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



= 🔆 Employee Job/Salary

Employee Identificat	ion										
Employee *	SSN	Last Name	Firs	at Name	М	Suffix	Status				
700	321-65-7894	VALORE		HERYL			A - ACTIVE	*			
MAIN CY	CLES/OTHER	NEXT CHANGE	CIVIL SERVICE								
Job Class *	\$220	TEACHER ELEN	IENTARY SCHOOL				Calc Code	32	Hours/Day	7.00	
Summary Job Class	TCHR	TEACHER					Num Pays *	26.00	0 Hours/Year	1295.00	
Position *		92329 ··· TEACH	HER ES 3				Days/Year *	185.0	0 Days/Period	0	
Pay Type *	111	ANNUAL SALARY								1.0000	
Effective Date *	03/01/2020	to: 12/31/99	99	🛄 🛄 Di	uplicating Prima	ry Pay To N	ew Job/Positio	n		26.000	
	Primary Job/	Position								I - No	-
Position Start/End *	01/01/2020	□ / 12/31/	9999 🖬		duplicating a base ant to keep the pay					- ACTIVE	Ŧ
Location *		INTARY SCHOOL 3	*		ing the old job/posi						
Group/BU *	9200 - TEACH				arked as primary fo				annig aranapping	Pay	
Status	FT · FULL TIM										
Risk Code	2000	PROFESSIONA	LS	If you w	ish to continue, ch	oose 'Yes'; oth	ierwise, choose 'No	o' to edit the re	cord.		
Pay Start/End *	01/01/2020	I /	12/31/9999			Yes	No	ſ			
Pay Freq *	B - BIWEEKLY	*				163		J			
Grade/Step	A	/ 4	BA				Remaining		.00		
Allocation							Reference		30,046.25		
Allocation Detail											
PA Type Project :	String		Org	Object	Project	Loc	Grant	Amount	Hours Perc	ent	
			97011101	7005		9700	300	046.25			

1 of 5 |< < > >|



Searching Pay History

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

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

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

	Browse Add Update		etput Print	Display			tcel Word	M Email	() Schedule	Attach -	Duplicate	1 Text	Global Add/Del	Giobal Update	Project Update	Recalc	B Repet Pays	Mid-Year Reset	H Sched Hour
mployee Identificatio	n																		
mployee * S	SSN Last !	Name		F	irst Name			M	I Suffix	Status									
686	089-04-9503 MO	WRY			SERRA					A - AC	TIVE	-							
MAIN CYC	LES/OTHER NE	(T CHANGE	CIVIL SE	RVICE															
Job Class *	FCL1	CLERK I								Calc	Code	11	D	Hours/Da	у		8.00		
Summary Job Class	FD FINANC	E								Num	Pays *		26.000	Hours/Ye	ar		2080.00		
Position *	13526	··· CLERI	KI								/Year *			Days/Per	iod	10			
Pay Type *		NUAL SALARY									d Hours *		80.00				1.0000		
Effective Date *		to: 01/31/20	20							Pay E	Basis	A		Remain	_		26.000		
	Primary Job/Position													Off-Step/ Pay Statu		N - N		~	
Position Start/End *	01/01/2020	12/31/	/9999 🖬											Pay Statu	9	A - A0	STIVE	+	
ocation *	135 - FINANCE DEPA	RTMENT		-							Amounts								
roup/BU *	10 - NON UNION			-						FTE 9		1.0	000			rring Pay			
atus	FT - FULL TIME			Ŧ							ly Rate			3.4595	13.4				
sk Code	5000	ADMINISTRAT	ION SERVICES							Daily				7.6758	107.0				
y Start/End *	01/01/2020	1	12/31/99	99 🖬							d Pay al Pay			076.76 995.71	1,076				
Pay Freq *	B - BIWEEKLY	*								Rema	,		27,	.00	27,91	55.71			
Brade/Step	CLR1 /	1	CLERK I							Refer	ence			27,995.7	1				
Allocation	0																		
Allocation Detail																			
PA Type Project Str	ring		0	rg	O	oject	Project		Loc	Grant		Amount	Hos	Ins	Pe	rcent			
			1	1135000	51	11			135		27	7995.71	80.	00	100.000	0000			





eck Search	Browse Add		Delete	∂ utput	Print	Oisplay	PDF	Save	Excel	Word	Emai	Schedule	0 Attach	*	Duplicate	Text	Global Add/Del	Global Update	Project Update	Recalc	B Reset Pays	Mid-Year Reset	(i) Sched Hours	
mployee Identificatio	n																							
nployee * s	SSN	Last Name				F	irst Name				MI	Suffix	s	tatus										
686	089-04-9503	MOWRY					SERRA							A - ACT	VE	*								
ob Class * ummary Job Class	FCL1	O	LERK I											Calo Co Num Pi		11	26.000	Hours/Da Hours/Ye			8.00			
osition *	13526		(LERKI										Days/Y			260.00			10				
ay Type *	111	ANNUAL	SALARY											Sched			80.00				1.0000			
ffective Date *	02/01/2020		to: 12/3	1/9999										Pay Ba	sis	A		Remain			26.000			
	Primary Job/Po	sition																Off-Step/	Frozen	N - N	>	-		
osition Start/End *	01/01/2020		/ 12	/31/9999														Pay Statu	18	A - A0	TIVE	Ŧ		
ocation *	135 - FINANCE			, ,		~								Pay Ar	nounts									
iroup/BU *	10 - NON UNION	4				-								FTE %		1.0	000		Recur	ring Pay				
itatus	FT - FULL TIME					+								Hourly	Rate		1	3.8200	13.82	:00				
lisk Code	5000	4	ADMINIS"	FRATION SE	ERVICES									Daily R	ate		11	0.5600	110.5	600				
ay Start/End *	01/01/2020			/ 12	/31/9999									Period	Pay			105.60	1,105	.60				
ay Freq *	B - BIWEEKLY			-										Annual			28,	745.60	28,74	5.60				
irade/Step	CLR1	/	2	CLE	RK I									Remain				.00						
llocation	0													Referer	ice			28,745.6	50					
location Detail																								
location Detail A Type Project Str	ring				Org			Object		Project		Loc	Gra	int	,	mount	Hou	irs	Per	rcent				

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.