A decorative graphic on the right side of the page features three overlapping circles of varying sizes, each composed of concentric blue rings. Two thin blue lines intersect at the top left, forming a large 'V' shape that frames the circles.

# Personnel Actions

MUNIS - Payroll

This guide is to help payroll users decide when a Personnel Action (PA) is needed, what Action/Reason Codes are appropriate to use and how to complete the PA for the necessary employee change.

**Coleen Lisauskas**  
**2017**

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## When is a Personnel Action Needed?

Anytime there is a payroll type change to an employee's information, a Munis Personnel Action (PA) is usually needed. The PA process in Munis allows for the appropriate staff to be notified and/or approve these payroll changes. While streamlining the PA process, we're also able to attach proper documentation and additional notes to provide enhanced historical records. Comprehensive descriptions and how to enter PA's for the below listed payroll changes will be provided later in this guide.

- New Hire, Rehire, Reinstatement
- Salary Change
- Default GL Updates, Position Only Changes
- Leave, Layoff, Return from Leave, Termination

## ESS = Good News!

Employees now have the power to make some changes to their personal information via our online tool "ESS" or Employee Self Service. The website <https://ess.cityofmadison.com/> can be accessed from any City computer as well as from the employee's home or personal computer. Changes entered in ESS immediately update into the Live Munis environment. Items employees can update via ESS:

- Home Address
- Email Address (used for electronic delivery of direct deposit advice)
- Phone Number
- Emergency Contact

While ESS is a wonderful user friendly tool, employees are encouraged to confirm what their agencies preferred methods are to process these changes. A Munis PA may be submitted in place of the employee entering the change in ESS.

## Wait, there's more

Other benefits accessible on ESS include electronic copies of previous pay stubs and W2's, access to accrual balances and a check simulator tool that allows employees to see how tax withholding and pay changes may impact their take home pay. *Employees may use ESS even if their agency does not use it for time entry purposes.*



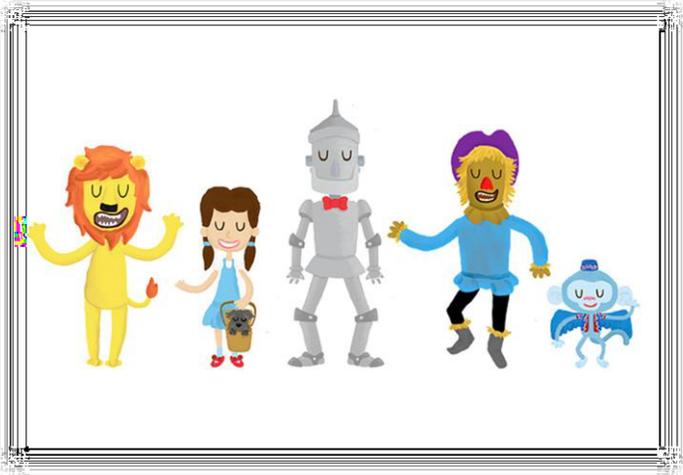
## When in doubt

Contact Central Payroll ([payroll@cityofmadison.com](mailto:payroll@cityofmadison.com)) and they can inform you if a PA is needed. Some mass employee changes or simple updates may be handled directly by Central Payroll and will not require a PA.

## New Hire, Rehire, Reinstatement... OH MY!

### New Hire

In the wonderful land of Munis, a New Hire is defined as an employee not previously setup in Munis. This means the employee has not previously worked in your agency, in another agency or as an election official since July of 2014 when all active employees were converted from SxD to Munis. **HR completes the Munis PA, releases it for Central Payroll to finish and post to the live environment.**



### Rehire

A Rehire is considered a terminated employee who previously worked for the City (since the time of Munis) and is returning to employment in a different Job Class than previously held. Once the hire has been processed through NeoGOV, HR will email your agency and Central payroll the approved NeoGOV paperwork indicating that a Munis PA is needed.

If the employee is coming from a different agency, Central Payroll will transfer the employee to your agency. They will notify you when this is complete and provide the Munis employee number so you may begin the Munis PA. New W4 forms are required as well as a new direct deposit authorization form if the employee wishes to participate in direct deposit. These forms may be sent inter-d to Central Payroll or attached to the Munis PA.

When processing the Rehire PA, you will use Action Code – S001 Salary Change with Reason/Authorization code S116 – Rehire.

### Reinstatement

A Reinstatement is a terminated employee returning to City employment within a 2 year period to the same job class and agency. New W4 forms are required as well as a new direct deposit authorization form if the employee wishes to participate in direct deposit. These forms may be sent inter-d to Central Payroll or be attached to the Munis PA.

When processing the Reinstatement PA, you will use Action Code – R001 Reinstatement with Reason/Authorization code R100 – Reinstatement.

## Show Me the Salary Change!

The Action Code S100 - Salary Change is one of the most common types of PA's. This action code is linked with the various Reason/Authorization codes to process promotions to demotions. The highlighted items below are the more commonly used Reason/Authorization codes. These must be used with the S100 – Salary Change Action Code.



S100	<b>PROMOTION</b>	Competitive process - moving to a position in higher salary range classification and/or comp group.
S101	<b>COMPETITIVE DEMOTION</b>	Competitive process - moving to a position in lower salary range classification.
S102	<b>CAREER LADDER</b>	Non-competitive promotion process. (i.e. Accountant 1 to Accountant 2)
S103	<b>RECERTIFICATION</b>	Change in FTE percent
S104	APPRENTICE PROMOTION	Promotion of apprentice to higher salary range.
S105	VOLUNTARY DEMOTION	Non-competitive, employee voluntarily going from one class to another in a lower salary range.
S106	INVOLUNTARY DEMOTION	Non-competitive, employee involuntarily going from one class to another in a lower salary range.
S107	<b>RECLASSIFICATION</b>	Employee revalued job duties based on HR, Personnel Board and Council action.
S108	CONTRACTUAL BID	METRO ONLY
S109	TRIAL PERIOD RETURN	Employee contractual right to return to previous status within 6 months of changed status.
S110	ELECTED	Public election process (non-civil service)
S111	PROVISIONAL	Employee appointed to a provisional position.
S112	CONTRACT/ORDINANCE	PAYROLL USE ONLY
S113	STEP	PAYROLL USE ONLY
S114	LONGEVITY	PAYROLL USE ONLY
S115	EDUCATIONAL INCENTIVE	POLICE/FIRE ONLY
S116	<b>REHIRE</b>	Employee returning to City employment but within a new job class and/or agency
S117	ORDINANCE PROGRESSION	Automatic, elapsed time period changes to salary range based on ordinance.
S118	<b>SHIFT/PREMIUM CHANGE</b>	Adding/removing premium pays from an Employee due to job/position/shift change.
S119	PROVISIONAL APPOINTMENT ENDED	Employee's provisional term is complete.
S120	TRAINING PROGRAM PROGRESSION	Employee has completed the requirements to move to next step of agreed training program



## The “Other” Side of Things

The Action Code O001 – Other is used (as you may have guessed) for other types of changes. These are more general housekeeping types of changes such as address changes or updating an employee’s default account string. Below are the Reason/Authorization codes that are used with the Action Code O001 - Other.

O099	POSITION NUMBER CHANGE ONLY	Employee is changing position number only and there is no change to their pay or job class.
O100	ACTING TO PERMANENT	Employee change from acting to permanent status.
O101	LATERAL TRANSFER	Employee is transferring from one agency to another without a change in job class or pay.
O102	DISPLACEMENT	Employee has moved to a new position in an equal/lower class due to bump process.
O103	ACCOMMODATION	Employee placement to provide workplace accommodation.
O104	TITLE CHANGE ONLY	Resolution requiring a change to an employee’s job class for the purpose of a title change only (no change to pay).
O105	MOU	Change to employee status, seniority, etc due to agreed action between City /Union or Association.
O106	<b>DEFAULT ACCOUNT STRING</b>	Change default GL or allocation of an employee.
O107	SUPERVISOR	Update supervisor of employee only.
O108	<b>ADDRESS CHANGE</b>	Update employee address.
O109	PHONE NUMBER CHANGE	Update employee contact number.
O110	DEMOGRAPHIC CHANGES	Update employee’s self-reported or required demographics.
O111	EMERGENCY CONTACT CHANGE	Update employee's emergency contact information
O112	LEGAL NAME CHANGE	Update employee's legal name.

## You say Goodbye but I say PA!



### Leave, Layoff, Return from Leave

When an employee goes out on an unpaid consecutive Leave, changes to Layoff status or Returns from a Leave, a PA is needed.

The effective date for **Leave** PA, where the employee is going out on a leave, should be the first day the employee was in unpaid status. This means they have exhausted any applicable leave types and is beginning a period of time without pay (AWOP).

The effective date for a **Return from Leave** PA is the first day the employee returned to paid status.

The effective date of a **Layoff** PA should be the Layoff date provided in the Layoff Letter from HR.

The Action Code – L001 **Leave** is used with the appropriate Reason/Authorization leave codes described below.

L100	FMLA	Employee is going out on approved FMLA leave.
L101	DISABILITY LEAVE	Employee is going out on approved disability leave.
L102	MILITARY LEAVE	Employee AWOP for an extended military leave.
L103	ADMINISTRATIVE LEAVE	Employee AWOP due to administrative order.
L104	DISABILITY LAYOFF	Employee has not successfully returned from disability leave after 6 months.
L105	RECALL FROM LAYOFF	Employee is returning to a position from layoff status.
L106	RETURN FROM LEAVE	Employee is returning to a position from a leave status.
L107	PERSONAL	Employee is going out on approved non-medical leave.

### Termination

The T001 – Termination Action Code is used when an employee ends employment with the City.

The effective date of a Termination PA should always be the last day the employee was in *paid* status. This is usually their last day worked. Retirees may use paid leave time to extend their termination date. Below are the Reason/Authorization codes for this PA type.

T100	RESIGNED - OTHER JOB	T112	DISCHARGED - RULE INFRACTION
T101	RESIGNED - RETURNED TO SCHOOL	T113	DISCHARGED - POOR QUALITY
T102	RESIGNED - DISSATISFIED W/ WORK	T114	DISCHARGED - LOW QUANTITY
T103	RESIGNED - MOVING	T115	DISCHARGED - NO RTRN FRM SUSPN
T104	RESIGNED - NO RETURN FRM LEAVE	T116	DISCHARGED - FAILED PROBATION
T105	RESIGNED - MEDICAL	T117	DISCHARGED - OTHER
T106	RESIGNED - RETIRED	T118	TERMINATION - END OF SEASON
T107	RESIGNED - DISABILITY RETIRE	T119	TERMINATION - END OF EMERGENCY
T108	RESIGNED - PERSONAL	T120	TERMINATION - END OF LTE APPT
T109	RESIGNED - OTHER	T121	TERMINATION - POSITION ABOLISH
T110	DISCHARGED - EXCESS ABSENTEE	T122	TERMINATION - DEPT ABOLISHED
T111	DISCHARGED - POLICY VIOLATION	T123	TERMINATION - DEATH



## So How Do I...?

Now to the good stuff, how to actually do a Munis PA! All PA's, regardless of the reason, start out the same way. Let's begin with the basics:

Locate "Actions Entry" under your Tyler Menu

### Tyler Menu

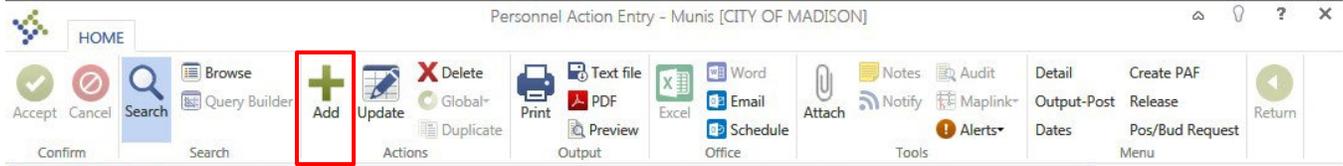
Search

- ▾ Munis
  - Financials
  - ▾ Human Resources/Payroll
    - ▾ Human Resources
      - Personnel Setup
      - Position Control and Budgeting
      - Next Year Planning
      - Employee Job/Pay Classification
    - ▾ Personnel Actions
      - Actions History Inquiry
      - Actions Entry**
      - Actions Create
      - Action Codes

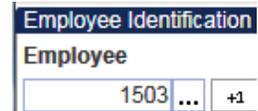
The Personnel Action Entry screen will appear



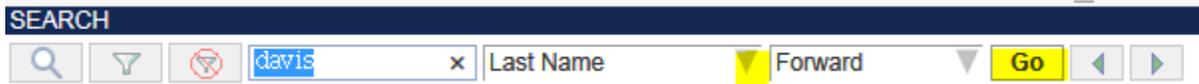
Now we will click the **Add** button in the top ribbon



The first field you'll need to enter is the employee's number. If you already know the employee number, you may enter it and press tab to move to the next step.



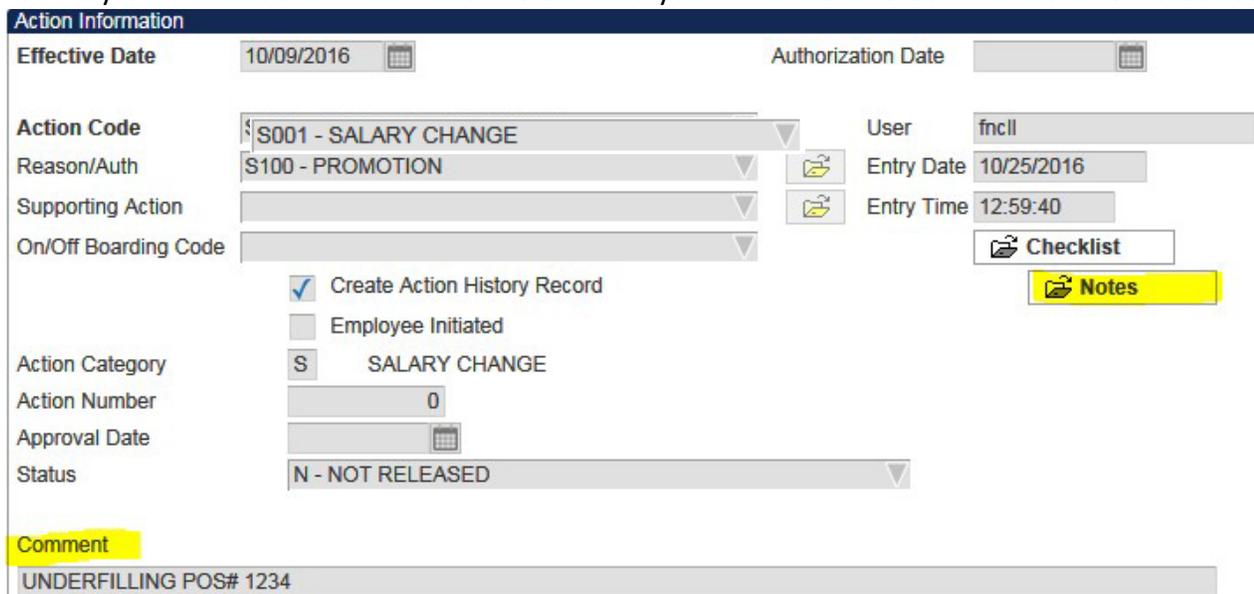
If you do not know it, you may click on the **...** symbol to pull up a search/filter window.



You may search by last or first name using the provided drop down menu. Click Go to run your defined search or filter criteria. Once you've selected your employee, click Accept at the top. It will populate the employee number of your identified employee in the employee field.

Now that you have your employee selected, enter the appropriate effective date. This is usually the first day of the pay period. Tab to Action Code, choose the code applicable to your PA (see the above sections if you're not sure which to choose). Tab to the Reason/Auth field and do the same. Remember, the first letter of the Action Code must match the first letter of the Reason/Auth code. For example, the **S001** – Salary Change (Action Code) may be used with any of the **S100-S120** Reason/Auth codes. The combination of the Action and Reason/Auth codes determines the workflow in Munis and who will receive notifications or approval requests.

You may enter additional information relevant to your PA under the Comment or the Notes sections.



Click Accept and you've created a PA!



Now that you've created the PA, you can attach any supporting documentation or enter changes to the employee detail. Once completed, you may release the PA for processing.



The **Attach** icon will allow you to attach important documents related to your PA such as an approved NeoGOV form or HR correspondence.

Click **Attach**

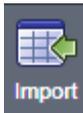
Select **Personnel Action Attachment**

Document Title	TCM Document Type	Read Only	Count
Personnel Action Attachment	Personnel Action Attachment		0
Personnel Action Form	Personnel Action Form	✓	0

Click **View Documents** or double click on Personnel Action Attachment



Click



Click

and choose your file you want to attach, then Open

File name: PA cheatsheet 02-27-2015.docx All Files (\*.\*)



Click

and then



to exit

**You may now Release your PA for approvals and processing. (Huzzah!)**

Personnel Action Entry - Munis [TEST DATABASE Oct 21 2016]

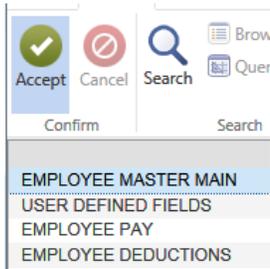
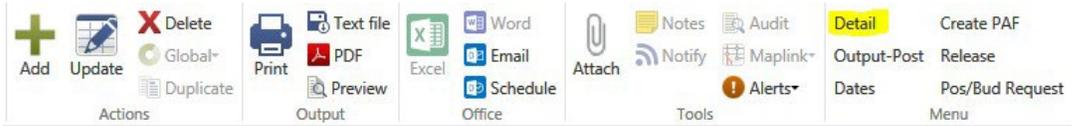
If you are unsure of where a PA is at in the Munis workflow process, search in Actions Entry for the employee. If the status is **X - IN PROGRESS** then the PA has not received its final required approval. When you click on **Approvers** in the bottom ribbon, you will see what step the PA is at. In most cases, if you've received the approval notification email, the PA has been successfully posted.

## Extra! Extra! Read all about PA's!



There are some additional items you may do to better communicate the desired changes and speed along the PA process. These include updating the employee job class, supervisor and default GL information.

Once you've created the PA (but before you've released it) go to "Detail" on the top right of the PA ribbon.



All changes start on the "Employee Master Main". Select "Employee Master Main" then click Accept.

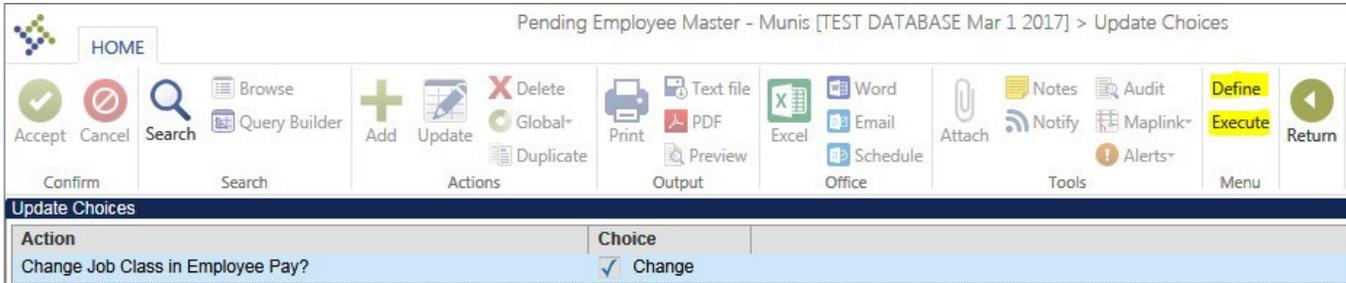
Once on the Employee Master, click "Update" to enter changes. Common changes that can be entered are Job Class, Org or Supervisor changes.

The employee's supervisor can be found on the bottom of the Address tab.

Once done with your edits, click "Accept". If you've made changes to the job class, project account string or the GL (org/object/project) you will prompted with the choice to push these changes through to the employee's job/sal records.

The screenshot shows the 'Employee Master Main' interface with the 'Address' tab selected. The 'Employee Information' section is visible, showing details for Employee 10279 (SSN 123-45-6789, Last Name POTTER, First Name HARRY). The 'Job Class' is F080 (LABORER-16-H), 'Location' is 5100 (PARKS), and 'Group/BU' is 6316 (60 GENERAL). The 'Pay Frequency' is B - BIWEEKLY. The 'Org/Obj/Proj' is 51242 (51210, 00000) (PK MTC WES HRLY WAGES). The 'Department' is 51 (PARKS) and 'Personnel Status' is HR - HOURLY. The 'Check Location' is 5100 (PARKS).

Click “Define” to check the item you wish to change. It is appropriate to push Job Class changes through to the Employee Pay (job/sal) records and this assists Central Payroll in processing the PA more efficiently. For GL or Project account string changes, you may want to review how they are set up on the employee’s job/sal records ahead of time. Some agencies have different GL, allocations or project accounts defined on specific pay codes. Once you have checked the appropriate changes, click “Accept” and then “Execute”.



If you do not wish to select any changes, simply click **Return** and no changes will be made to the job/sal records.

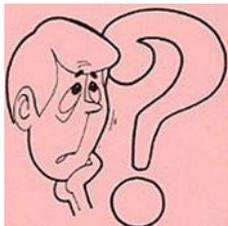
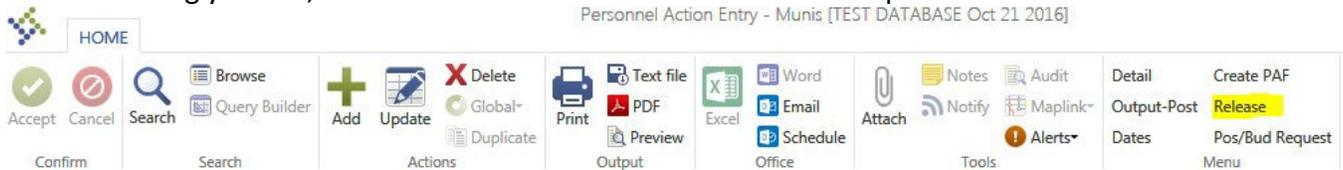
When finished with your changes, click “Return” until back to the main screen of Personnel Action Entry. To review your edits, click on “Create PAF” on the top right ribbon.



Click “Open” on the bottom prompt:



After reviewing your PA, click “Release” to start the Munis workflow process.



### Don't Worry!

Changes made in Personnel Actions are not immediately applied to the live environment. PA's are thoroughly reviewed prior to being approved and posted. If you have any questions, please contact your friendly Central Payroll team 😊

- Most PA's cannot be processed until the previous payroll is completed. For example, a PA to go into effect for Payroll 2 cannot be processed until Payroll 1 has been completed (checks are issued).
- Munis does not cleanly process PA's that are dated the same day for the same employee. As long as you have not received the approval notification email, you can still go into an existing PA and make additional changes. You will need to re-release the PA and the workflow process will begin again.
- When entering an address, email or phone number change PA, please go into the Employee Master Main on the PA and enter the change. Only entering the new contact information in the comments or as an attachment slows down the processing of the PA.
- Review your attachments – The NeoGOV PA may indicate a GL or allocation that is not correct. If this is the case, please indicate in the Comments or Notes section the correct account string.
- Ensure the Action Code and Reason/Auth fields are appropriate. The first letter of the Action Code must match the first letter of the Reason/Auth code. For example, the S001 – Salary Change (Action Code) may be used with any of the S100-S120 Reason/Auth codes. The combination of the Action and Reason/Auth codes determines the workflow in Munis and who will receive notifications or approval requests.
- To review previously posted PA's go to Actions History Inquiry. This can be found under Human Resources-Payroll/Human Resources/Personnel Actions.
- Employee's can make changes in ESS such as email address (for delivery of advice statement), home address, emergency contact information and phone numbers.
- Do not to enter PA's *too* early – When you create a PA, it takes a snapshot of the employee's current setup. If you're creating a PA for an advance date, there may be changes to the employee that happen before your PA is posted. This may cause incorrect changes to be applied. Try to limit entering PA's to 1-2 payrolls ahead of time.
- When in doubt, contact Central Payroll – [payroll@cityofmadison.com](mailto:payroll@cityofmadison.com)

