

# How to Enter a Personnel Action

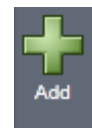
Munis Version 10.5

## Overview:

Departments use the Personnel Actions Entry program to appoint new employees and to initiate employee status changes. Action Entries are approved by department management, HR, and payroll through workflow.

## For All Actions:

- From the Menu, select **HR/Payroll → Human Resources → Personnel Actions → Actions Entry**
- To create a new Personnel Action Form (PAF), click the **Add** button in the Munis ribbon.



## New Hires

New Hire PAFs are completed whenever a new employee accepts a position at the city. Select this action type only if the employee does not have a city employee number assigned.

- In the Employee Identification section of the form, click the **+1** button to the right of the **employee number** field to assign a new employee number.

Personnel Action Entry - Munis [VERIF DATABASE May 14 2014]

Employee Identification						
Employee	SSN	Last Name	First Name	Middle Name	MI	
20005 ... <b>+1</b>	789-45-6123					

Main **Other**

Action Information	
<b>Effective Date</b>	06/02/2014 15
<b>Action Code</b>	AP - APPOINTMENT NEW HIRE
<b>Reason/Auth</b>	AP02 - REGULAR APPOINTMENT
<b>Supporting Action</b>	
<b>On-Boarding Code</b>	
<input checked="" type="checkbox"/> Create Action History Record	
<b>Action Category</b>	N NEW HIRE
<b>Action Number</b>	
<b>Approval Date</b>	
<b>Status</b>	N - PENDING APPROVAL
<b>Comment</b> CHARGE TO 62001542	
<b>Electronic File Path</b>	

**Workflow**

Approve Reject Hold Forward Approvers

0 of 0 Attachments (0)

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- Enter the **SSN** from the employee's application. You will receive a warning message if the SSN is already in the employee master. If hiring a City retiree as an hourly employee, call Human Resources. For all other situations, click Cancel and enter a rehire PAF using the employee's existing employee number.
- Use the **Tab** key to move through the PAF to auto-complete certain fields. After entering the SSN, tabbing will move to the **effective date** field. The name will be entered later in the process. Enter the employee's start date.
- For the **Action Code**, select **AP – NEW HIRE**
- For the **Reason/Auth.** select either:
  - **AP01 – HOURLY APPOINTMENT**
  - **AP02 – REGULAR APPOINTMENT**
- Enter **Comments**. You can enter up to 60 characters in this field.
  - For **hourly appointments**, enter the hourly rate, the org code for the payroll charges, and indicate if the person is a rehire or not.
  - For **regular appointments**, enter the position control number, and note any pre-approvals from the HR Manager for exceptions to accruals or step level.
- Click **Accept**. *Note:* If you type more than 60 characters in the comments field or tab after entering your comments, Munis will open the Other tab; use the tab key to move through the payoff amount information fields and continue with the form.
- You will now be in the **Condensed Pending Master file** form.

- Enter the employee's **last name**, **First name**, and **middle name** (or **middle initial**).
- Enter the **Primary Job Class**. If you know the job class number, you may type it in directly, or use the ellipses button

Condensed Pending Masterfile - Munis [VERIF DATABASE May 14 2014]

Employee	SSN	Last Name	First Name	Middle Name	MI	Suffix
20010	456-78-9123	DOUGH	JANE		X	

Main | Address | Demographics | Dates

**Primary Job Class** 4027 ... INFO SYSTEMS SUPV

**Primary Location** 1541 - ADMIN SVCS-NETWORK/INFRASTRUCT

**Primary Group/BU** 04 - SUPERVISORS

**Pay Frequency** B - BIWEEKLY

Project Account

**Primary Org** 1010 ... Payroll Im; Non-Departmental

**Primary Object** 505555 ... Employee Master Account

Primary Project

**Personnel Status** FT - FULL-TIME REGULAR

Check Location

New Employee

- to the right of the field to select it from a list.
- Select the **Primary Location** from the list of available locations. If you know the number, you may type it in directly.
- The **Primary Group** and **Pay Frequency** fields will auto populate with the correct information if you have used the tab key to move around the form.
- In the **Primary Org** field, enter **1010** (Payroll Im; Non-Departmental)
- In the **Primary Object** field, enter **505555** (Employee Master Account)
- Select the **Personnel Status** from the list of available options.

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- On the **Address tab**, enter the employee's home address information.
  - Type the street address in the Address line;
  - Tab to the zip code field to enter the zip code to populate the city and state information.

- Enter the employee's **home phone number** in this format: (xxx) xxx-xxxx.

- For hourly employees only, enter the employee number for the new hire's **Supervisor or Manager**. If you do not know the number, use the ellipses button to select the Supervisor or Manager from the list.

- On the Demographics tab, select the employee's **gender, Ethnic Code, Part/Full Time Status**.

- Click on the **Dates tab** and enter:

- Birth Date** – enter if known or use 1/1/1990 if not known
- Hire Date** – date employee starts
- Accrual date** – for regular employees only.

Enter the date that accruals start for the employee. For most new hires, this is the same as the Hire Date. Call HR if the new hire negotiated to receive additional benefits. In Employee Master, this is the Accrual date field.

- Permanent Date** – leave blank.
- Retirement/Pension Date** – leave blank.
- Include In Payroll After** – leave blank. Use the date Munis supplies. Munis will populate this field when you save the record.
- Note: Munis will add the current date as the service date and permanent date if these fields are left blank and the PAF is saved. To clear automatically generated dates, click **update** after saving your changes and clear the dates from these fields.
- Click **Accept** to save the record.

# How to Enter a Personnel Action Form

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- Click **Return** to return to the PAF entry screen.
- Click the **Release** button from the Menu to release into workflow.

## Terminations

Termination Actions are entered whenever an employee separates from the City, regardless of who initiates the separation. In Actions Entry, complete the following:

- Click **Add**.
- Enter the **employee number**. If you do not know the employee's number, use the ellipses button to select it from the list.
- Munis will populate the **Employee's first, last, and middle** name and **initial**.
- Note: You will receive a warning if there is already a pending Action on file for the employee.
- Enter the **effective date** of the termination. For **retroactive changes**, enter the actual termination date.
- Enter the applicable **action code**, EH for Hourly employees and ER for regular employees.
- Enter the **reason/auth code**. See the table on pages 11-12 for the list of reason/auth codes. The reason/auth code should begin with the same two letters as the action code. Note that "Dismissed" should only be used when an employee is terminated for cause. For an hourly employee whose position is no longer required, use "End of Assignment."
- **Comments** are optional.
- Click **Accept** or press Enter to accept your changes.

Main **Other**

**Action Information**

Effective Date	08/09/2014 15	Authorization Date		15
Action Code	EH - END OF EMPLOYMENT HOURLY	User		
Reason/Auth	EH03 - END OF ASSIGNMENT	Entry Date		
Supporting Action		Entry Time		
On-Boarding Code		Checklist		
	<input checked="" type="checkbox"/> Create Action History Record	Notes		
	<input type="checkbox"/> Employee Initiated			
Action Category	T TERMINATE			
Action Number	0			
Approval Date				
Status	N - PENDING APPROVAL			

Comment

Electronic File Path

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This will open the **Condensed Pending Employee Master** application.

- Click the **Update** button.
- In the **Employee Identification** section, change the **Status** to Inactive.

Pending Employee Master - Munis [TRAINING DATABASE Aug 13 2014]

Employee Identification

Employee	SSN	Last Name	First Name	Middle Name	MI	Suffix	Status
							I - INACTIVE

Preferred Name

- On the **main tab**, update the **Personnel Status**. Note that the status of "Terminated" should only be used when an employee is dismissed for cause. For an hourly employee whose position is no longer required, select "EA Hourly - End of Assignment."

Main Dates Demographics Address Payroll Mail Sort Last Change User Defined Benefit FTEs

Employee Information

Job Class: 8017 PC/NETWORK TECH I

Location: 1541 ADMIN SVCS-NETWORK/INFRASTRUCT

Group/BU: 18 HOURLY SEIU

Pay Frequency: B - BIWEEKLY

Project Account: ...

Org/Obj/Proj: 1010 505555

Employee Master Account: ...

Department: 1541 Admin Svcs-Network/Infrastruct

Personnel Status: EA - HOURLY END OF ASSIGNMENT

Check Location: ...

New Employee

Substance Screening Pool

State ID: ...

Text Checklist

- On the **Dates tab**, enter the effective date of the separation in the **Inactive** field.

- Click **Accept** or press Enter.
- You will be prompted to select **update choices**.
- Accept the default selection and click the **Execute button** in the menu.
- Click **Return** to return to the Condensed Pending Master File.
- Click **Return** to return to the Personnel Action.
- To return to the Condensed Pending Master file from any time within the Action Entry screen, click **Details**.
- Click **Release** to release the action into workflow.

Pending Employee Master - Munis [TRAINING DATABASE Aug 13 2014] > Update Choices

Update Choices

Action	Choice
Change Personnel Status in Employee Pay?	<input checked="" type="checkbox"/> Change

Define

**Execute**

Menu

# How to Enter a Personnel Action Form

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## Leave of Absence

Employees who take a leave of absence require a Personnel Action. In Actions Entry, complete the following:

- Click **Add**.
- Enter the **employee number**. If you do not know the employee's number, use the ellipses button to select it from the list.
- Munis will populate the **Employee's first, last, and middle** name and **initial**.
- On the main tab, enter the **effective date** of the leave. For **retroactive changes**, enter the actual start date of the leave.
- Enter LV for the **action code** for both hourly and regular employees.
- Enter the **reason/auth code**. See the table on pages 11-12 for the list of reason/auth codes. The reason/auth code should begin with the letters LV.
- **Comments** are required. See the table on pages 11-12 for more details.

The screenshot shows the 'Main' tab of the Personnel Action Form. The 'Action Information' section is active, displaying various fields for leave entry. The 'Effective Date' is set to 08/30/2014, and the 'Authorization Date' is also set to 08/30/2014. The 'Action Code' is 'LV - LEAVE OF ABSENCE', and the 'Reason/Auth' code is 'LV02 - LEAVE WITHOUT PAY'. The 'Supporting Action' and 'On-Boarding Code' fields are empty. The 'User' and 'Entry Date' fields are also empty. The 'Entry Time' field is empty. There are buttons for 'Checklist' and 'Notes'. The 'Create Action History Record' checkbox is checked, and the 'Employee Initiated' checkbox is unchecked. The 'Action Category' is 'L LEAVE', and the 'Action Number' is '0'. The 'Approval Date' is set to 08/30/2014, and the 'Status' is 'N - PENDING APPROVAL'. The 'Comment' field contains the text 'TO CARE FOR SICK MOTHER'. The 'Electronic File Path' field is empty.

- On the Other tab, enter the **estimated return date** and Click **Accept** or press Enter to accept your changes.
- Click **Release** to release the Action into Workflow.
- Note that there are no entries required in the Condensed Pending Master file for leaves.

The screenshot shows the 'Other' tab of the Personnel Action Form. The 'Employee Info' section is active, displaying fields for Job Class (7328), Location (1542), Group/BU (17), Project Account, Org (1010), Object (50555), and Project. The 'Evaluations' section shows Evaluation Score (0.00). The 'Pay Off' section shows Amount (0.00) and Type. The 'Leave' section shows Leave Length, Estimated Return (11/03/2014), and Seniority Impact (unchecked). The 'Estimated Return' field is highlighted with a red box.

# How to Enter a Personnel Action Form

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## Reinstatements and Rehires

When a former regular employee returns to a position within one year of resignation, and resumes the seniority and benefits that they had at separation, it is called a **reinstatement**. The department enters a **Reinstatement (RR02) action**.

**Rehires** can be former hourly employees returning for another assignment, regular employees who have been resigned for more than one year or employees who are returning to different positions. For these employees, the department enters a **Rehire (RH01 OR RR01) action**.

## Reinstatements

- On the main tab, enter the **effective date** of the reinstatement.
- Enter RR for the **action code**.
- Enter RR02 for the **reason/auth code**.
- In the **Comments** field, enter the position control number, and note any pre-approvals from the HR manager for exceptions to accruals or step level. You can enter up to 60 characters in this field.

The screenshot displays the 'Action Information' tab of a personnel action form. The form includes the following fields and options:

- Effective Date:** 08/30/2014
- Authorization Date:** [Empty]
- Action Code:** RR - REHIRE REGULAR
- Reason/Auth:** RR02 - REINSTATEMENT
- Supporting Action:** [Empty]
- On-Boarding Code:** [Empty]
- User:** [Empty]
- Entry Date:** [Empty]
- Entry Time:** [Empty]
- Create Action History Record
- Employee Initiated
- Action Category:** O OTHER
- Action Number:** 0
- Approval Date:** [Empty]
- Status:** N - PENDING APPROVAL
- Comment:** POSITION CONTROL # [Empty]
- Electronic File Path:** [Empty]

Click **Accept** to open the **Condensed Pending Master file**.

- In the **Employee Identification** section, change the **status** to Active.
- On the **Main tab**, update the **Personnel status**.
- On the **Dates tab**, clear the **Inactive date**. Note the **hired date** and **accrual date** are the original dates.
- Click **Accept** or press enter. This will open the **Update Choices** window.
- Accept the defaults and click the **Execute** button. Click **return** to return to the pending master file.
- Click **return** to return to the Personnel Action. Click **release** to release it into workflow.

# How to Enter a Personnel Action Form

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## Rehires

- On the main tab, enter the **effective date** of the rehire.
  - Enter the **action code** RH for hourly rehires and RR regular employees.
  - Enter the **reason/auth code** RH01 for hourly rehires and RR01 for regular rehires.
  - **Comments:**
    - **Hourly rehires:** the hourly rate and the org code for the payroll charges
    - **Regular rehires:**, the position control number, and note any pre-approvals from the HR Manager for exceptions to accruals or step level.
  - Click **Accept** or press enter to open the **Condensed pending master** file.
  - In the **Employee Identification** section, change the **status** to Active.
  - On the **Main tab**, update the **Job Class**, **Location**, **Group/BU**, **Department** and **Personnel Status**.
- On the **Dates** tab:
- clear the date from the **Inactive** field.
  - Update the **Hired date** with the new start date.
  - For hourly rehires, clear the **Accrual date**.
  - For regular employees, enter the new hired date as the **Accrual date**.
  - Click **Accept** or press enter to save.
  - Click **Return** to return to the Action.
  - Click **Release** to release it into workflow.



# How to Enter a Personnel Action Form

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## Salary or Status Changes

All other Personnel Actions fall under the Status Change category. These include changes to the job class, location, charge number, as well as status changes such as appointment from hourly to regular, acting out of class, and returning from acting, promotions and demotions, and reclassifications.

- On the main tab, enter the **effective date** of the change.
- Enter the **action code**, SH for hourly employees and SR for regular employees.
- Enter the **reason/auth code**. See the table on pages 11-12 for the list of reason/auth codes. The reason/auth code should begin with SH for hourly employees and SR for regular employees.
- **Comments** are required for all status changes. Please see the table on pages 11-12 for what to enter in the comments section for each reason/auth code type..
- Click **Accept** to open the **Condense Pending Master file**. Some status change actions require updates to the master file and others do not. See the table on page 13 for more information about what to enter in the pending master file for each reason/auth code type.

The screenshot displays the 'Action Information' tab of a personnel action form. The 'Effective Date' is set to 08/30/2014. The 'Action Code' is 'SR - STATUS CHANGE REGULAR' and the 'Reason/Auth' is 'SR06 - MERIT INCREASE'. The 'Action Category' is 'S - SALARY CHANGE'. The 'Status' is 'N - PENDING APPROVAL'. The 'Comment' field contains the text 'MOVE TO STEP 5'. There are also checkboxes for 'Create Action History Record' (checked) and 'Employee Initiated' (unchecked). Buttons for 'Checklist' and 'Notes' are visible on the right side of the form.

# How to Enter a Personnel Action Form

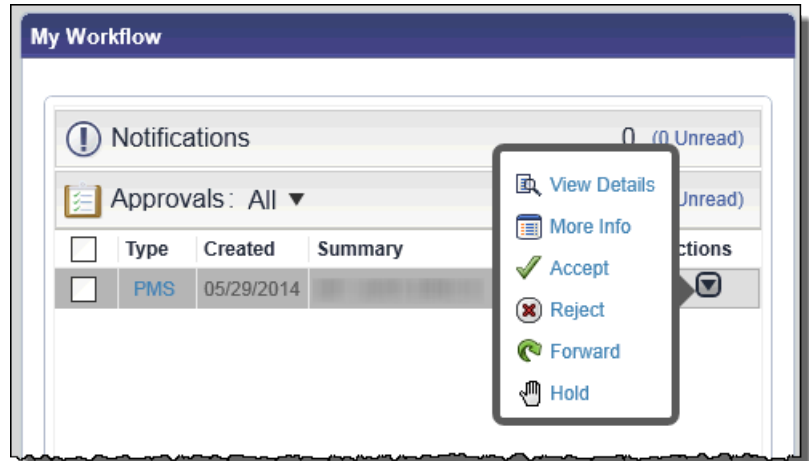
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## Approving PAFs

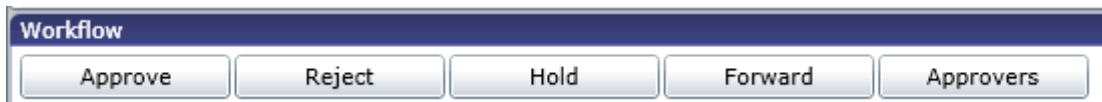
There are 5 types of Personnel Action workflows that route through departments:

- PME –Reinstate
- PML – Leave
- PMN – New Hire
- PMS – Salary/Status Change
- PMT – Termination

If you are a PAF approver, you can access the PAF from your **Workflow web part**. The Employee's number and name are displayed in the summary line. Click **More Info** to open the form.



At the bottom of the form are buttons to **Approve**, **Reject**, **Hold**, or **Forward** the PAF to another approver. The **Approvers** button will display a list of all the approvers in the workflow, and will include a history of the approvals if the item has been previously rejected.



A PAF can have 4 possible statuses, depending on where it is in the workflow:

- **N – Pending Approval.** The PAF has been created but not released into workflow.
- **X – In Progress.** The PAF has been released into workflow and does not have final approval.
- **Y – Approved.** The PAF has completed the workflow and has final approval.
- **R – Rejected.** The item has been rejected in workflow.

## To Correct and Resubmit a Rejected PAF

If your PAF is rejected by a workflow approver, you will receive an email with a message indicating why the item was rejected.

- **Search** for the PAF by the employee number or name.
- With the PAF selected, click the **Update** button.
- To access the Compressed Pending Employee Master file, click **Details**.
- Make the necessary changes, then click **Accept**.
- Click the **Release** button.
- The status will update from **R – Rejected** to **X – In Progress**.



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## Notes Required by PAF Type:

Action Code	Action Description	Reason Code	Reason Description	Comments to Enter
AP	Appointment New Hire	AP01	Hourly Appointment	Note any approvals for exceptions, step if applicable, hrly rate & org #
AP	Appointment New Hire	AP02	Regular Appointment	Pos#, note any approvals for exceptions, step, hrly rate, & special pays
EH	End of Employment Hourly	EH01	Deceased	
EH	End of Employment Hourly	EH02	Dismissed	
EH	End of Employment Hourly	EH03	End of Assignment	
EH	End of Employment Hourly	EH04	Resignation	Why? Moved, back to school, new job, etc.
EH	End of Employment Hourly	EH05	Retired PERS	
ER	End of Employment Regular	ER01	Deceased	
ER	End of Employment Regular	ER02	Dismissed	
ER	End of Employment Regular	ER03	Layoff	
ER	End of Employment Regular	ER04	Probationary Termination	
ER	End of Employment Regular	ER05	Resignation	Why? Moved, back to school, new job, etc.
ER	End of Employment Regular	ER07	Retired PERS	
ER	End of Employment Regular	ER08	Retired PERS Disability	
LV	Leave of Absence	LV01	Leave with Pay	Type of leave, medical, non-medical, etc. – do not need details
LV	Leave of Absence	LV02	Leave without Pay	Type of leave, medical, non-medical, etc. – do not need details
LV	Leave of Absence	LV03	Suspension	Length of suspension
LV	Leave of Absence	LV04	Return from Leave	Type of leave returning from
OA	Accrual Change	OA01	Override Maximum	Type is for HR use only
OM	Master Change	OM01	Name Change	Type is for HR use only
OM	Master Change	OM02	SSN Change	Type is for HR use only
RH	Rehire Hourly	RH01	Rehire as Hourly Employee	Note any approvals for exceptions, step if applicable, hrly rate & org #

# How to Enter a Personnel Action Form

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Action Code	Action Description	Reason Code	Reason Description	Comments to Enter
RR	Rehire Regular	RR01	Rehire as Regular Employee	Pos#, note any approvals for exceptions, step, hrly rate, & special pays
RR	Rehire Regular	RR02	Reinstatement <i>(This is only when an employee is being re-appointed to former position)</i>	Pos#, note any approvals for exceptions, step, hrly rate, & special pays
SH	Status Change Hourly	SH01	Longevity	New hrly rate and longevity level
SH	Status Change Hourly	SH02	Charge Number Change	New org #
SH	Status Change Hourly	SH03	Job Class Change	New job class, hourly rate
SH	Status Change Hourly	SH04	Job Class/Location Change	New job class & location #s
SH	Status Change Hourly	SH05	Location Change	New location #
SR	Status Change Regular	SR01	Acting (Out of Class)	Job class, date began acting, & hrly rate
SR	Status Change Regular	SR02	Appoint from Hourly to Regular	Pos#, job class, note any approvals for exceptions, step, hrly rate, & any special pays
SR	Status Change Regular	SR03	Demotion	New pos#, job class, step, hrly rate & any spec pays
SR	Status Change Regular	SR04	Demotion/Voluntary	New pos#, job class, step, hrly rate & any spec pays
SR	Status Change Regular	SR05	Fire Shift Change	Current shift and new shift
SR	Status Change Regular	SR06	Merit Increase	New step & hrly rate
SR	Status Change Regular	SR07	Percentage Change	New %
SR	Status Change Regular	SR08	Promotion	New pos#, job class, step & hrly rate
SR	Status Change Regular	SR09	Reclassification	New pos#, job class, step & hrly rate
SR	Status Change Regular	SR10	Return from Acting	Job class and hrly rate
SR	Status Change Regular	SR11	Special Pay	Special pay & code #
SR	Status Change Regular	SR12	Transfer of Location	New location #
SR	Status Change Regular	SR13	Y-Step	Type is for HR use only

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## What to Enter in Pending Employee Master for SR (Status or Salary Change) PAFs:

Action Code	Action Description	Reason Code	Reason Description	What to enter on Pending Master File
SH	Status Change Hourly	SH02	Charge Number Change	N/A
SH	Status Change Hourly	SH03	Job Class Change	New job class
SH	Status Change Hourly	SH04	Job Class/Location Change	New job class and location
SH	Status Change Hourly	SH05	Location Change	New location
SR	Status Change Regular	SR01	Acting (Out of Class)	N/A
SR	Status Change Regular	SR02	Appoint from Hourly to Regular	Job class#, location, BU, personnel status
SR	Status Change Regular	SR03	Demotion	Job class#, location, BU, personnel status
SR	Status Change Regular	SR04	Demotion/Voluntary	Job class#, location, BU, personnel status
SR	Status Change Regular	SR05	Fire Shift Change	N/A
SR	Status Change Regular	SR06	Merit Increase	N/A
SR	Status Change Regular	SR07	Percentage Change	N/A
SR	Status Change Regular	SR08	Promotion	Job class#, location, BU, personnel status
SR	Status Change Regular	SR09	Reclassification	Job class#, location, BU, personnel status
SR	Status Change Regular	SR10	Return from Acting	N/A
SR	Status Change Regular	SR11	Special Pay	N/A
SR	Status Change Regular	SR12	Transfer of Location	New location