# EMPLOYEE SELF SERVICE

City of Tulsa ERP Project Management Team

April 28th, 2020

# Employee Self Service

## Contents

# Employee Self Service

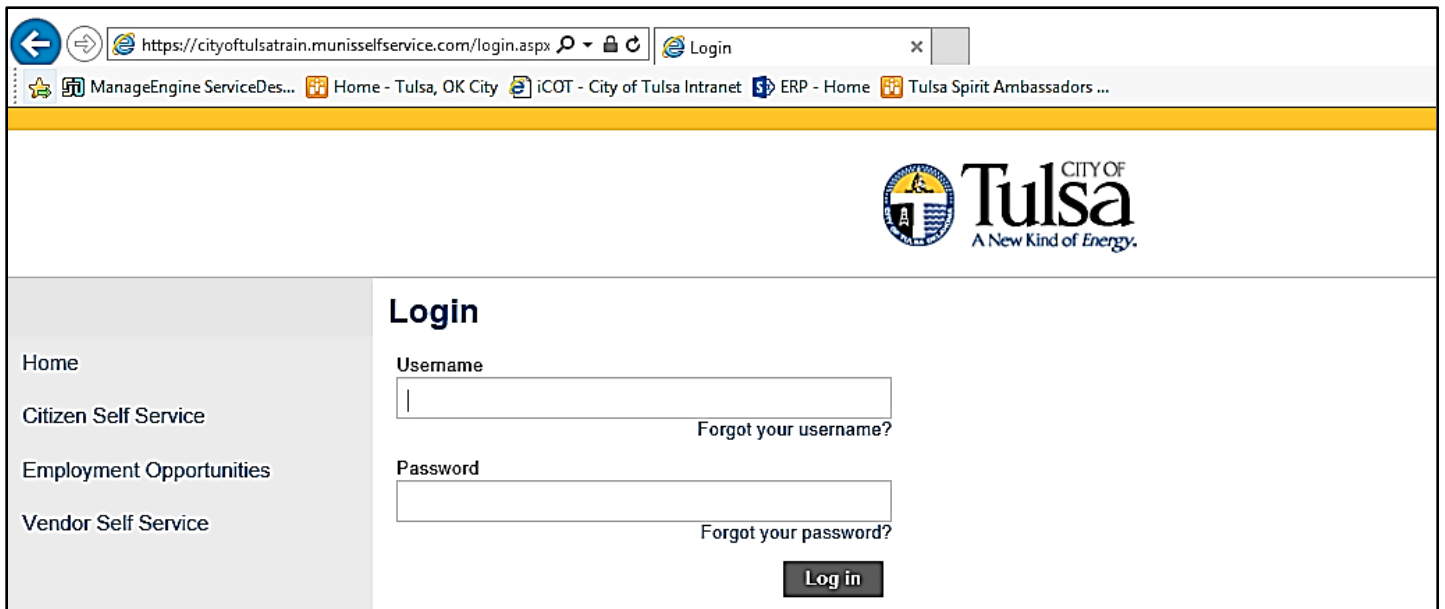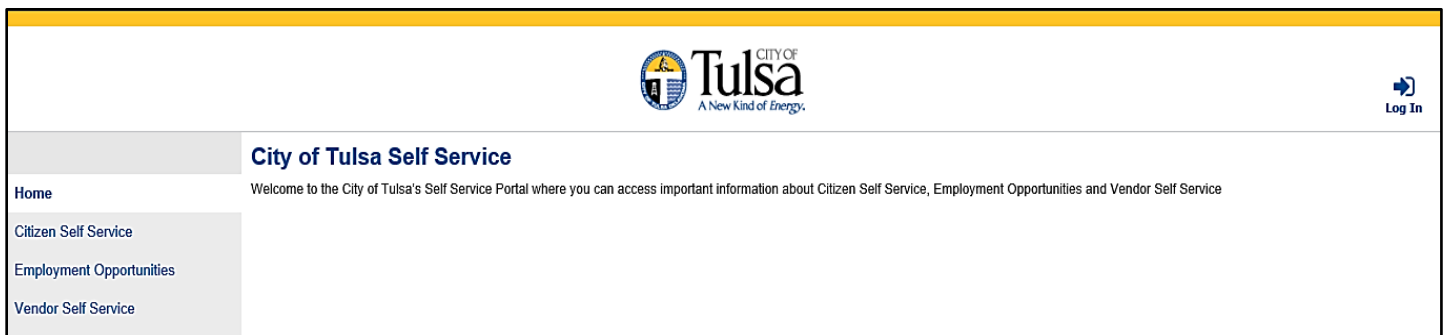Employee Self Service (ESS) is the Munis® Self Service application created specifically for current employees and job applicants. ESS accesses information from, and stores information in, the Munis HR/Payroll programs. When you update information in ESS, the updates also occur in the applicable Munis programs. **https://cityoftulsa.munisselfservice.com/default.aspx**

For employees, ESS provides access to personal information, pay and tax information, as well as training, certification, and performance information. For applicants, ESS provides information on current job opportunities, manages applicant information, and provides automatic distribution of future employment information.

Employees must have a valid MSS login to access the ESS application; registered applicants receive a personal identification number (PIN) for accessing their profile and prospective employment information.
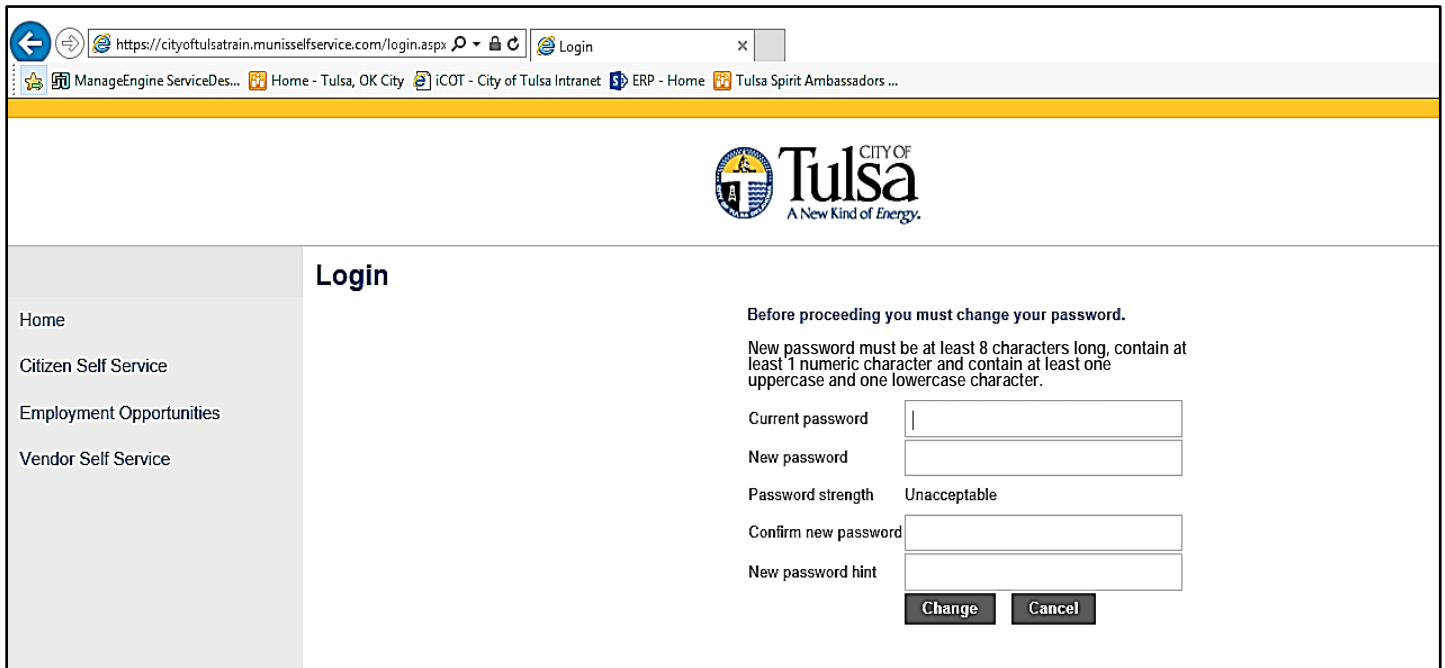
# Employee Self Service Users

The Employee Self Service application requires users to have a unique username and password. The initial log in will be the employees six-digit numeric user ID and password is the last 4 digits of their SSN.
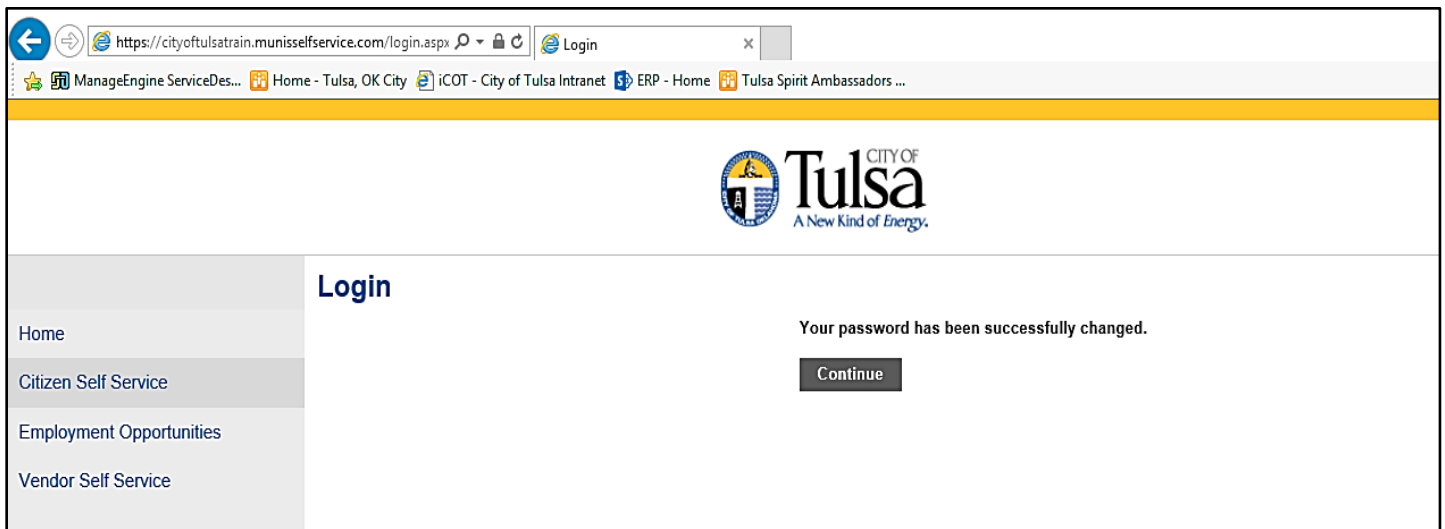
## Passwords

Password criteria is determined by your system administrator. It must be 8 characters long and must contain at least 1 numeric character and a minimum of one uppercase character. When you are provided an ESS user account, the system will require that you change your password at your first login.

When you change your password, you must enter a password that meets the password security policy. The Change Password page indicates if the new password meets the enforcement criteria.
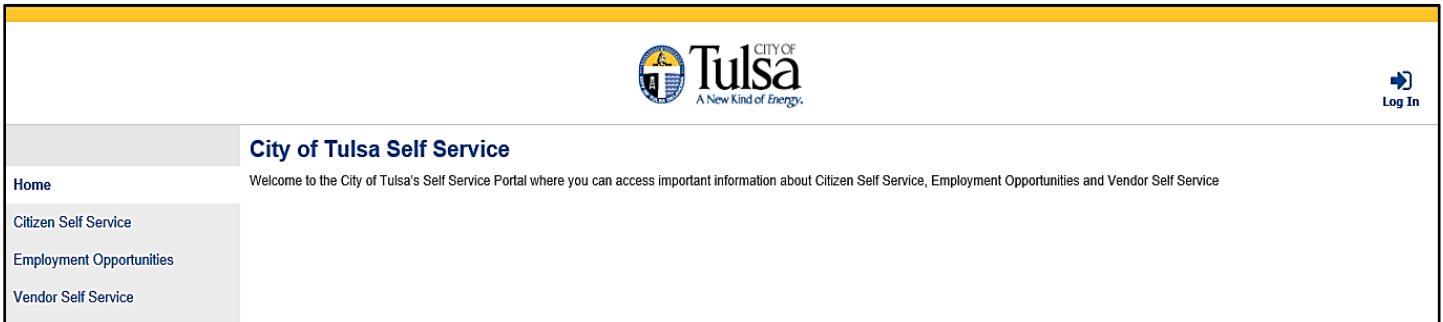


On the Change Password page, you must also enter a password hint. If you forget your password, click the **Forgot Your Password?** option on the Login page. This causes the application to send you an email message that contains your password hint. Once a user has received their password hint via email and they STILL do not know, they will need to contact their administrator.
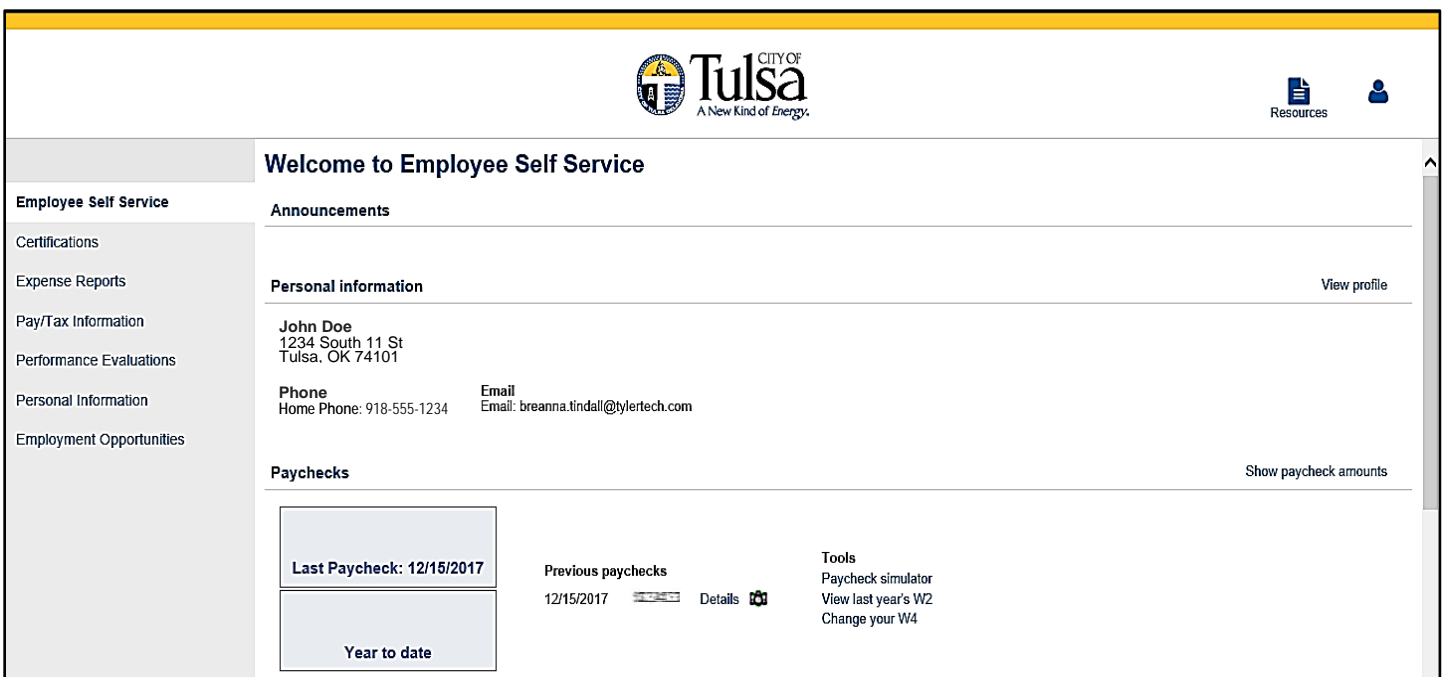
# ESS Home Page

The home page of the ESS application displays personal information, organizational announcements, and pay details.





For those sections that provide a Change or Add option, you can update or add additional information. When you do update or add information, the updates are transferred to the appropriate programs in Munis.

# Resources

Located at the very top next to your user profile information is a **Resources** Link.

＊ This button will display a list of various links or documents that an employee can access, such as insurance information and pay advice, as well as many others. Please be advised only be advices prior to 2019 (eAdvice) will be available. The advices out of Munis won't appear here in this menu.
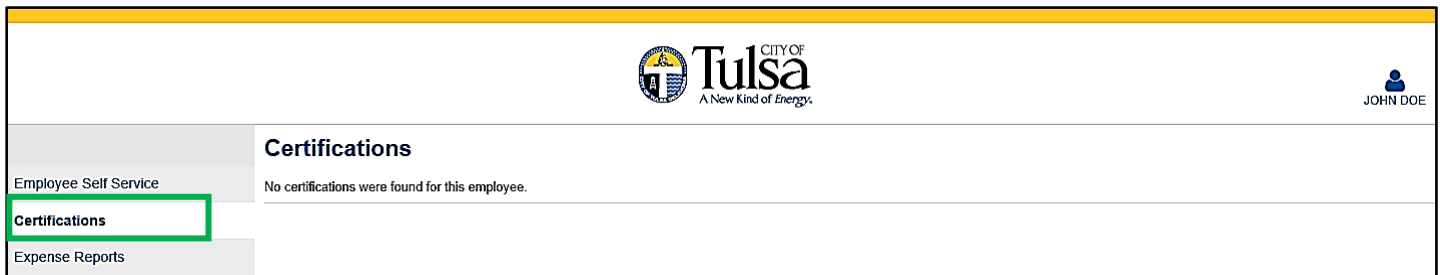


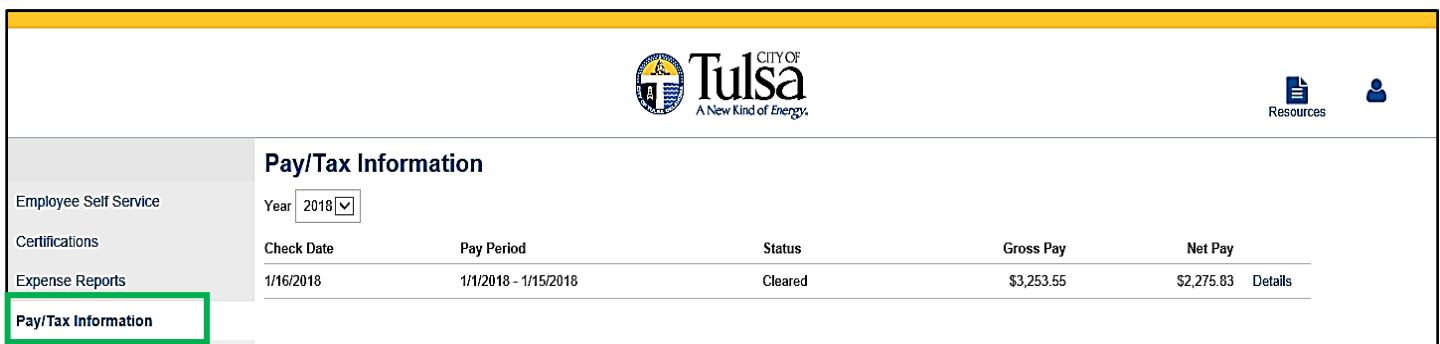## Health Insurance tab
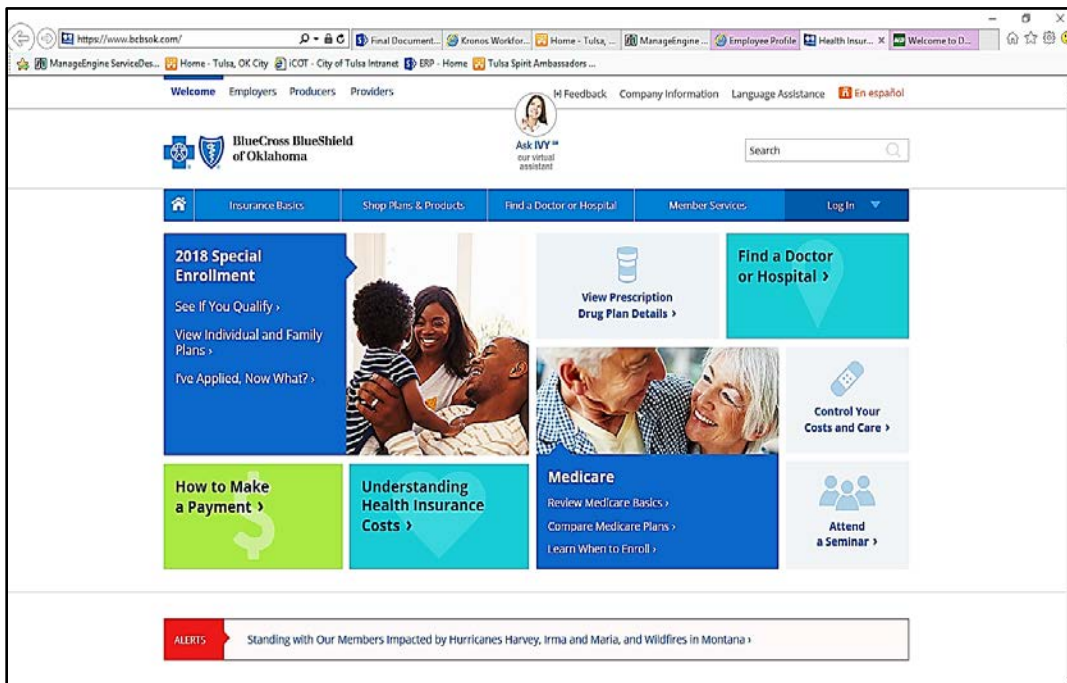


### Login page
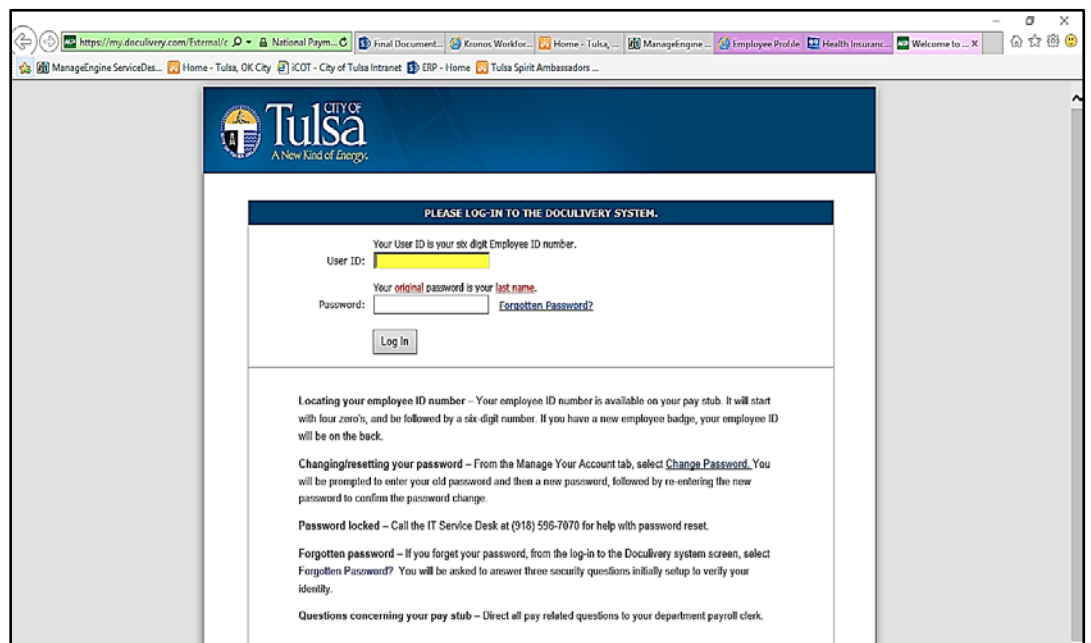
# Certifications

Certifications displays a list of your education or training certifications. This list includes the certification type, area, level, number, and effective and expiration dates. If you are a supervisor, select a name from the Employee list to view that employee's certifications.
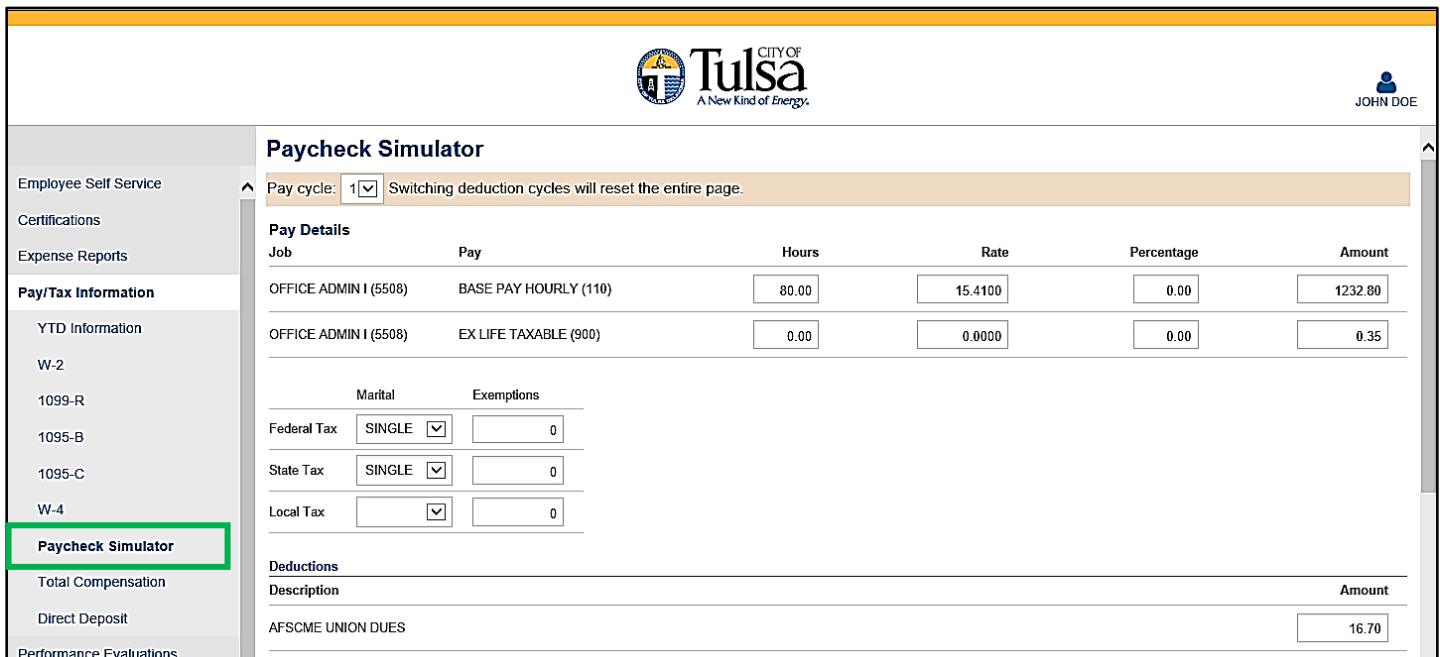


# Paychecks

The Paychecks section displays information for the most recent pay periods in which you received pay. In the Tools section, options are available for simulating your paycheck and viewing W-2 and W-4 data. For more on these functions, refer to the **Paycheck Simulator** section of this document.

## Expense Reports

Expense Reports allows you to submit expenses for reimbursement. To submit a new expense report, click **Add a New Claim**.

If existing expense reports are in process, click **ID** to view the detail page for specific details about the expense item. Click **Copy** to duplicate the expense item. There are training materials that will instruct you how to submit the expense if necessary.



## Pay/Tax Information

Pay/Tax Information provides current payroll and payroll history details. The payroll history is stored in the Munis Employee Pay History program. If you are a supervisor and you have the appropriate permissions, you can view information for any employees who report to you by selecting a name from the Employee list.
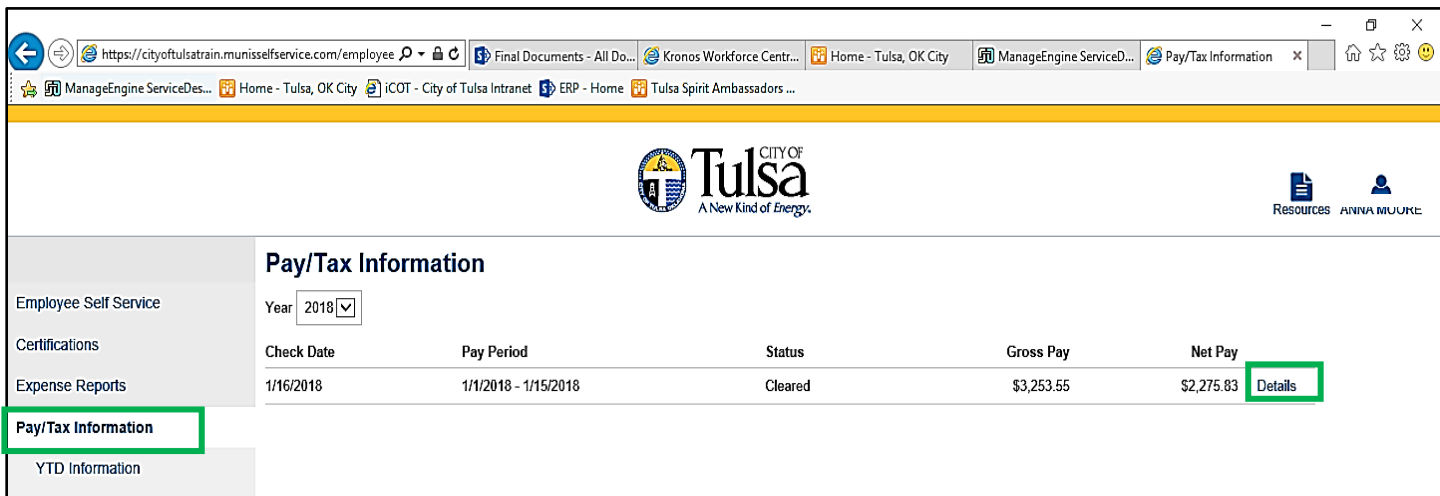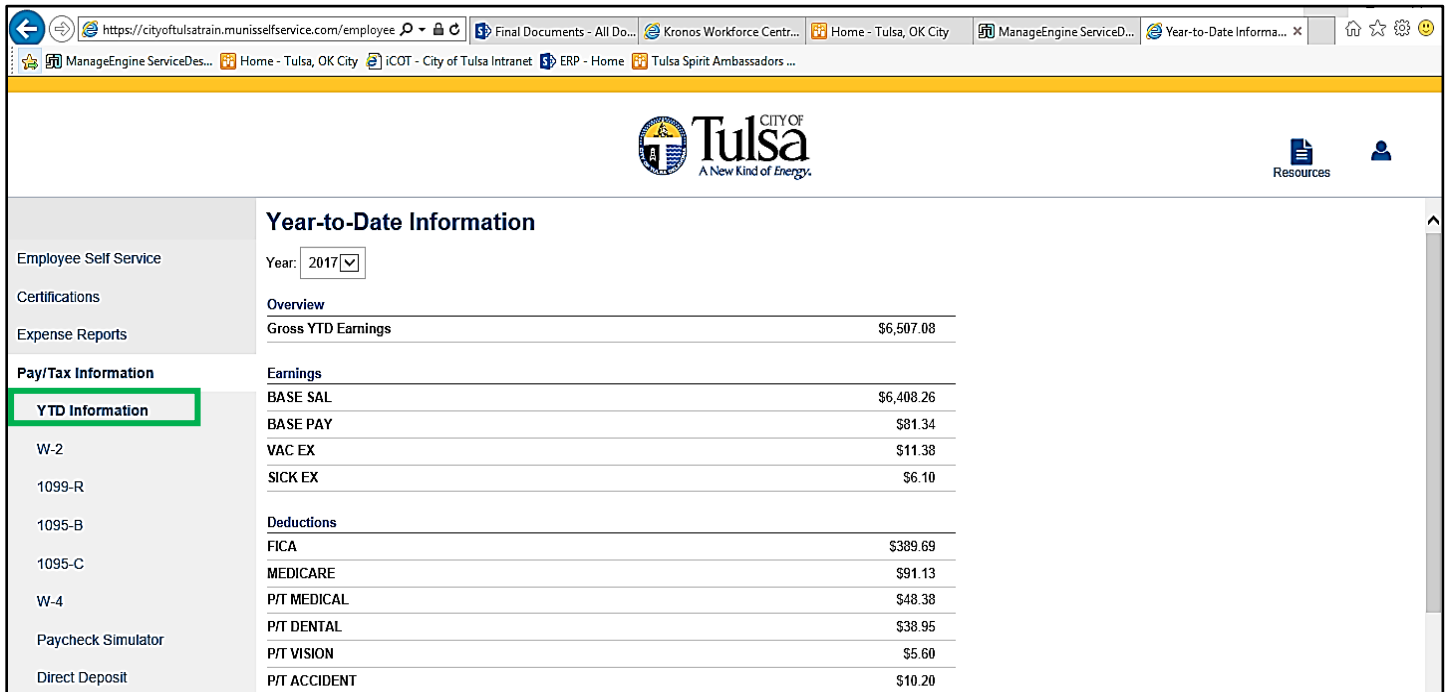


When you click **Details**, the program displays the Check Detail page, which contains the pay advice information for the check. You cannot modify pay or tax information; it is display only.

# YTD Information

The Year-to-Date Information page contains a cumulative view of payroll figures for a specific year.
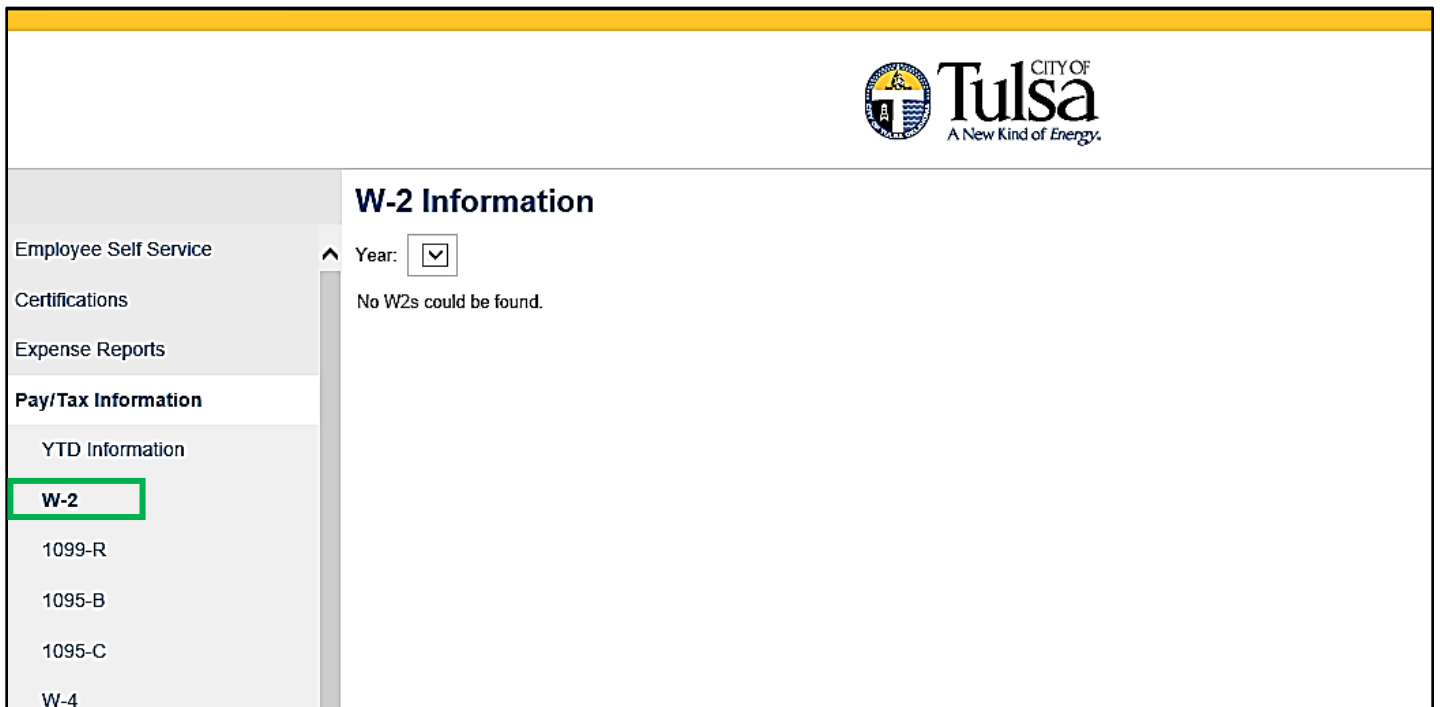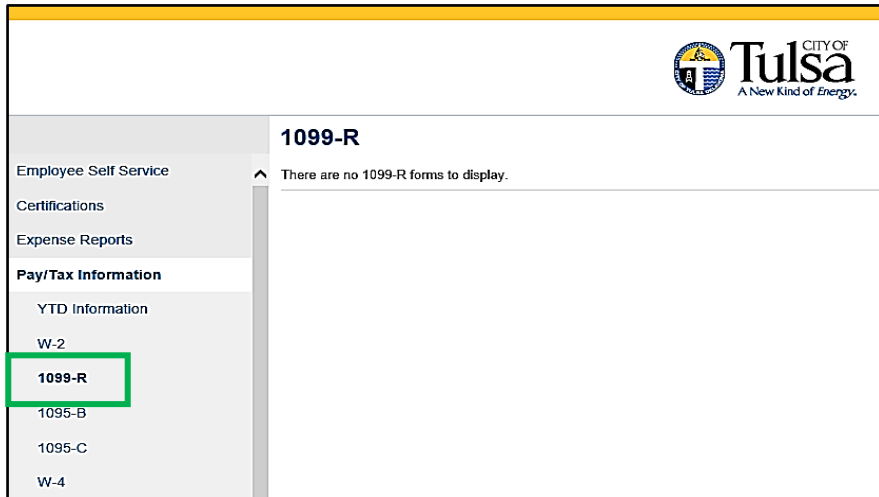


# W-2 and 1099-R

The W-2 and 1099-R pages display information regarding federal and state taxes and withholdings. This information is drawn in the Munis W-2 and 1099-R programs. To view details for a different year, select the year from the Year list.
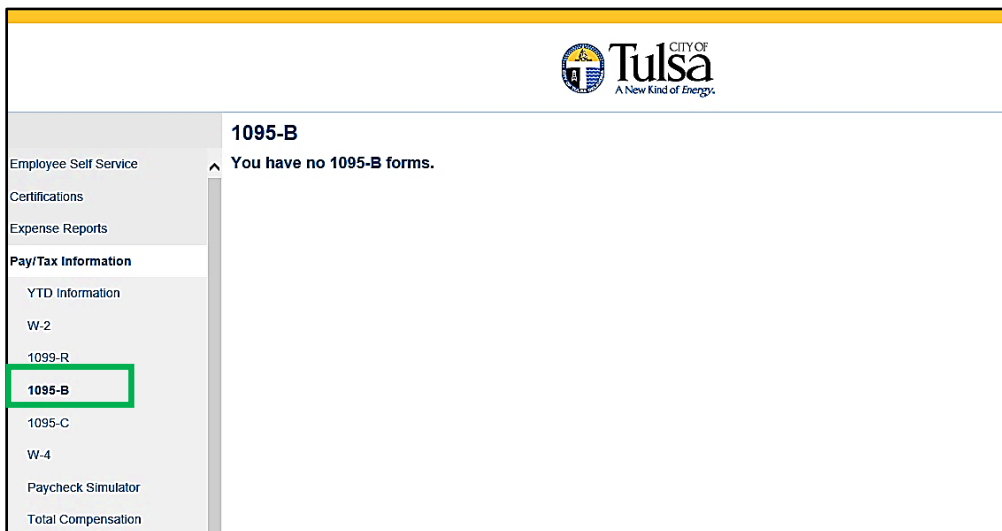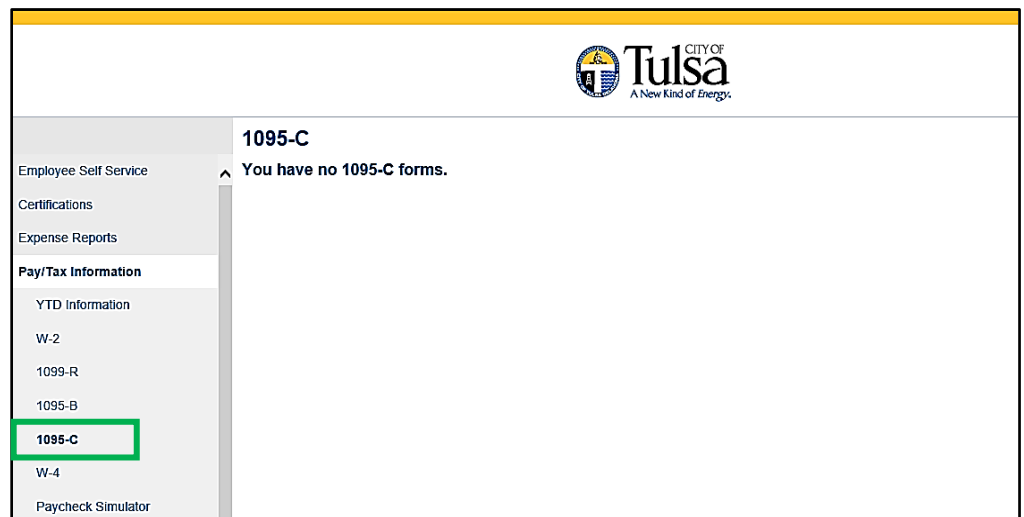
## 1095-B/C

The 1095-B/C pages display information regarding employee insurance coverage data relating to the Affordable Care Act. This information is drawn from Munis Employee 1095-B/C programs.
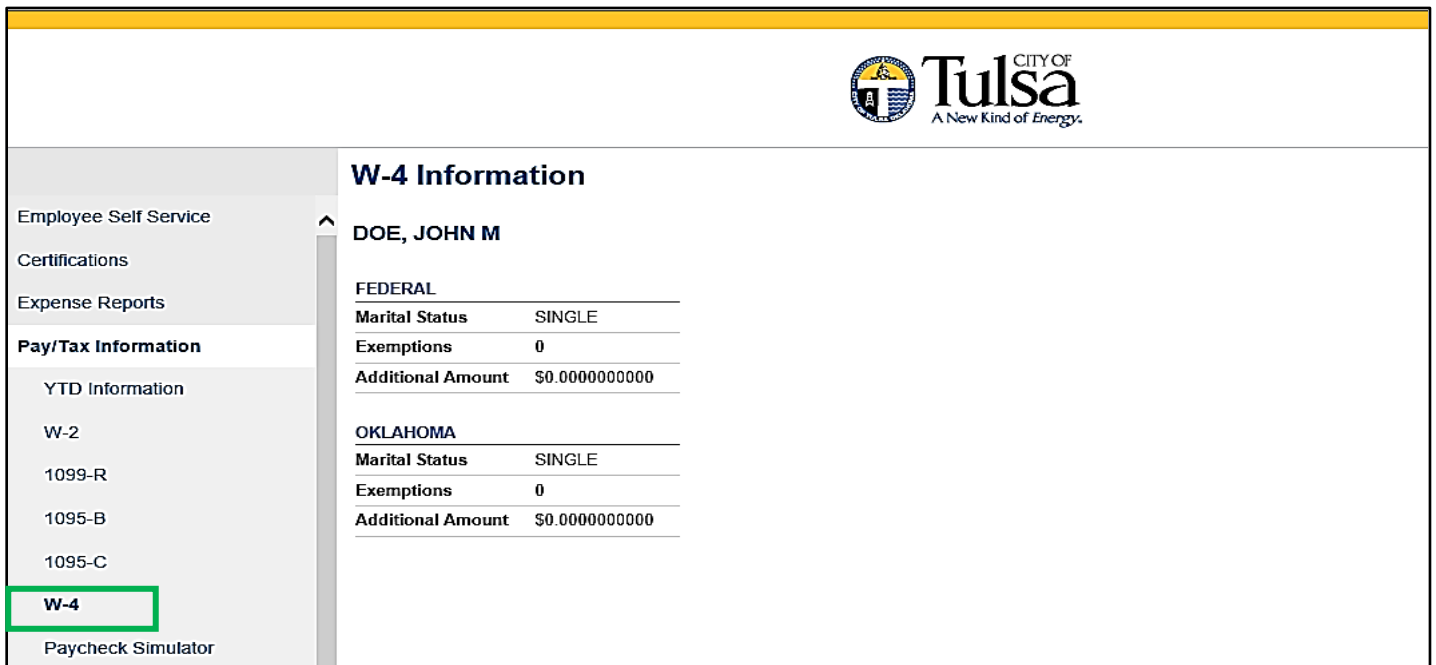
## W-4

The W-4 page displays information related to your W-4.
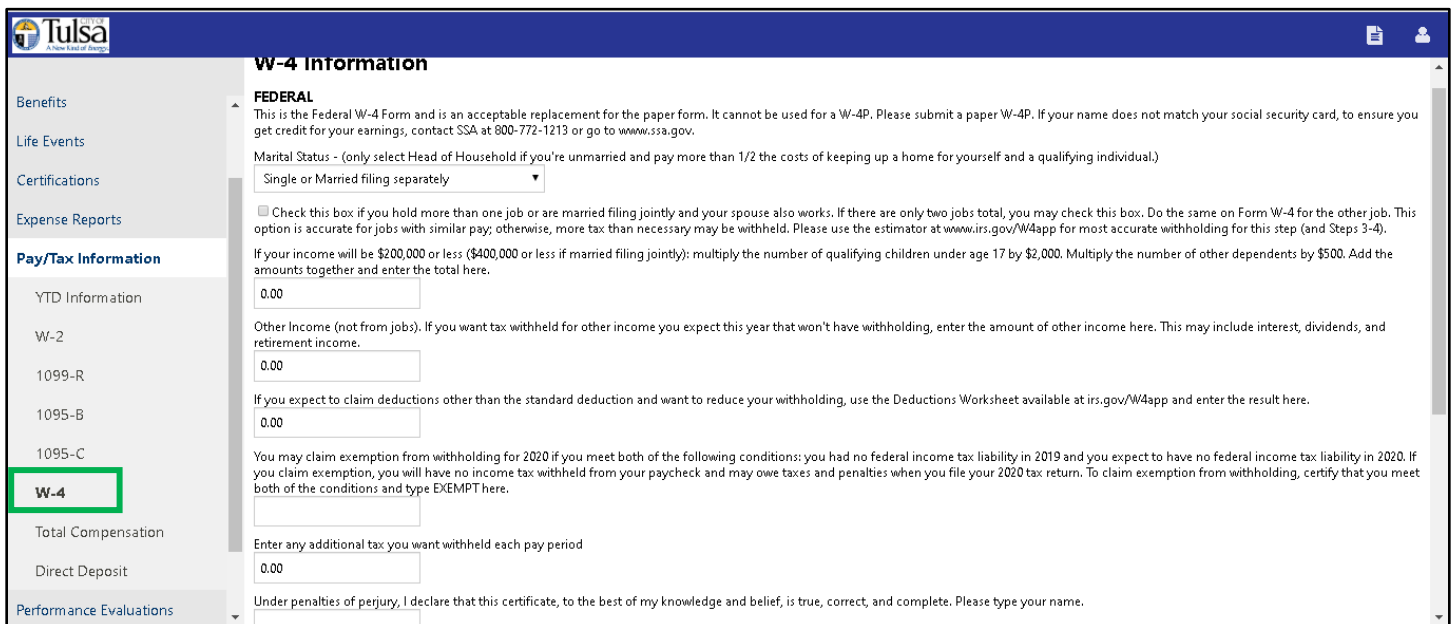


## Change Your W-4

**1.** To update W-4 Information, Click **Edit W-4 Values**. The program displays the Edit W-4 page.



**2.** Enter the revised data

Verify that the information is correct by typing your name in the box and then click **Continue**. The program displays a review page.

3. Review your data to ensure accuracy and click **Submit**. The program displays a confirmation page.

   Payroll will review the requested changes and employee will be notified of approval. Changes need to be submitted by Monday 8am CST in order for it to take effect that pay period, otherwise it will take affect the following pay period.

## Direct Deposit

The Direct Deposit page provides the details for your direct deposit accounts. You can update the accounts and amounts allotted to each account using the ESS Direct Deposit page. You can only add one new account at a time. Once approved by payroll, you can add another if necessary.



To modify your direct deposit information:

1. Click the **Change** option for the account. The program displays the Edit Direct Deposit Net dialog box.

**Edit DIRECT DEPOSIT NET**

| | |
|---|---|
| Bank routing number or bank name | 111000025 |
| Bank account type | Checking |
| Bank account number | 124775274 ✕ |
| Percentage | 100 |

**OK**   **Cancel**

**2.** Update the information and click **OK**.

**3.** To deposit amounts to more than one account:

Click the **Add a Percentage-Based Account** option.

**Direct Deposit Accounts**

The primary account is used for funds that are not disbursed to secondary percentage-based or amount-based accounts. If you wish to receive a check instead, you can delete the primary account.

**Primary account**

| Bank | Account type | Account number | Prenote | Active | Percentage | |
|---|---|---|---|---|---|---|
| BANK OF AMERICA, N.A. | Checking | | No | Yes | 90.0000000000% | Change \| Delete |

**Percentage-based accounts**                                                                                  Add a percentage-based account

| Bank | Account type | Account number | Prenote | Active | Percentage | |
|---|---|---|---|---|---|---|
| BANK OF AMERICA, N.A. | Savings | | No | Yes | 10.0000000000% | Change \| Delete |

**Amount-based accounts**                                                                                  Add an amount-based account

You have no amount-based accounts for direct deposit.

The program displays the Add a New Account dialog box.

**Add a new account**

| | |
|---|---|
| Bank routing number or bank name | 111000025 |
| Bank account type | Savings |
| Bank account number | 12311245 |
| Percentage | 50 |

**OK**   **Cancel**

**4.** Enter the new account details, establish the percentage of the total deposit to be allotted to this account, and click **OK**. The program accepts the new account and adjusts the percentage to the existing account so that the total deposit amount remains at 100%. Also, approvals will be reviewed the Friday prior to the pay period start, therefore must take affect the Friday prior; otherwise the request will be processed the following pay period.

## Direct Deposit Accounts

The primary account is used for funds that are not disbursed to secondary percentage-based or amount-based accounts. If you wish to receive a check instead, you can delete the primary account.

**Primary account**

| Bank | Account type | Account number | Prenote | Active | Percentage | |
|------|-------------|----------------|---------|--------|-----------|---|
| BANK OF AMERICA, N.A. | Checking | | No | Yes | 90.0000000000% | Change \| Delete |

**Percentage-based accounts**     Add a percentage-based account

| Bank | Account type | Account number | Prenote | Active | Percentage | |
|------|-------------|----------------|---------|--------|-----------|---|
| BANK OF AMERICA, N.A. | Savings | | No | Yes | 10.0000000000% | Change \| Delete |

**5.** When you click Submit Changes, the program submits the changes to your Human Resources department for approval. Once they are approved, the changes are effective to the next payroll cycle.

## Direct Deposit Accounts

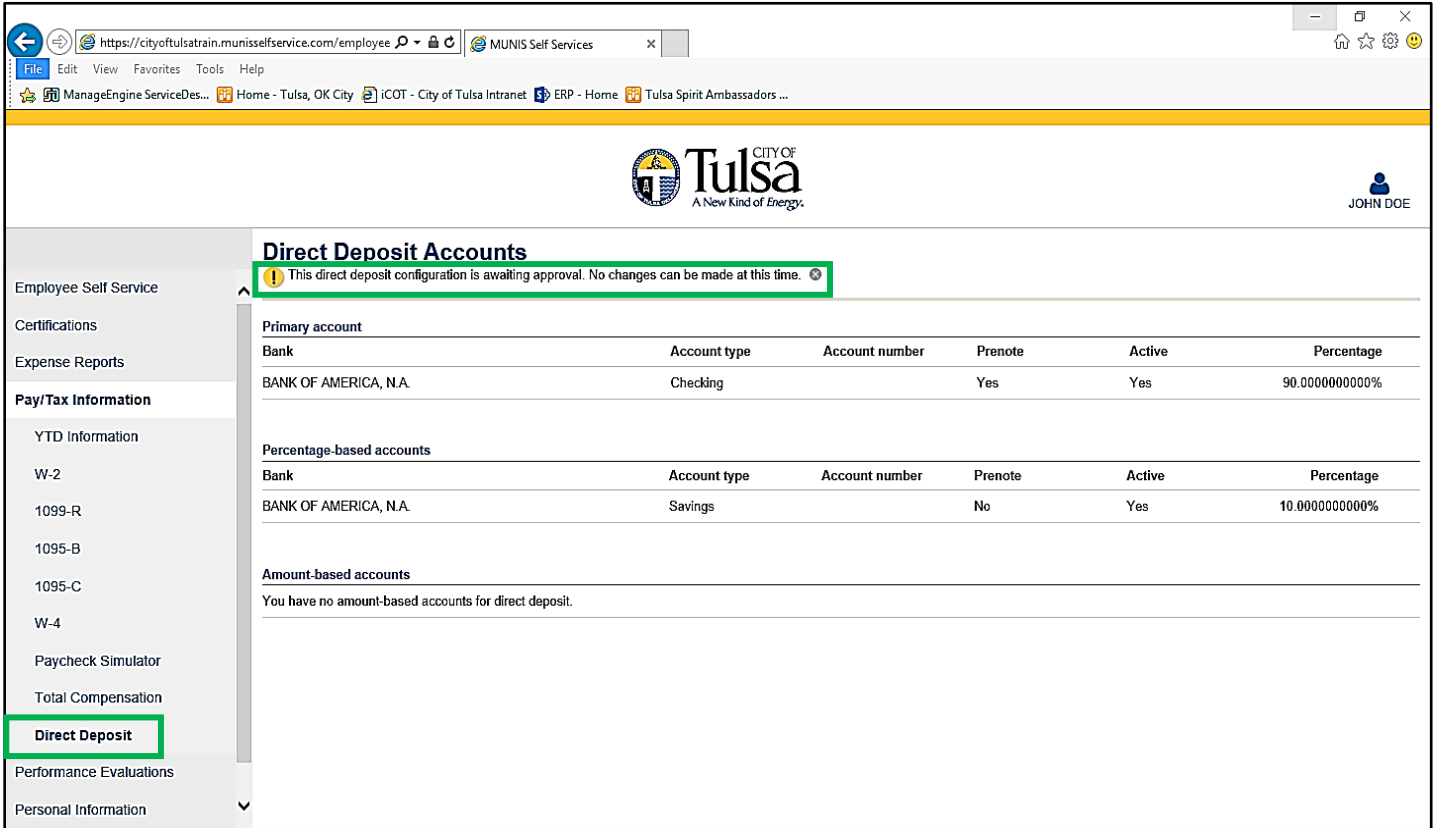✓ Your new direct deposit information has been successfully submitted for approval. ⊗

**Primary account**

| Bank | Account type | Account number | Prenote | Active | Percentage |
|------|-------------|----------------|---------|--------|-----------|
| BANK OF AMERICA, N.A. | Checking | | No | Yes | 90.0000000000% |

**Percentage-based accounts**

| Bank | Account type | Account number | Prenote | Active | Percentage |
|------|-------------|----------------|---------|--------|-----------|
| BANK OF AMERICA, N.A. | Savings | | No | Yes | 10.0000000000% |

*You cannot make additional changes until these changes have been approved.*
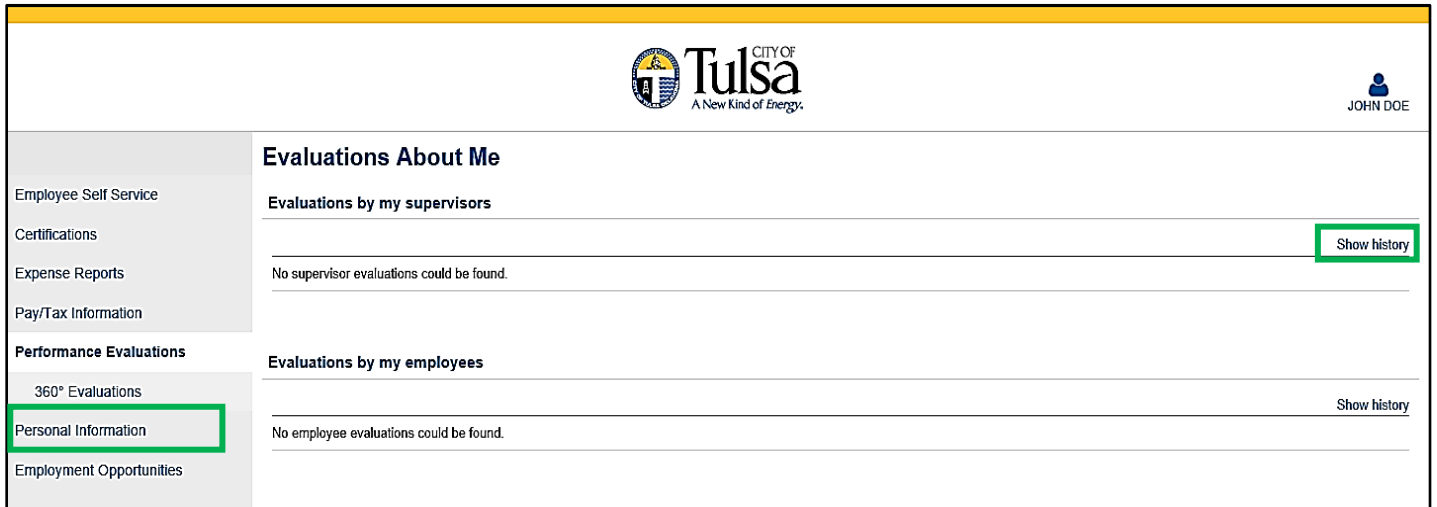
## Performance Evaluations

The Performance Evaluations group on the menu provides access to all evaluation functionality. You can view evaluations you have received and given. If you are a supervisor, you can view evaluations your employees have received. Additional user guides are available on how to submit employee PRR's. With the appropriate permissions, you can also create evaluations. For evaluations to be available in Employee Self Service, the Post Online check box must be selected in the Munis Employee Evaluations program.

The Performance Evaluations option displays the Evaluations About Me page, which lists evaluations that have you have received. The evaluations are grouped according to who performed them: your supervisors, your peers, your employees, and yourself.

To view more evaluations of any type, click **Show History**.

## Employee Evaluations

If you are a supervisor, you can use Employee Self Service to manage evaluations given to your employees

Click the Employee Evaluations option on the ESS menu to display the Employee Evaluations page. This page provides a list of evaluations given to your employees, grouped according to who performed them.

# 360° Evaluations

The 360° Evaluations page lists all the evaluations you have given, grouped by recipient.



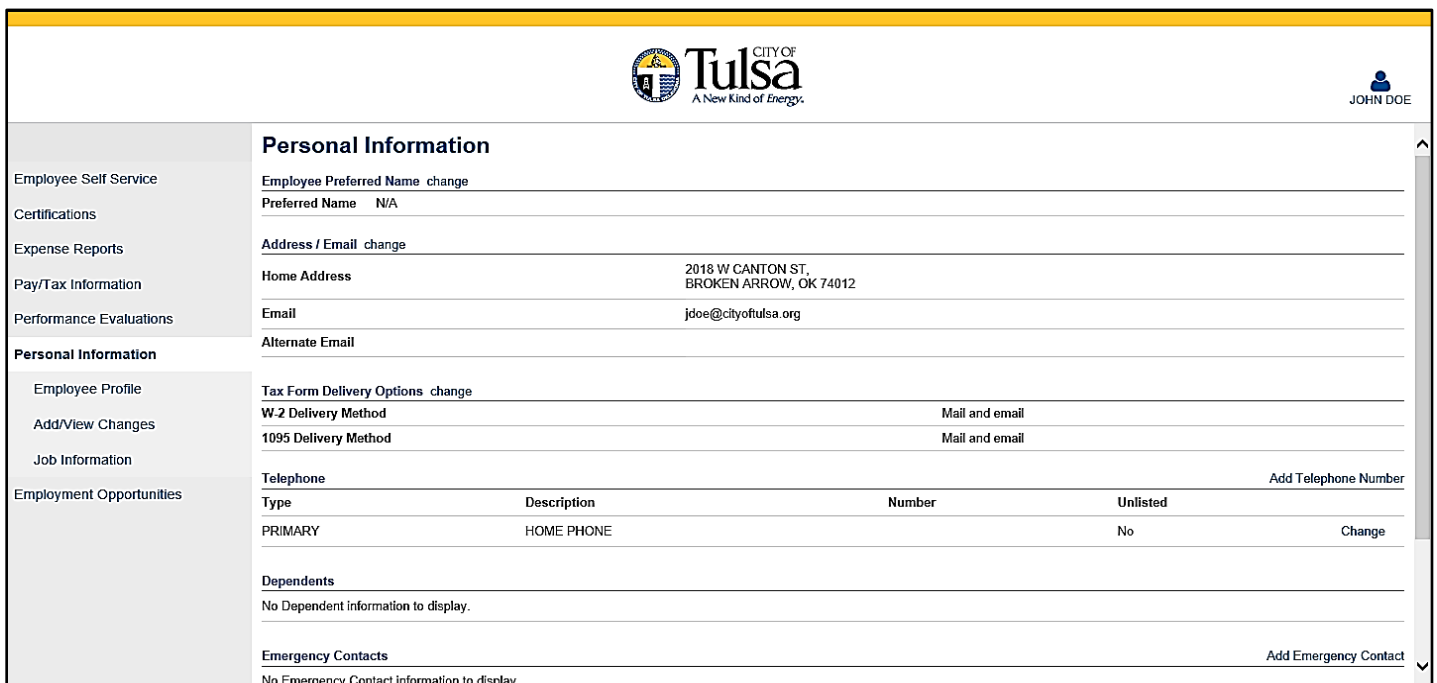If you have existing evaluations, use the Show History/Show Current link to toggle the view.

# Personal Information

The Personal Information page displays your contact information, as well as dependent information and emergency contacts. A system administrator may restrict the ability to update information on this page. This restriction is established in Employee Self Service–Administration.

The information found under Personal Information and Employee Profile is located in the Munis Employee Master program. When you change any of the information on these pages, the corresponding Employee Master record is updated.



According to permissions granted in ESS–Employee Administration, you can add or update personal information, including dependents, and emergency contacts.
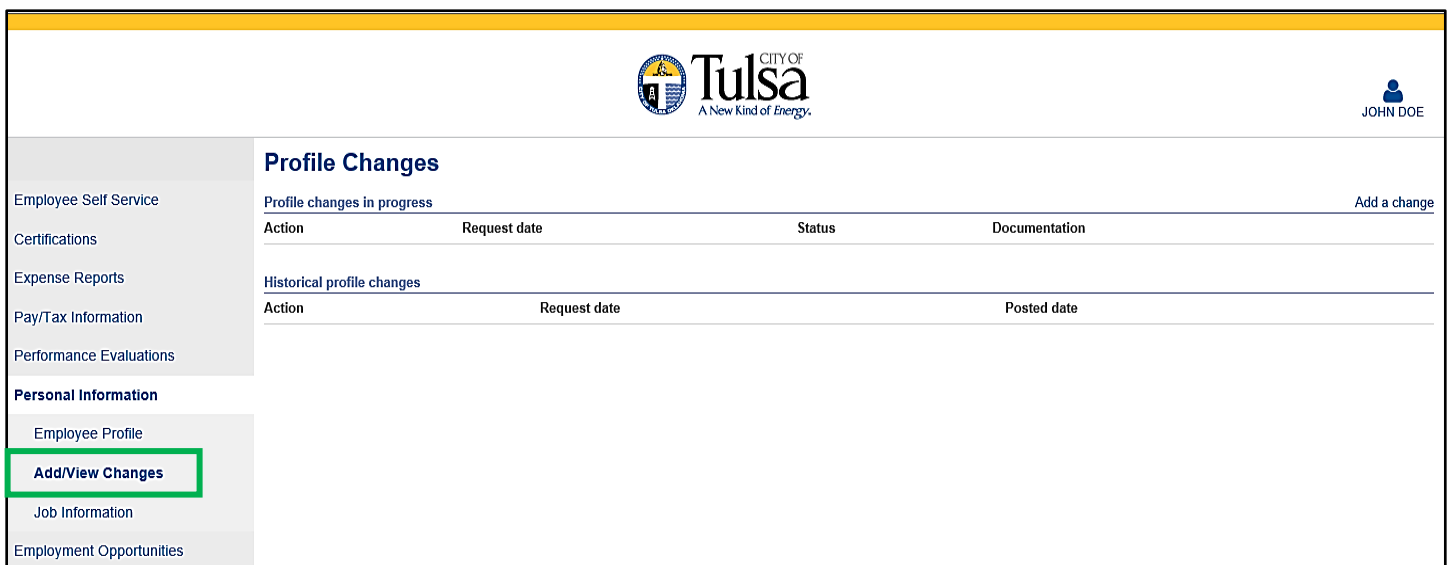
# Employee Profile

The Employee Profile page displays general and demographic information, such as hire date and date of birth, as well as race and ethnicity information. If you are a supervisor, and you have the appropriate permissions, you can view profiles of employees who report to you by selecting a name from the Employee list; otherwise, the Employee list is not available, and the page displays your profile. The Employment Opportunities option displays on the MSS Home page and is accessible without a username and password.
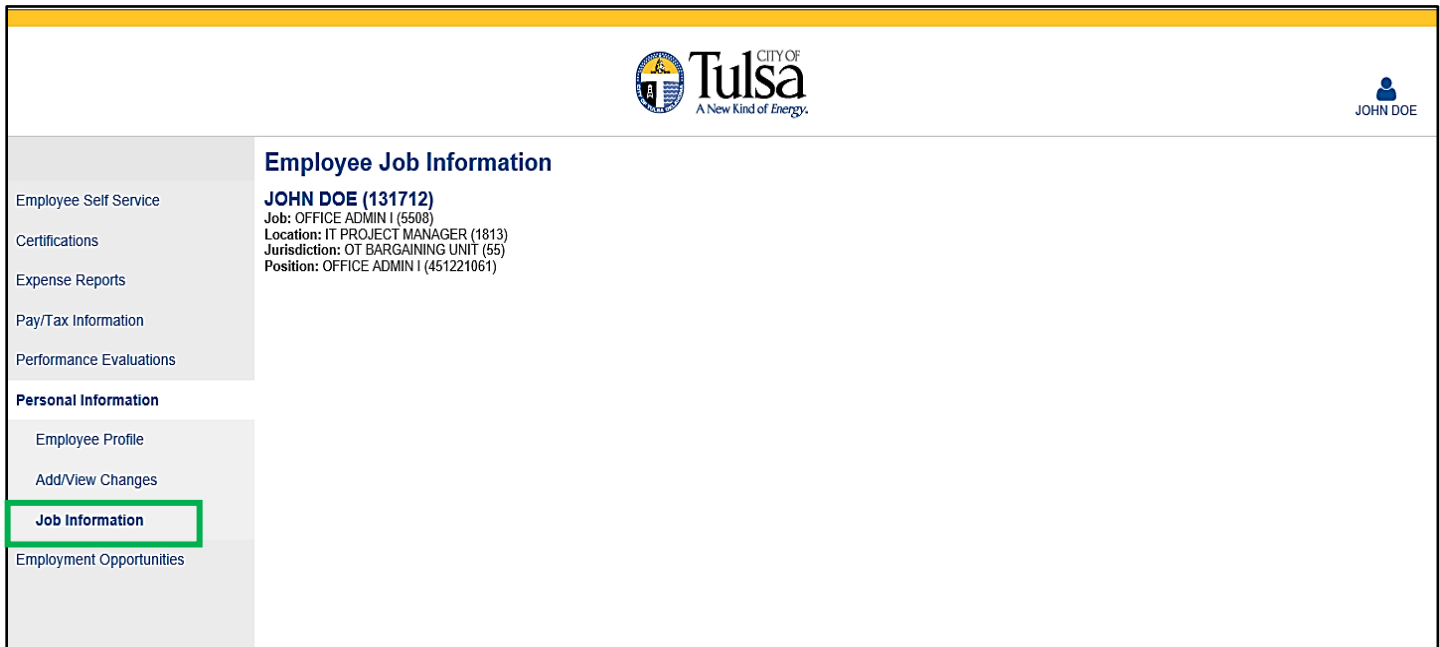


# Add/View Changes

The Add/View Changes option is available on the Personal Information menu. When you select this option, the page refreshes to display the Profile Changes screen. Click Add a Change to update your profile details.

# Job Information

You can view details regarding your current job.



Information displayed includes your job title, location, jurisdiction (group bargaining unit), and position. Years of service details, which are drawn from the Munis Employee Years of Service program, are provided.

# Employment Opportunities (Applicant Tracking)

Employment Opportunities is the Munis Self Service interface for Munis Applicant Tracking. It is considered a part of ESS; however, the Employment Opportunities option displays on the MSS Home page and is accessible without a username and password.
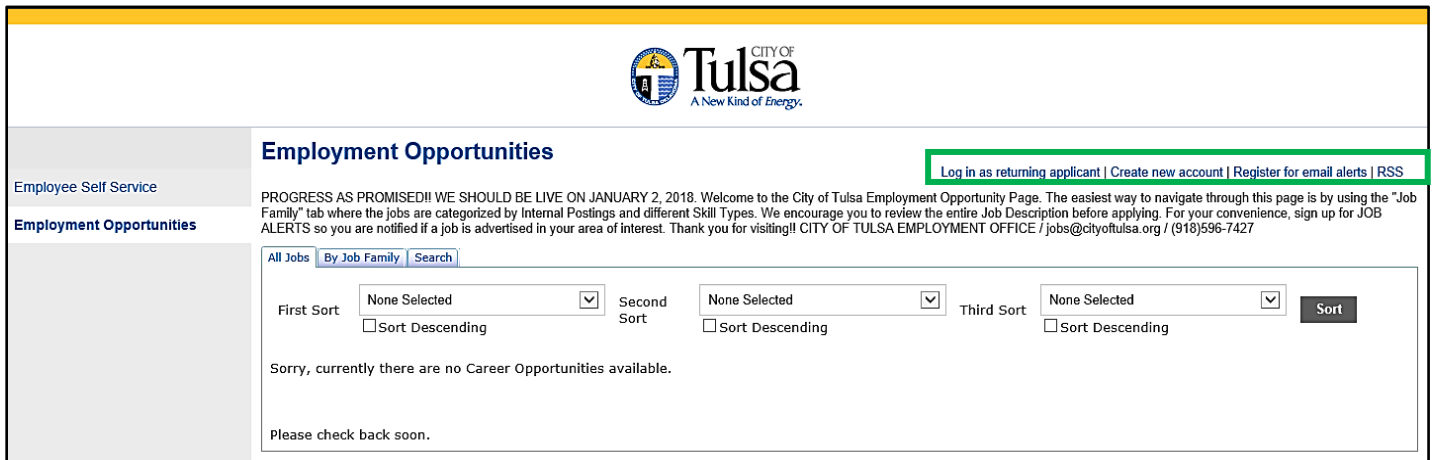
Employment Opportunities provides job openings for your organization. Using this feature, job applicants can view available jobs and apply for one or more jobs directly from the Employment Opportunities page. Your organization builds job applications using the Self-Service Application program within Munis Applicant Tracking.

In addition to applying for positions, applicants can request to receive regular updates for job openings according to job categories.

When an applicant registers for an account, the program stores all of his or her information in the Munis database. Returning applicants do not have to re-enter information each time they apply for a job; however, they can update their applicant information to tailor it to a specific job or to add updated information.

If applicants use the Internet Rich Site Summary (RSS) application, they can click RSS to subscribe to an RSS feed for employment opportunities, or they can click Register for Email Alerts to get automatic updates regarding opportunities.
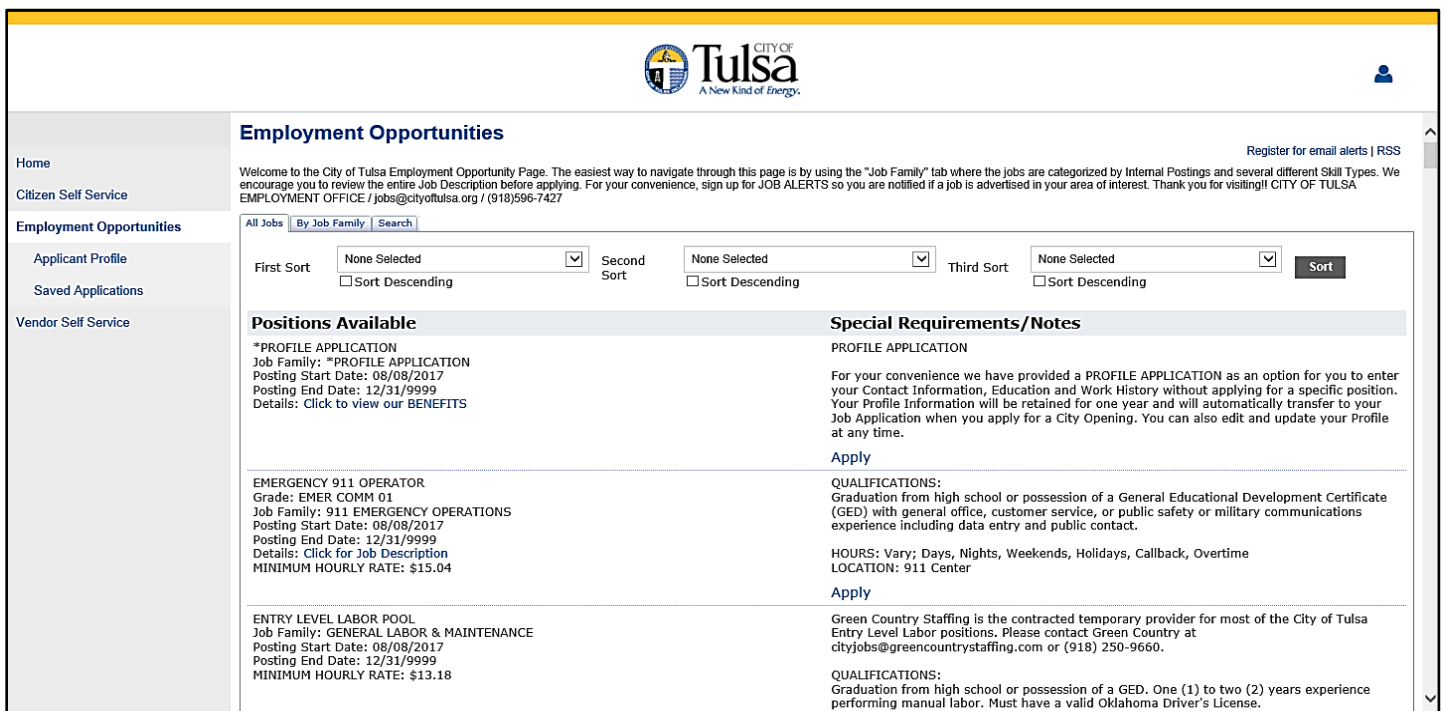
When logged into Employee Self Service, you may view available positions by clicking on Employment Opportunities. You will need to either Log in as a returning applicant or create a new account to view open positions **prior to logging into Employee Self Service.**



The Employment Opportunities page displays the All Jobs tab as the default view. This tab provides three Sort By lists, which allow applicants to sort the available positions in various orders. The first list determines the primary sort field, the second list determines the secondary sort field, and so on.

Once you are logged in or created your account, you will be able to see the available positions, as well as your Applicant Profile and any Saved Applications.