EMPLOYEE SELF SERVICE
USER GUIDE

City of Tulsa ERP Project Management Team

January 5, 2018

Employee Self Service

Contents

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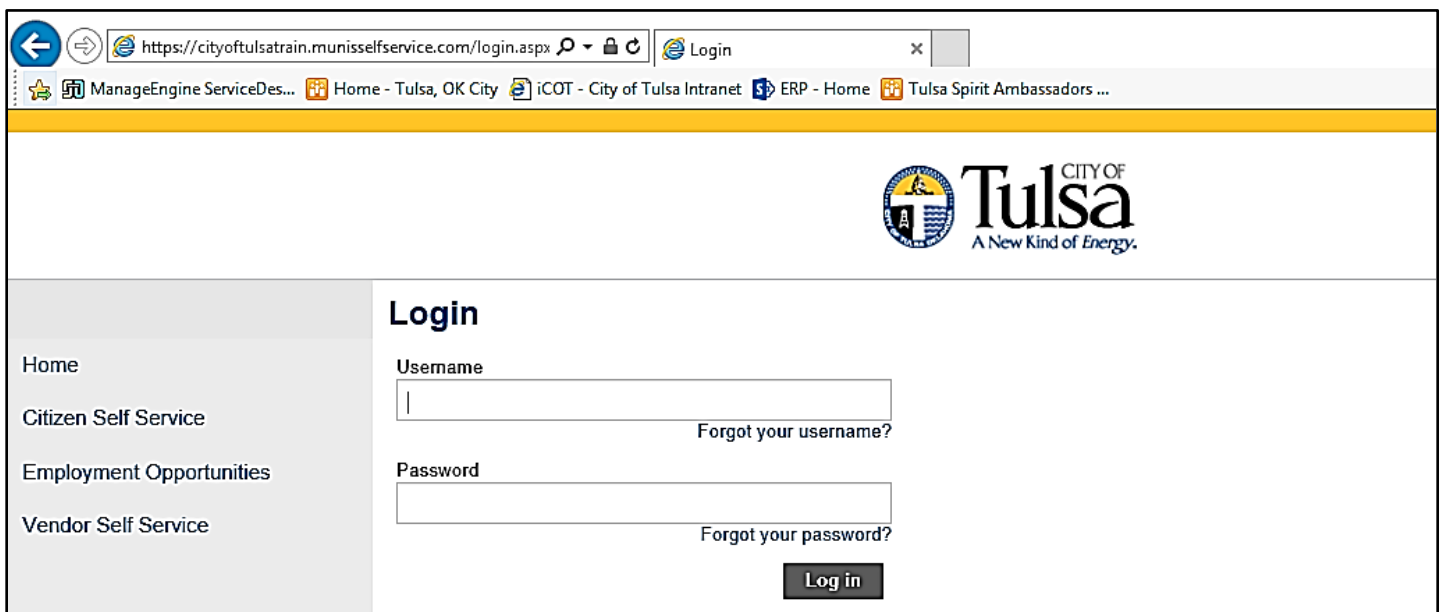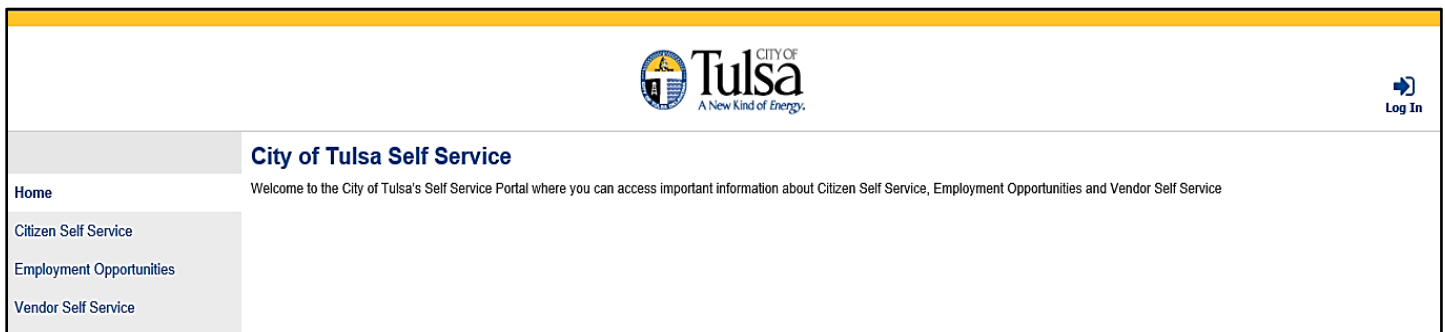
Employee Self Service (ESS) is the Munis® Self Service application created specifically for current employees, retirees and job applicants. ESS accesses information from, and stores information in, the Munis HR/Payroll programs. When you update information in ESS, the updates also occur in the applicable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

For employees, ESS provides access to personal information, pay and tax information, as well as certification, and performance information.

Employees must have a valid MSS login to access the ESS application.
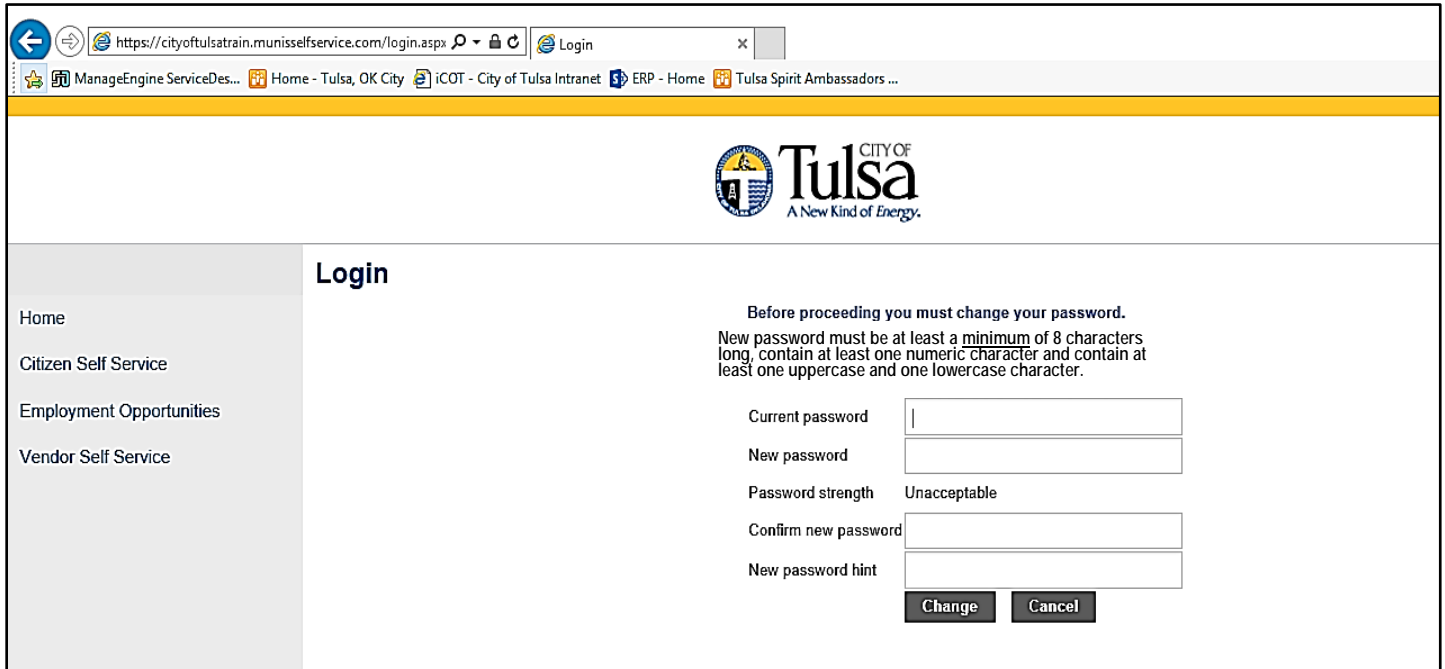

Employee Self Service Users

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 four digits of their SSN.

Passwords

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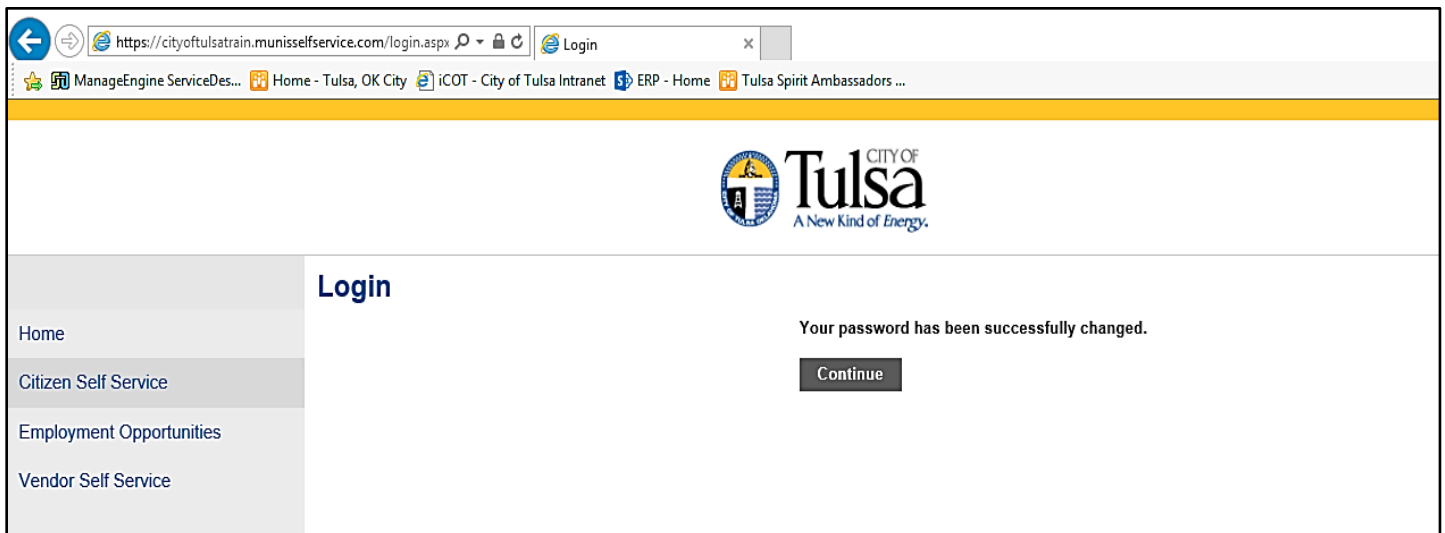
When you are provided an ESS user account, the system will require that you change your password at your first login.

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, a mobile scanning code 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.
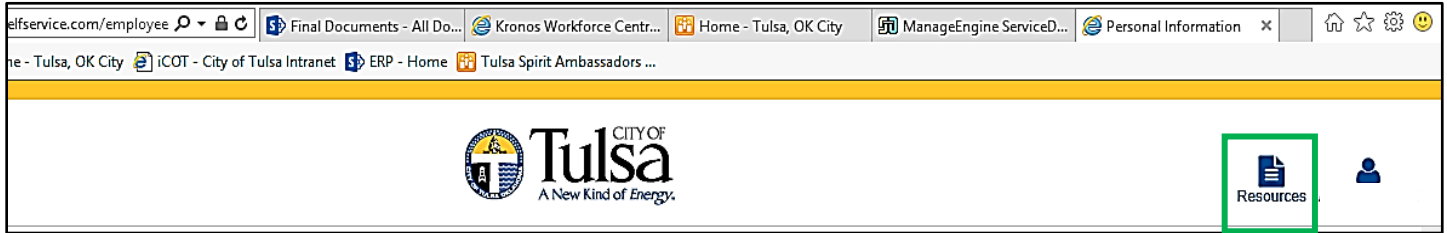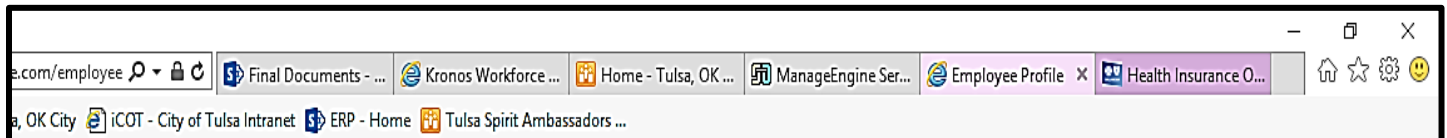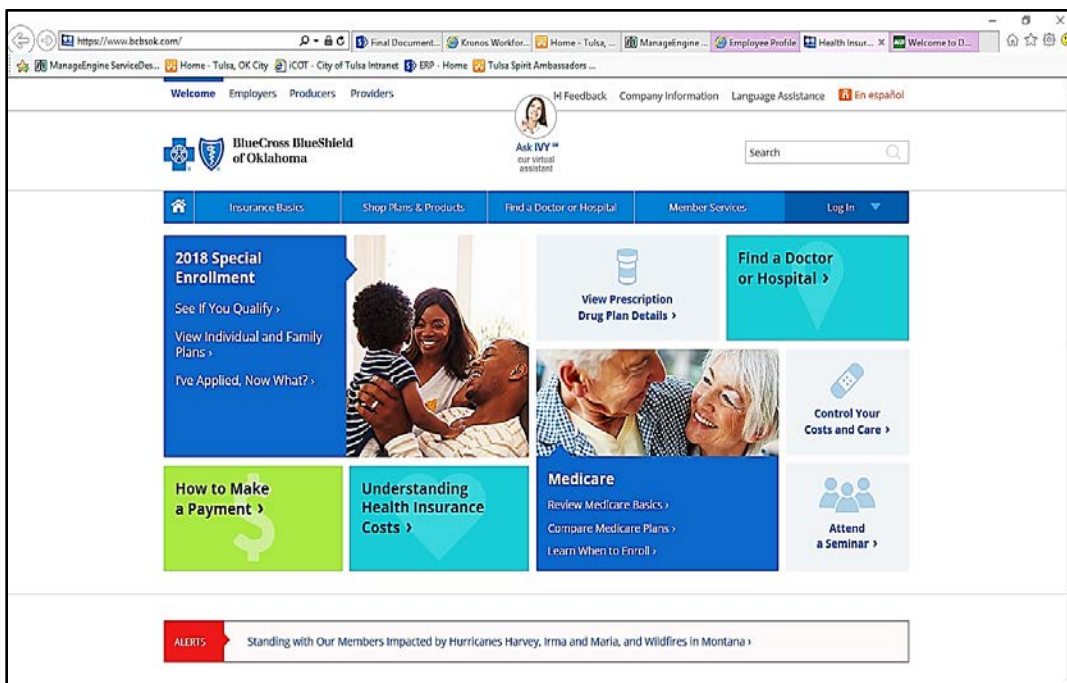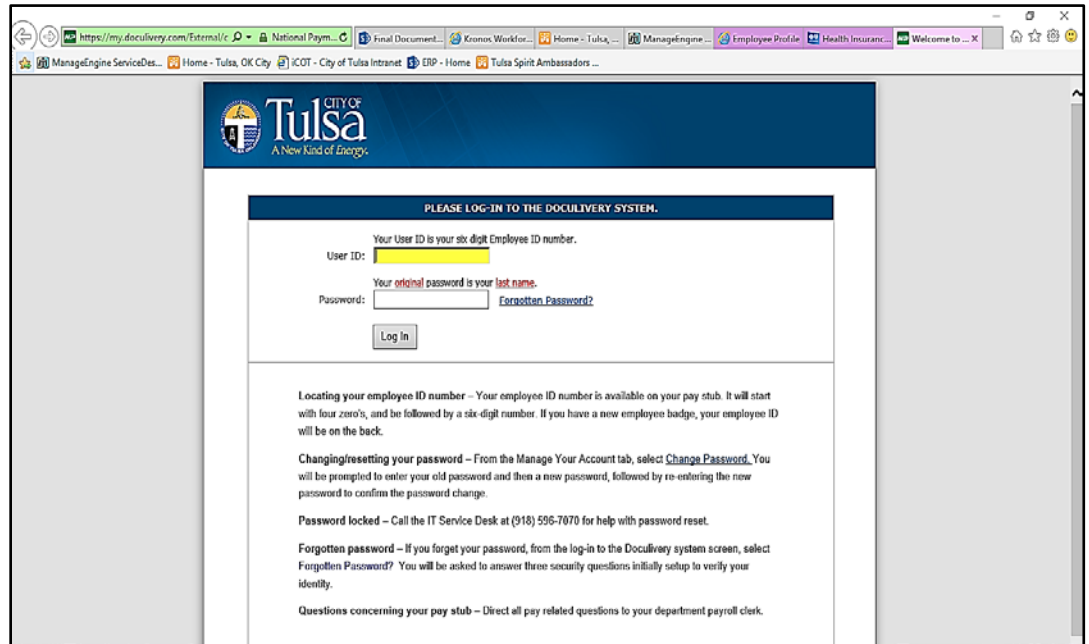
* This button will display a list of various links or documents that an employee can access, such as insurance information and pay advice, as well as many others. Please be advised the eAdvice link will only get you information prior to 2018. Current Payroll advice will be located under the **Pay/Tax** Section.

Health Insurance page

eAdvice Login page

Certifications

Certifications displays a list of your Certifications and or Licenses. 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.
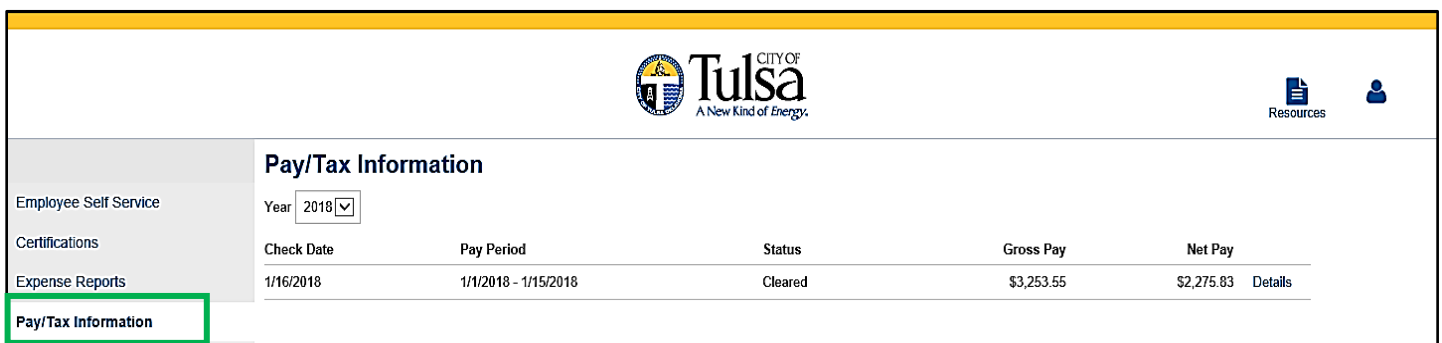
Paychecks

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.

* Coming soon

Expense Reports

Expense Reports allows you to submit <u>non travel</u> 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. If necessary, there are training materials that will instruct you how to submit the expense.

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 have the appropriate permissions, you can view information for any employees who report to you by selecting a name from the Employee list.

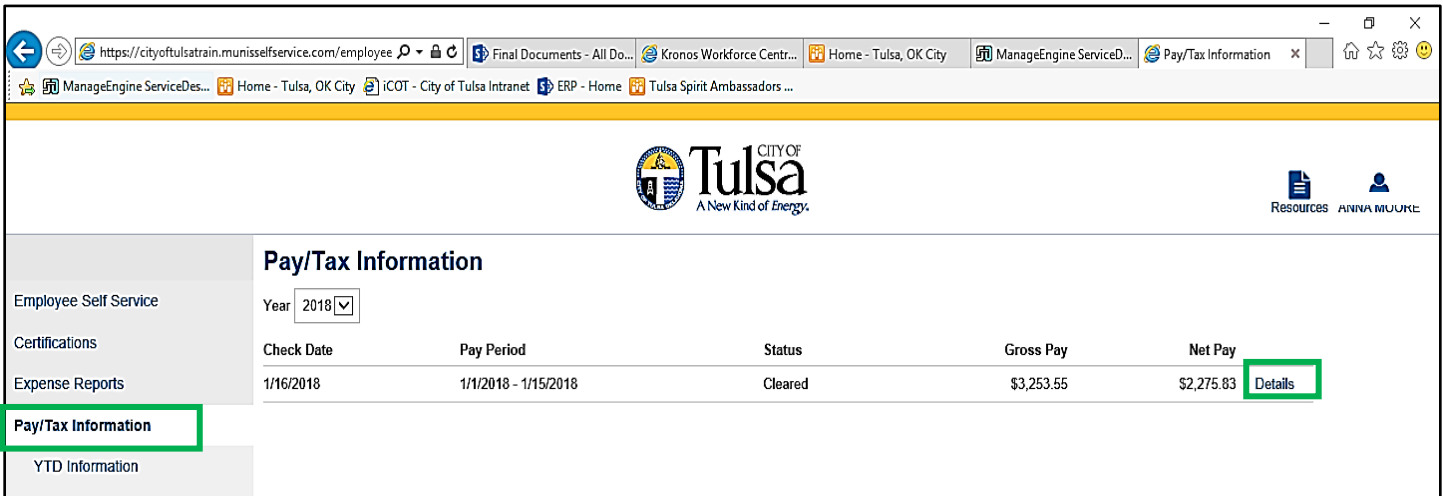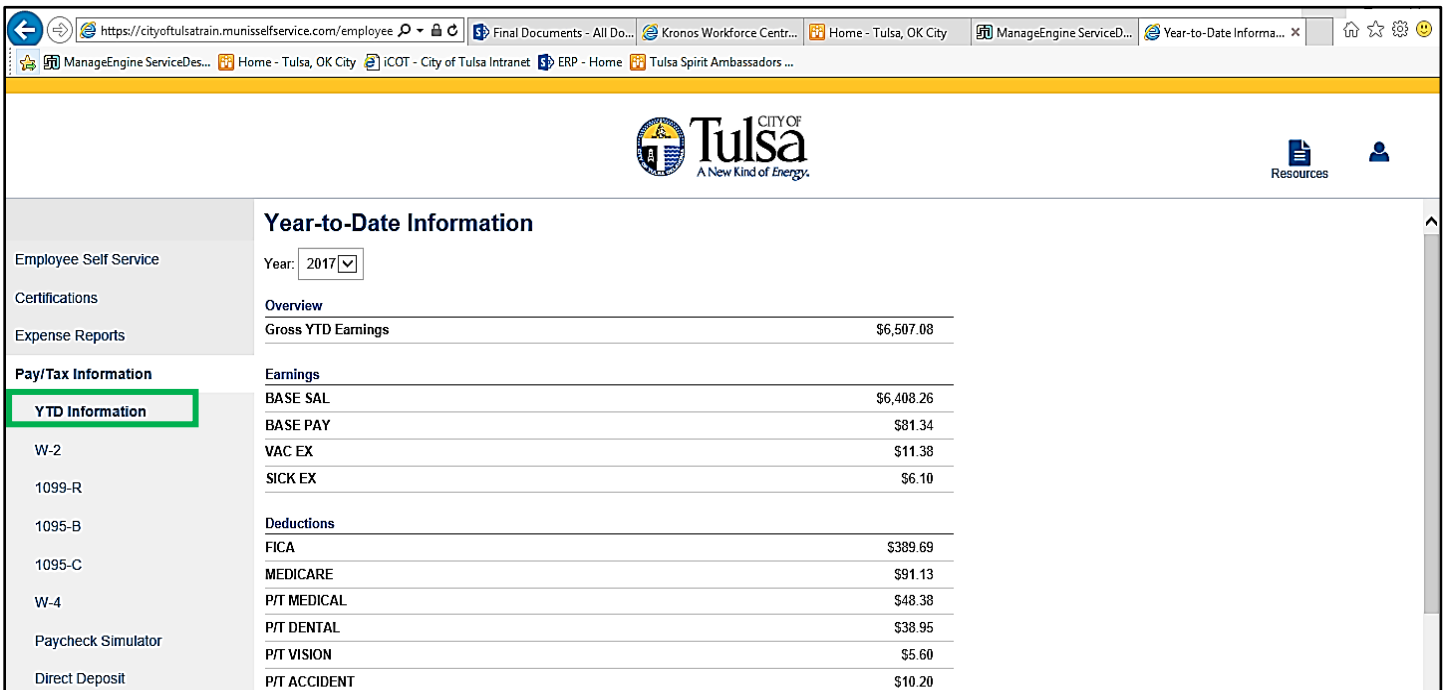When you click **Details**, the program displays the Check Detail page, which contains the pay advice information for the check. You cannot modify pay or tax information; it is for display only.

YTD Information

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

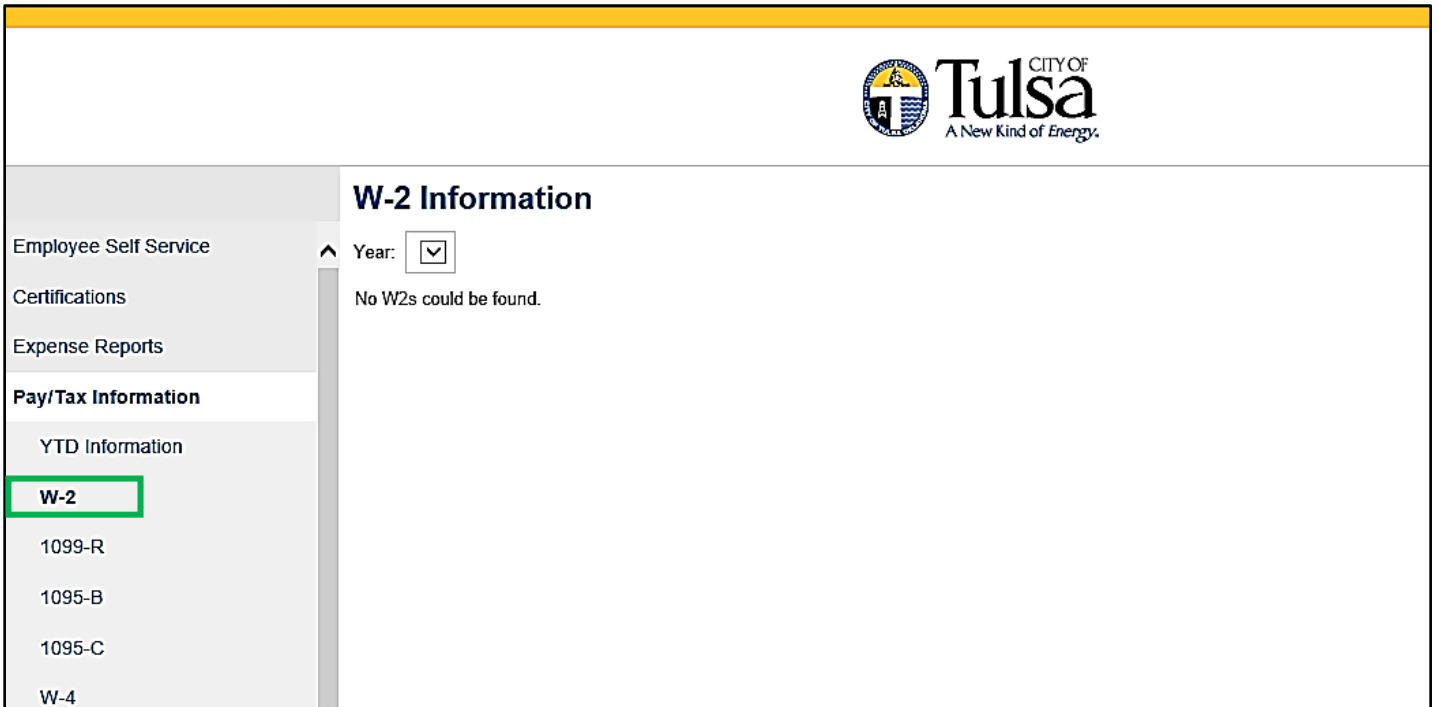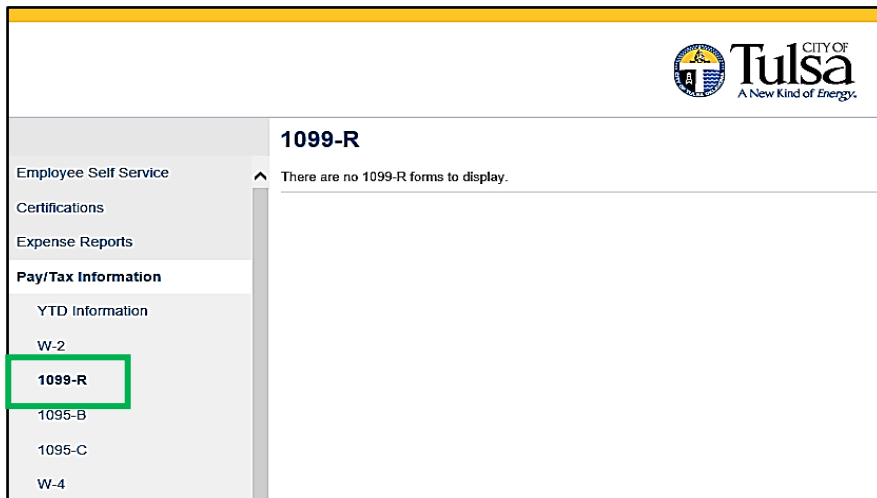## W-2 and 1099-R

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.

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.

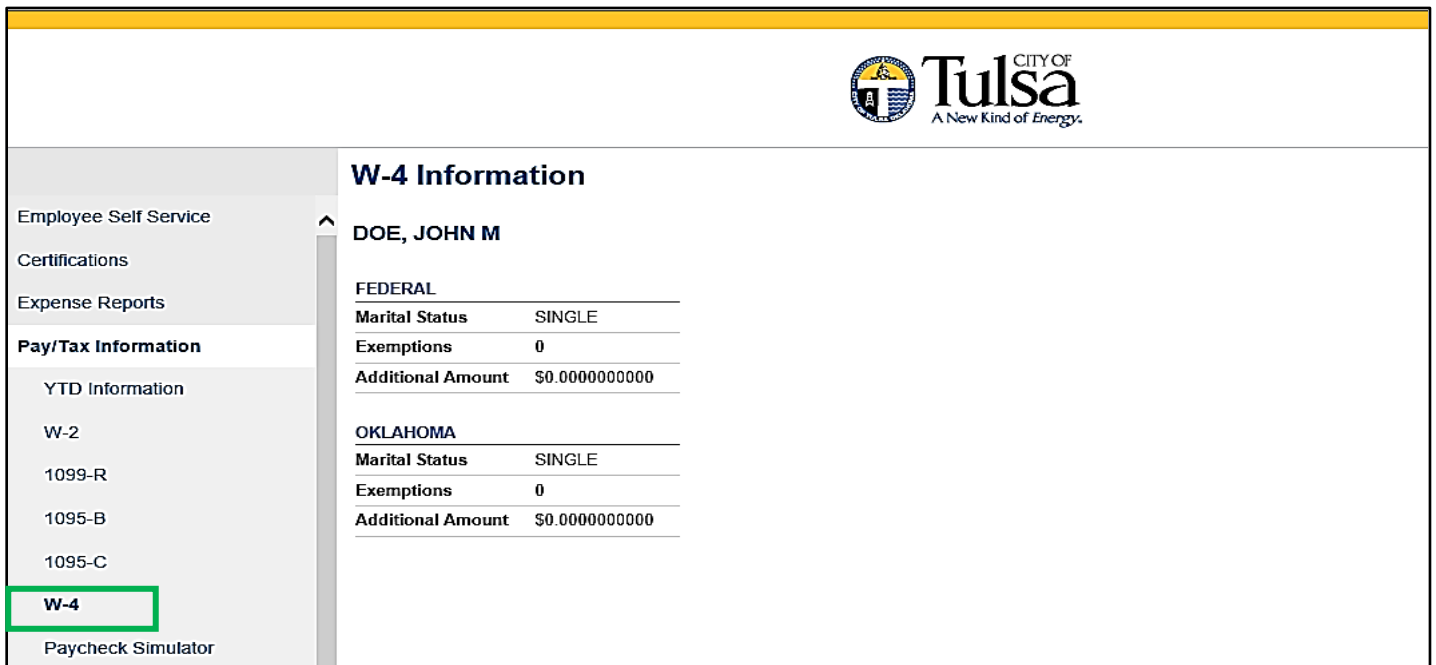**3.** Verify that the information is correct by selecting the acknowledgement check box and then click **Continue**. The program displays a review page.

4. 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 8 a.m. (CST) prior to payday 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 (dollar, or percent) allotted to each account using the ESS Direct Deposit page.

To modify your primary direct deposit information:

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

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**. You may also add dollar-based deductions. 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 they must take effect the Friday prior; otherwise the request will be processed the following pay period. If your bank name does not show up, please email: ERPSupport@cityoftulsa.org

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.
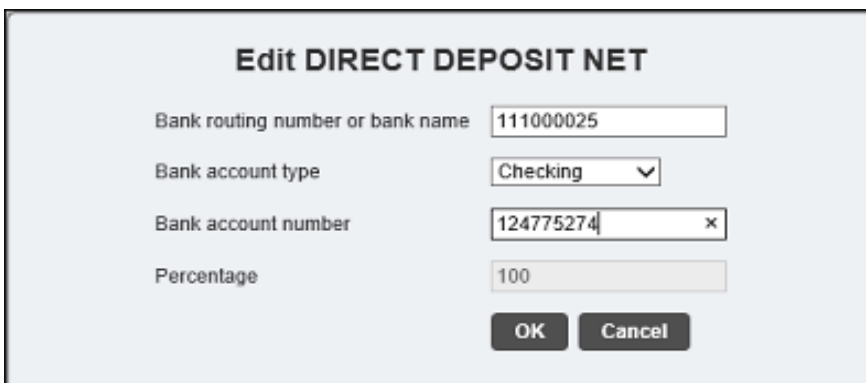
Primary account

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	**~~~~~~7579	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 on the next payroll cycle.

Direct Deposit Accounts

✔ Your new direct deposit information has been successfully submitted for approval. ⊗
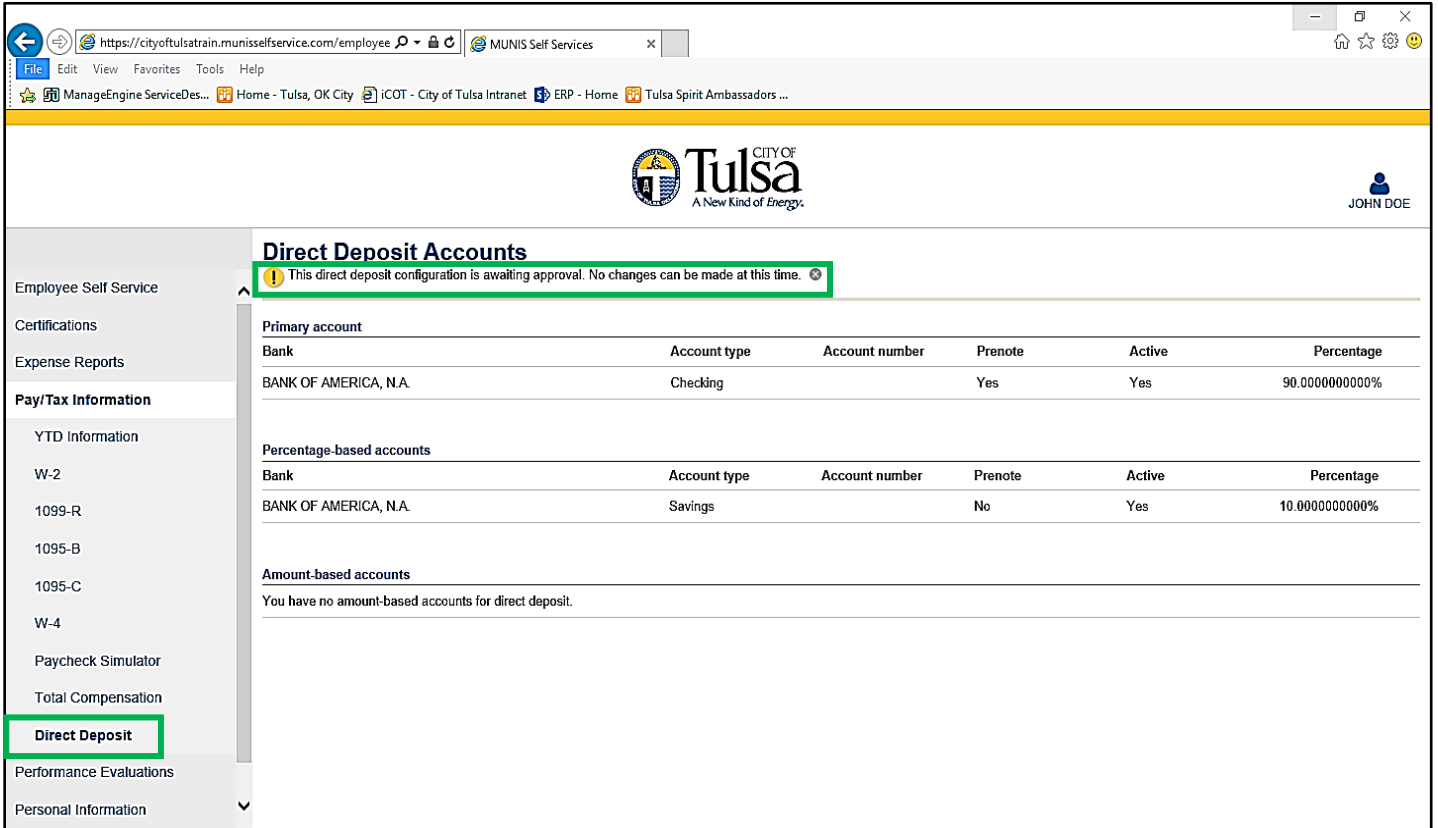
Primary account

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.
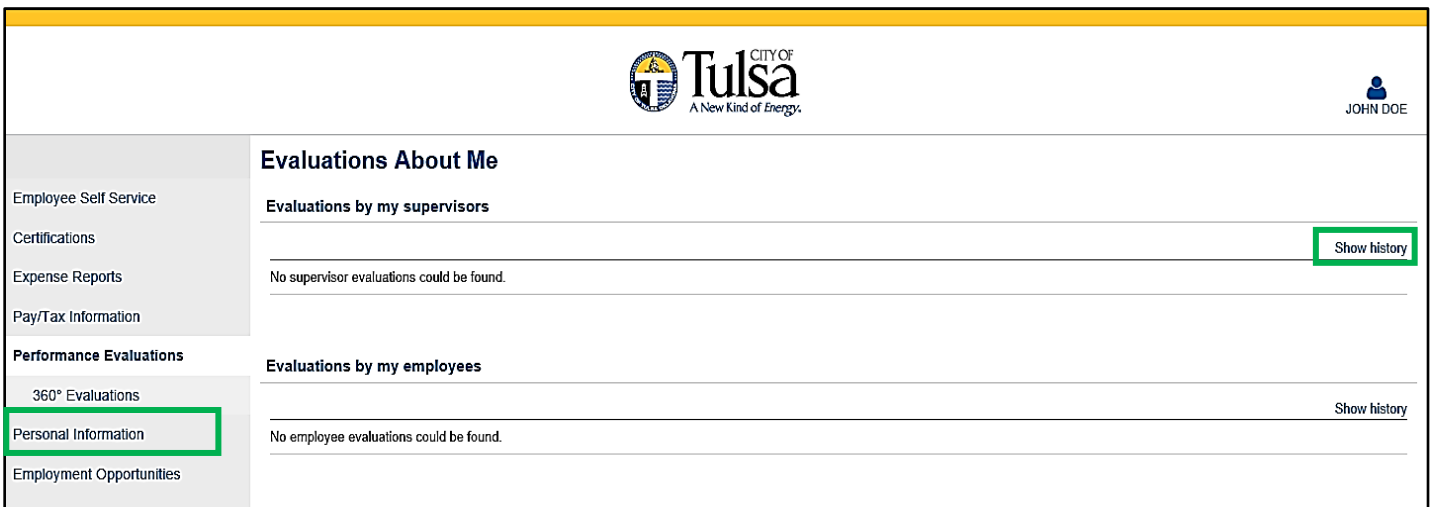
Performance Evaluations *Coming Soon*

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 will be coming soon on how to submit employee Performance Reviews. With the appropriate permissions, you can also create evaluations.

The Performance Evaluations option displays the Evaluations About Me page, which lists evaluations that you have received. The evaluations are grouped according to who performed them: your supervisors, your peers, your employees, and yourself.
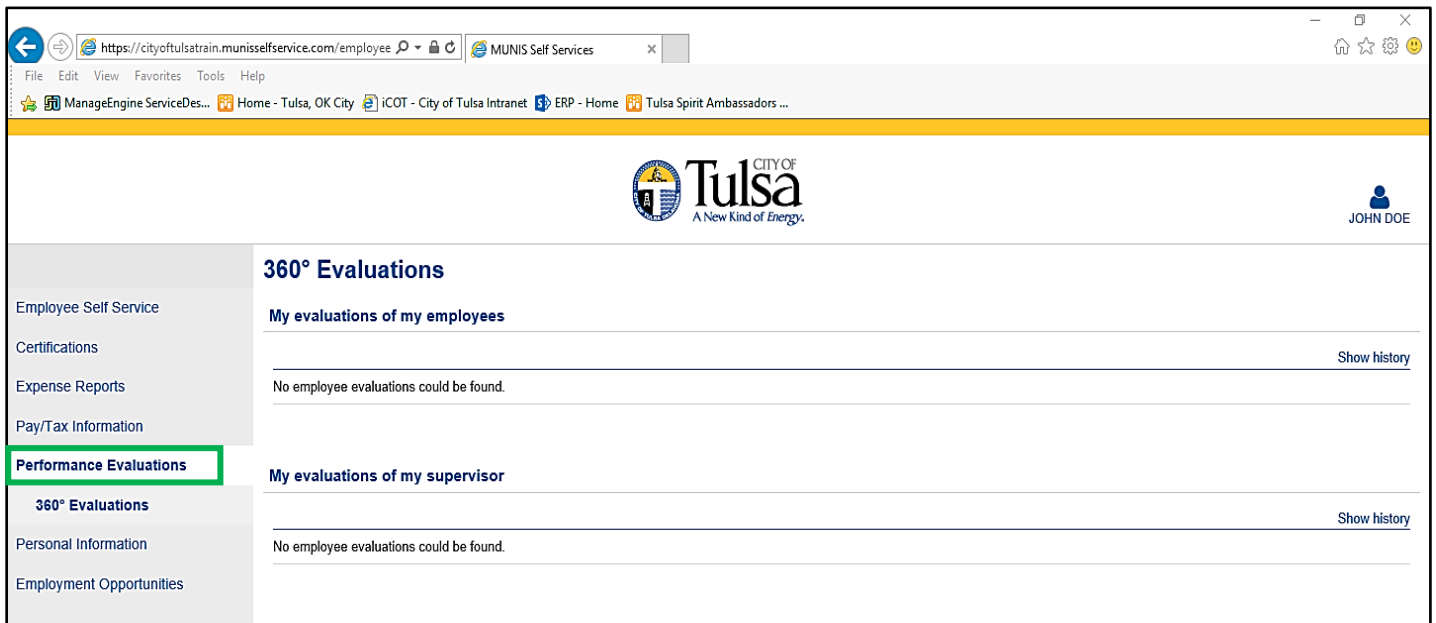
To view more evaluations of any type, click **Show History**.

Employee Evaluations *Coming Soon*

If you are a supervisor, you can use Employee Self Service to manage evaluations given to your employees. (*Additional user guides will be coming soon on how to submit employee's Performance Review's*)
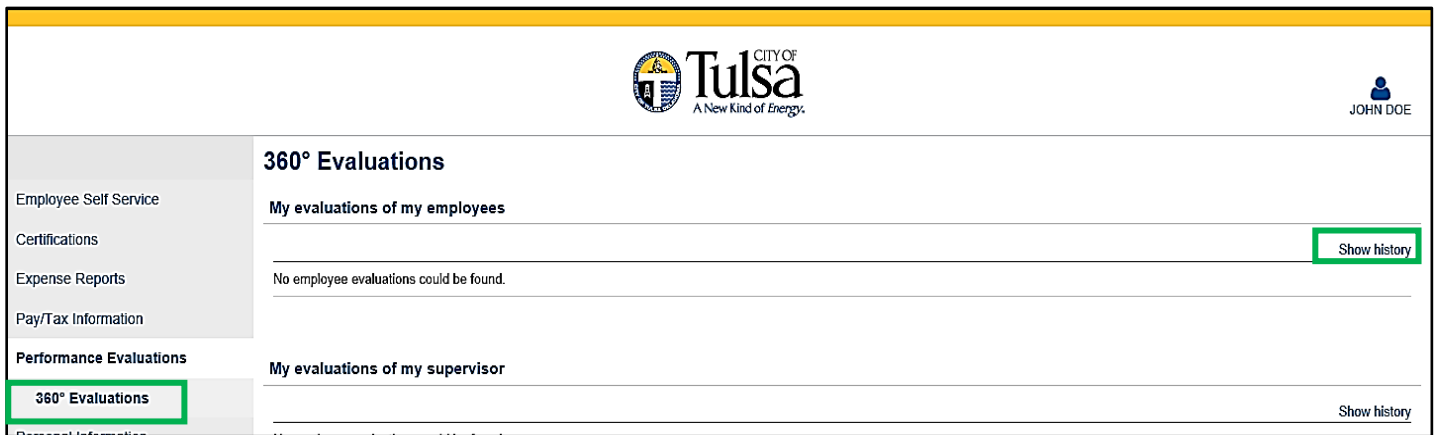
Click the Employee Evaluations option on the ESS menu to display the Employee Evaluations page. This page provides a list of evaluations given to your employees and grouped according to who performed them.

360° Evaluations *Coming Soon*

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

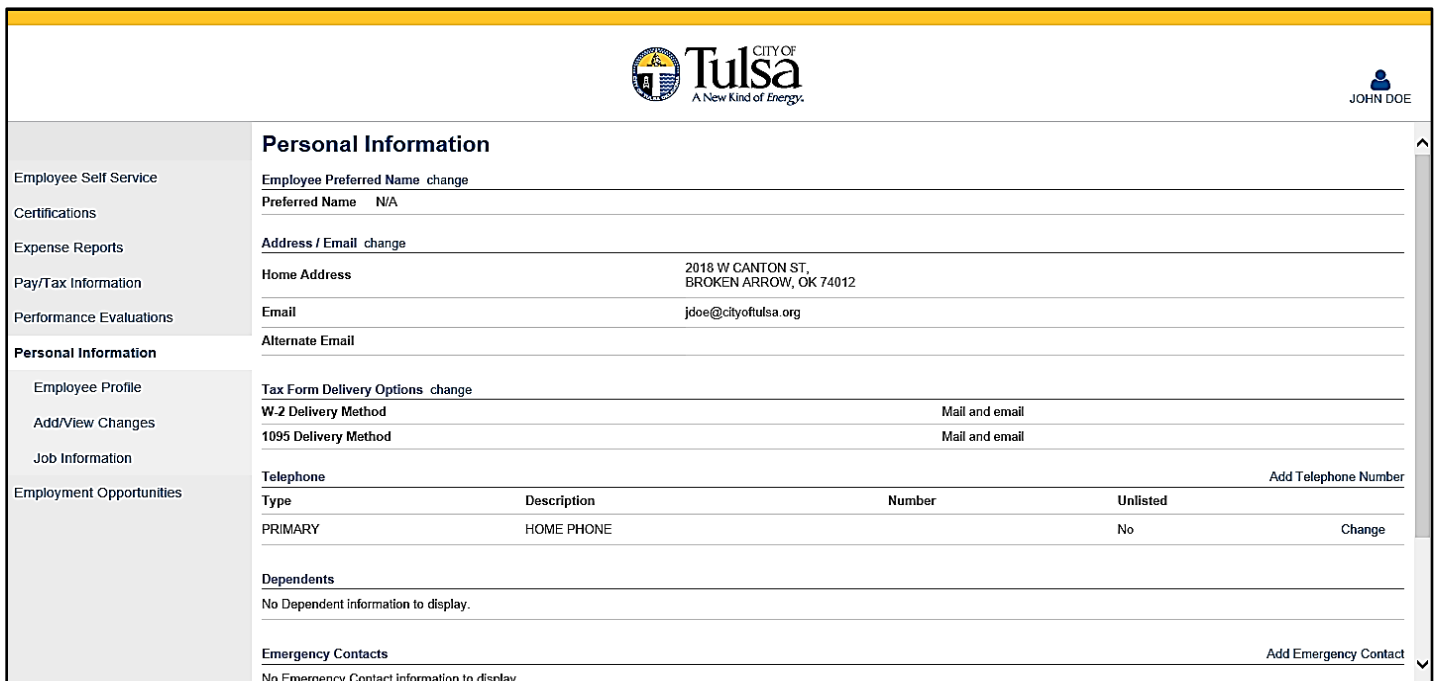If you have existing evaluations, use the Show History/Show Current link to toggle the view.

Personal Information

The Personal Information page displays your contact information, as well as dependent information and emergency contacts.

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.

You can add or update your personal information including Phone Number , 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.
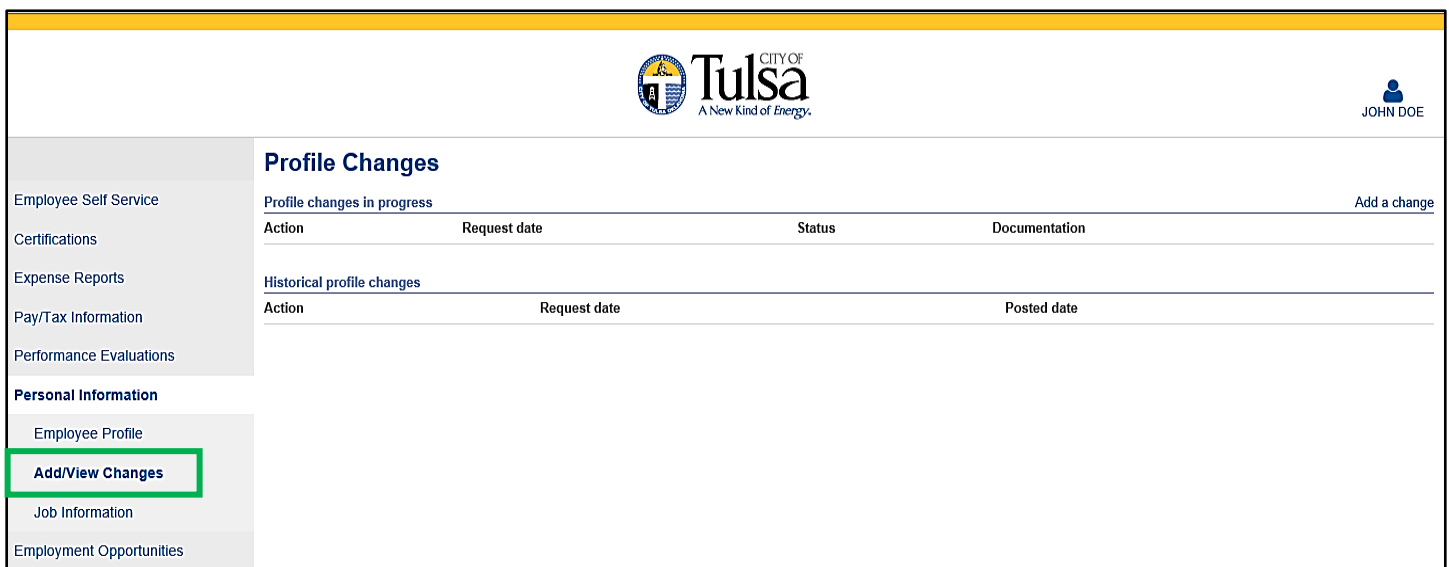

Add/View Changes

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.
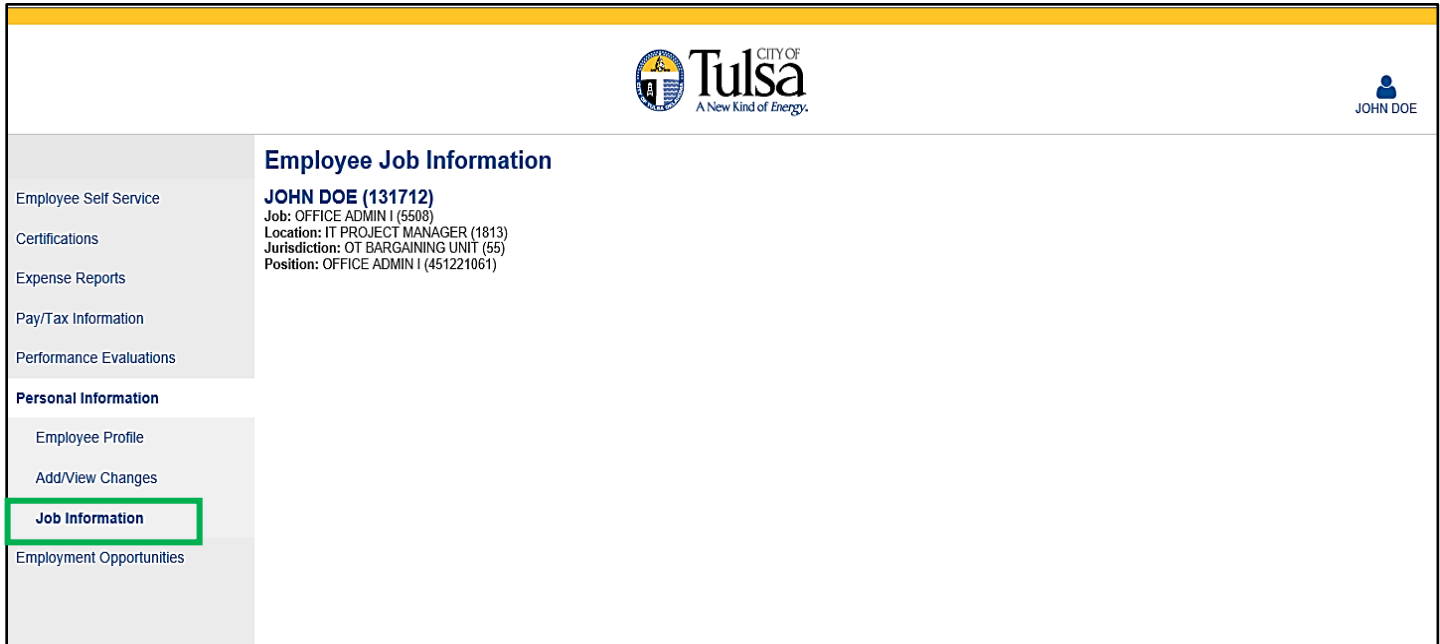
Job Information

You are able to view details regarding your current job.

Information displayed includes your Job Title, Job Class number, Location (who you report to or yourself if you are a supervisor), Jurisdiction (Group Bargaining Unit), and Position Title with Position Number. Years of Service details, which are drawn from the Munis Employee Years of Service program, are provided.

Employment Opportunities (Applicant Tracking)

Employment Opportunities can be accessed thru Munis Self Service: https://cityoftulsa.munisselfservice.com/employmentopportunities/default.aspx. Job applicants can view available jobs and apply for one or more jobs directly from the Employment Opportunities page.

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.