

The online version of this work instruction is official. Therefore, all printed versions of this document are unofficial copies.

#### WORK INSTRUCTION:

- 1. Upon receiving the VOE form, verify the signature or check the Social Security number of the applicant against the Social Security number of the employee in our files. If the name and Social Security numbers on file match, proceed to step 2. If the signature or Social Security number do not match, inform the company that you cannot release any information until we have matching records.
- 2. From your desktop, click on the MUNIS icon in ClassLink.
- 3. Enter your username in the first dialog box.
- 4. Enter your password in the second dialog box.
- 5. Once your username and password has been authenticated, the main application menu will be displayed.
- 6. Click on *Human Capital Management*. Choose "Payroll," "Employee Maintenance" and "Employee Master."

### An example of this screen is below:

| 🌾 Employee Master [CLARKSVILLE-MONTGOMERY CO. SCHOOL SYSTEM]                            |   |          |          |                               |             |         | n 4      | •       | 0        |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
|---|---|----------|----------|-------------------------------|-------------|---------|----------|---------|----------|-----------|------------|---------------|-------------|-----|-------|----|--------------------|-------------------|-----------|------------|-------------|-------------|-------------------|--------------------|-------------------|------------------------|--|--|---|
| <b>E</b><br>Back  | Q<br>Search   | Browse   | +<br>Add | Update                        | X<br>Delete | Output  | rent.    | Distay  | POF      | G<br>Save | 5<br>Email | 5<br>Schedule | Ø<br>Attach | ٠   | Ortai | C. | Mass<br>Deactivate | Reporting<br>Emps | Org Chart | Supervisor | Vew History | GL Act Find | Project<br>Update | Customer<br>Number | Applicant<br>Find | User Defined<br>Update |  |  |   |
| Employe   | e Identifica  | tion     |          |                               |             |         |          |         |          |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  | _ |
| Employe   | e * S   | SN *     | L        | ast Name                      |             |         |          | First N | lame *   |           |            | Mid           | dle Name    |     |       | м  | Suffi              | e                 | Status    |            |             |             |                   |                    |                   |                        |  |  |   |
| Preferred   | Name  |          |          |                               |             |         |          |         |          |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
| MAIN<br>Employe<br>Job Class<br>Summary<br>Location<br>Group/Bi<br>Pay Freq<br>Org/Obji | DATES<br>e Informati<br>*<br>r Job Class<br>*<br>U *<br>uency *<br>Proj * | DEMOG    | RAPHICS  | ADDRI                         | ESS PAY     | YROLL N | MAJL SOR | T LAS   | T CHANGE | e USER    | DEFINED    | BENEFI        | IT FTES     | ORG | CHART |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
| Work Site   |   |          |          |                               |             |         |          |         |          |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
| Personne<br>Check Lo  | d Status *<br>cation  |          | New Em   | Lui II<br>ployee<br>ce Screen | ing Pool    |         |          |         |          | ٠         |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
| State ID  |   |          |          |                               |             |         |          |         |          |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |
| D Test  |   | hecklist |          |                               |             |         |          |         |          |           |            |               |             |     |       |    |                    |                   |           |            |             |             |                   |                    |                   |                        |  |  |   |

- 7. The Employee Master screen will be displayed. Click on the magnifying glass at the top of the screen. Click on the Social Security Number dialog box and type the employee's Social Security number with dashes and click enter. If the Social Security Number was not included in the request but the signature is present, you may also search for the employee by name.
- 8. The employee's personal information will be displayed. The employee's job title will be displayed next to *job class*. Write the employee's job title on the VOE form.
- 9. Click on the dates tab to find the person's date of hire and enter that data on the VOE form.



- 10. In MUNIS, click on *Human Capital Management*. Choose "Payroll," "Employee Maintenance" and "Employee Job/Salary." The Employee Job/Salary screen will be displayed. Click on the magnifying glass at the top of the screen and enter the employee's MUNIS ID number, making sure that "Current" is checked in the "Search Period" field beneath the ID number search field. The employee's pay screens will be displayed. If the employee is Certified or Admin, follow the steps in step 11 for the annual pay. If the employee is Classified/Substitute, follow the steps in step 12 for the hourly pay.
- 11. If the employee is Certified/Admin, look at the bottom right hand corner of the screen under "Annual Pay," where the employee's current annual pay will be displayed. Note the amount listed in the annual pay. Looking at the "Pay Type" field, scroll through the employee's pay screens to look for any potential supplemental pay the employee may or may not receive. The supplemental pay will be listed in any pay screens after the "Extra Pay" (usually the last 1-3 screens listed). Take the annual pay and add any supplemental pay the employee may or may not receive to the total annual pay. Write the total amount of annual pay (including any supplemental pay) in the appropriate section of the VOE form and check the box on the form that says Annual. Check with Payroll if necessary to confirm the correct annual salary including base pay and any current supplemental income the employee makes.
- 12. If the employee is Classified/Substitute, look at the bottom right hand corner of the screen under "Hourly Rate," where the employee's current hourly rate of pay will be displayed. Write down the amount of employee's "Hourly Rate" from this section in the appropriate section of the VOE form and check the box on the form that says Hourly. Check with Payroll if necessary to confirm correct hourly rate of pay.
- 13. The number of times the employee is paid per year is in the top right hand corner of the screen under "Num Pays." Write the number of times the employee is paid in appropriate section of the VOE form. The number of hours the employee works per day is also in that section under "Hours/Day." If the employee is hourly (such as Classified/Substitute), multiply that number by 5 and write that number on the VOE form to show number of hours worked per week. If the employee is paid salary (such as Certified/Admin) write "N/A" in the appropriate section since salaried employees are not paid by the hour.
- 14. Return to the main Employee Master screen.
- 15. From the main MUNIS hub screen, click on *Human Capital Management*. Choose "Payroll," "Employee History," "Detail Check History Report." Click on the yellow *Define* button. Tab until you get to the first dialog box of the *Report Dates* section, where it allows you to enter a date. January 1<sup>st</sup> will always be the day you need to use. The year must be 2 years prior to today's year (i.e. If the day you are doing research is 10-31-08, you will need to enter 01-01-06). The next dialog box must have the date that you are doing this report (i.e. If the day you are doing research is 10-31-08).



An example of this screen is below:

| 🔆 Detail C  | heck History Report [CLARKSVILLE-MONTGOMERY CO. SCHOOL SYSTEM]   |
|---|--|
| € ✓<br>Back Accept  | Cancel   |
| Execute this report<br>Report Dates *<br>Report Order<br>Report Option<br>Year Option | Now         •           Specify         •           03/21/2022         to *           EMPLOYEE NAME         •           OETAIL         • |
| Single Employee<br>Employee Number<br>Location<br>Org                                 | <br>to ZZZZ  |
| Print Earnings Pay Type     Print Deductions  | 0 to 999   |

- 16. Tab until you get to *Report Option* and choose Year Total. Tab to Year Option and choose Calendar.
- 17. Check the box next to Single Employee.
- 18. In the employee number box, enter the employee's MUNIS ID number. If you do not have the employee's MUNIS ID number, click on the small gray box with 3 dots that is within that particular dialog box. Scroll down until you see the employee's name and double click on the employee's name.
- 19. Click on the green "Accept" button at the top of the screen. Click on the "Display" (magnifying glass with paper) icon in the top middle section of the screen.
- 20. The year total report will be displayed containing the employee's earnings for the last 3 calendar years. Enter that data in appropriate section of the VOE form accordingly.
- 21. Write "N/A" next to questions regarding overtime, commission or bonus pay.
- 22. Insert "good" for probability of continued employment.



- 23. Write "unknown" in sections regarding future pay increases (or employee ID numbers, depending on the VOE form).
- 24. Sign the VOE form with your information.
- 25. Fax or email the completed VOE form to the fax number or email address as indicated on the form. Once sent, scan the original form and attach the scanned file to the employee's Docuphase file using the "EMPLOYMENT VERIFICATIONS" doc type.

If the employee is a former employee, fill out only using information obtained from the employee's MUNIS file, such as dates of employment, which can be filled out by following step 9 of these instructions (the date tab also gives the reason for leaving next to the "Terminated" date). Depending on how long ago the person was employed, it may be necessary to look the employee in the "Terminated Employee Master" screen, which can be found in MUNIS in *Human Capital Management* and choosing "Human Resources," "Separations and Terminations" then "Terminated Employee Master."

### ASSOCIATED DOCUMENTS

6.1 Request for Verification of Employment (form varies by business/ institution).

#### **RECORD RETENTION TABLE**:

| Identification  | Storage | Retention  | <b>Disposition</b>   | Protection     |
|-----------------|---------|------------|--|----------------|
| VOE signed copy | File    | Indefinite | Scan into<br>Docuphase &<br>shred original<br>once in digital file | Secured Office |

#### **REVISION HISTORY:**

| Date:    | <u>Rev.</u> | Description of Revision:  |
|----------|-------------|---|
| 11/19/08 |             | Initial Release   |
| 2/18/14  | А           | Revision of wording and layout  |
| 6/26/15  | В           | Removed references to sections throughout   |
| 2/17/16  | С           | Removed references to "loan" and "lender".  |
| 6/13/18  | D           | #1: verify signature and check the SSN. Retention table: change "until VOE complete" to "indefinite". |
| 5/12/20  | Е           | Updated "Social Security" throughout and record table.  |
| 3/30/22  | F           | Updated throughout to reflect changes to terminology in MUNIS.  |
| 1/16/23  | G           | Added additional information in items 10, 11, 12.   |
| 11/13/23 | Н           | Made updates to reflect updates made to the MUNIS system.   |



\*\*\*End of Work Instruction\*\*\*