

# SESSION DESCRIPTIONS

General | MCSJ | Logics

## General Sessions

### **AI in Government**

This session will delve into the fascinating world of large language models (LLMs), with a focus on popular examples like ChatGPT. We will examine how these advanced systems are developed and trained, highlighting their key strengths and the areas where they still face challenges. Additionally, the session will provide practical guidance on how local governments can effectively leverage these powerful tools to enhance their daily operations, improve public service delivery, and foster innovation.

### **Don't Feed the Phish**

Phishing attacks are increasingly convincing, targeted, and frequent. This session examines the evolving techniques that cybercriminals employ to deceive users, including email, text, and voice scams. You'll learn how to recognize the warning signs and develop habits that will help keep you and your organization safe.

### **Getting the Most Out of Support**

This session will review the various ways to contact support, provide tips and tricks for submitting the best cases, and outline how to reach your Customer Success Manager. Additionally, we will explore the Community portal, where you can find knowledge articles, up-to-date product information, and engage in forum discussions with your peers.

## MCSJ Sessions

### **Advanced Property Tax Enforcement**

This session explores key strategies for effective collections, including delinquent notices, penalties, legal measures, and the use of payment plans. We will review the importance of securing municipal revenue to ensure fairness for compliant taxpayers. Additionally, participants will gain insight into accurate reporting practices and the implications of property liens.

# MCSJ Sessions Continued

## **AP Tools: ACH, Requisitions, and More**

This session will provide a comprehensive overview of AP Tools, with a focus on setting up and processing ACH payments to vendors in Accounts Payable. We'll walk through key setup areas, including Parameter Setups and Vendor Setups, and demonstrate a step-by-step example of processing an ACH check batch within MCSJ's Finance Super Suite. In addition, we'll share helpful tips to streamline finance operations, such as disabling requisitions, skipping requisition approvals, and more practical time-saving features.

## **Bank Reconciliation**

This session for MCSJ Finance users covers the entire bank reconciliation process, including setting up Bank IDs and Bank Reconciliation IDs, reconciling transactions, and using key system tools such as display views, sorting and subtotalling transactions, and bank reconciliation reporting. This session is ideal for finance staff looking to streamline their workflow and gain a deeper understanding of the tools available in MCSJ to improve cash reconciliation accuracy.

## **Benefits of Tracking & Class IDs**

In this session, you'll learn how to create and assign Class IDs and Tracking IDs in MCSJ. We'll explore how Tracking IDs allow for flexible cross-module transaction reporting. You'll also see how Class IDs support grouped financial reporting, including the Income Statement and Balance Sheet, and how they can be applied to MCSJ's new Cash Flow Forecasting feature. By the end of the session, you'll understand how to use these tools to strengthen your reporting and financial analysis.

## **Budget Preparation**

This session will provide a comprehensive overview of the budget preparation process in MCSJ from start to finish. Participants will learn how to export and import data using Excel, allowing for efficient budget management without redundant data entry. Additionally, we will review inputting notes, project personnel cost increases, and printing customized worksheets.

## **Financial Reporting**

This session covers key MCSJ financial reporting tools, including General Ledger reports (Trial Balance, Balance Sheet, and Income Statement), and provides guidance on conducting effective transaction inquiries. It also covers Revenue and Expenditure reporting, including Account Status Reports, Cash Receipts Reports, the Statement of Revenues and Expenditures, and options for custom reporting. This course is ideal for finance staff seeking to enhance their reporting skills and confidently utilize MCSJ's reporting features.

## **Online Payments & DataPointe Reporting**

This session will provide an in-depth look at the most recent enhancements to our Online Payment System and offer a deeper understanding of its reporting capabilities. You will explore various options currently available to you and your customer base, designed to streamline the payment process and ultimately boost collection rates.

# MCSJ Sessions Continued

## **Parks & Recreation**

This session will examine both the backend admin interface and the front-end user experience of our Parks and Recreation portal. Participants will learn about various membership types, reservation and check-in options, transaction and concession management, the ability to create customized ID cards, and more.

## **Payment Reversals (Tax/Utility/AR)**

This session will cover managing payments in the payment window, creating batches, and processing payments for tax and utility charges. We will discuss reconciliation and tracking of payments against tax and utility liabilities. Additionally, we will provide insights into utilizing features such as the shopping cart for multiple property payments and the importance of the payment cash receipt report.

## **Payroll FAQs**

This session will address common payroll questions and offer practical guidance for everyday processing. We'll discuss the new automated overtime calculation in software version 2025.1 and above, along with the differences between the Attendance Import and Create Standard Time Entries routines. Additionally, you'll learn how to adjust attendance post-import. Finally, we'll share helpful payroll tips and best practices to improve your workflow.

## **Payroll Reconciliation**

This session will focus on payroll reconciliations, specifically addressing common errors and warnings encountered during payroll processing. Participants will learn about the importance of calculated payroll reports and budget distribution verification listings, which help prevent systematic errors. Additionally, we will cover how to adjust employer liability codes and ensure accurate payroll updates.

## **Permitting & Code Enforcement Best Practices**

This session will review our Permitting and Code Enforcement suite, including core MCSJ functionality, the Inspector's Application, and the Online Permit Application. We will demonstrate how to manage notifications and activities within the system, enabling tailored communication and documentation. Participants will discover how this suite can make everyday processing easier and more efficient.

## **Preparing for Year End - Payroll**

This session will focus on recommendations of what to do as we near the end of year for payroll and routines to save time. We will review how to handle things such as outstanding payroll checks, preparing for employee raises/increases, globally updating employee information, and potential changes in deduction/benefit amounts.

# MCSJ Sessions Continued

## **Receivables to Revenue Modules**

This session will focus on the integration of MCSJ's Miscellaneous Accounts Receivable, Utility Billing, and Property Tax modules with the Finance Super Suite. We will examine A/R service IDs and payment codes, as well as Utility Billing and Tax bill codes, balance adjustment codes, and payment codes. Additionally, we will review when specific types of activities are posted to the financials and how the finance entries are being made.

## **Tax & Utility Custom Reporting**

This session will provide an overview of tax and utility custom reporting, highlighting best practices and general setup. We will discuss the importance of these reports for state provider or board meetings, including how to export data for improved formatting. Participants will also learn how to utilize these reports for tracking active meters, property tax updates, and ensuring accuracy in assessments.

## **Utility Calculations & Reporting**

This session will cover the various MCSJ utility calculations, including best practices for managing meter readings, bill calculation, and penalty calculation. It will also explore key tools, such as variance and billing reports, to uncover issues like faulty meters and billing errors, along with tips for accurate meter corrections and effective data management.

## **ViewPoint Finance & Utility/Work Order Dashboard**

The session will showcase both the Finance and Utility/Work Order dashboards, which consolidate data and allow for extensive customization. We will focus on the availability of multiple templates for different user profiles, configuration options/samples, as well as the new print tool that you can utilize for longer reporting.

## **Virginia Personal Property Tax**

This session will cover Virginia Personal Property Tax, including how to add personal property records, calculate supplement bills, and initiate vehicle abatements. We will also review both manual and automated adjustments, such as writing off uncollectible balances, as well as generating a variety of related reports.

# Logics Sessions

## **Eagle Utility New Features & Functions with IVR Updates**

This session will introduce new features for our Utility module, IVR, and mass meter change-outs. We will cover how to improve account management through asset location maintenance and service line material tracking. Additionally, participants will learn how IVR automated payment processing capabilities ensure compliance and support multiple payment options.

# Logics Sessions Continued

## **Eagle Utility Reports, Month End, Etc.**

This session will cover updates to utility billing reports and custom functionalities. We will review new usage reports, which enable users to run reports across different cycles and services, with options to export data. Participants will learn how modifications to existing reports, such as the deposit register and voucher listing reports, can improve tracking and data visualization. Additionally, we will discuss best practices for month end reports and balancing.

## **Eagle Utility Tips & Tricks**

During this session, we will share helpful tips and tricks for the Eagle Utility system that many users often overlook. We'll cover billing date improvements, how the Rate Inquiry tool can assist during rate changes, navigating default settings, and tools to assist with reading exceptions, as well as options for deposits.

## **Online Bill Pay & Security Features**

This session will review the latest updates to our Online Bill Pay system, including new tools, expanded payment options for miscellaneous invoices, and security improvements. We will cover the Link Bill tool, which enables users to search using various filters such as email and account number. Additionally, we will discuss new security features like PINs, multifactor authentication, and password settings to protect online transactions.

## **Phoenix Finance New Features**

The session highlights recent updates to the Logics Finance system. We will discuss managing fiscal year closures independently, with new options for locking and unlocking years. Participants will learn about electronic payment options, improved check handling, and the ability to easily create backup files. Additionally, the session will review enhancements to purchase order and requisition procedures, along with changes made to support IRS requirements.

## **Phoenix Finance Tips & Tricks**

During this session, we will share Phoenix Finance tips and tricks to boost efficiency and effectiveness in managing financial data. Participants will learn how to import journal entries, invoices, and credit card transactions in various formats, as well as how to export budgets and reports. Additionally, we will review how to set up recurring templates and functions to save time and streamline data entry.