Miami-Dade County



End User Training Resource Guide

Course Code: DPR 302 Course: Departmental HR - Personnel Changes

Updated 12-26-2024

Guide Overview

Guide Description This guide provides a comprehensive review of the business processes for Departmental HR Personnel Changes. Topics include Submitting Position Changes, Payroll, and Workflow Approvals. Additionally, the guide explains Submitting HR Transactions as well as Reports and Queries.

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This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Personnel Changes
- Module 3: Course Summary



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Module 1: Course Introduction

Topics This module covers the following topics:

- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits
- The End-to-End Business Process

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Module 1: Introduction

Learning

At the conclusion of this course, participants will be able to:

- Objectives
- Submit Job Change • Position Management
- Define Department/Position Budget Data •
- Submitting Position Change •
- Submit Job Data Changes that Impact Benefits •
- Submitting HR Transactions •
- Submitting HR Salary Changes •
- Workflow Approvals
- Reports and Queries

	Module 1: Introduction
Audience:	The following roles are associated with this course and will play a part in conducting the
Roles and Responsibilities	 Department Personnel Representative (DPR): The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service (ESS) and Manager Self-Service (MSS) transactions.



Purpose andThe purpose and benefits of the Departmental Human Resources Personnel ChangesBenefitsbusiness processes include:

- Reduce paper processes
- Employee empowerment via Employee Self-Service, Manager Self-Service, and Mobile Capabilities
- Faster processing time
- Recruit to Hire to Paycheck in one system
- Enhanced Reporting
- Job Opening Defaults from Position
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System LOA, retirees, and benefit billing all in one system
- Recruitments are managed through position wherever possible
- Miami-Dade County and Constitutional Offices use position management

Key Factors:

- Positions need to be approved before changes take effect on employee's data
- Positions need to be approved before they can be attached to job opening



Navigation Below are the steps to navigate to DPR Self-Service which will be used for navigation in the rest of this guide:

Navigate to Human Resources (HCM) > DPR Self-Service1. Login to INFORMS and select Human Resources (HCM) from the home landing page below.



2. Select DPR Self-Service.

Human Resources (HCM)						
Recruiting	DPR Self-Service	Forms and Approval - HR Forms				
HR Administration	Time and Absence	Company Directory				
Performance Administration						



Navigation

The three main Navigations for this guide under DPR Self-Service are **DPR Salary Change, Manage Position, and Employee Position Lateral XFER**.



Navigation for Job Data: Human Resources (HCM) > HR Administration

Human Resources (HCM)						
Recruiting	DPR Self-Service	Forms and Approval - HR Forms				
HR Administration	Time and Absence	Company Directory				
Performance Administration						

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The End-to-End Ì Human Capital Management **Business Process** BUSINESS INTELLIGENCE SCORECARD Manager Self Service Capabilities Employee Self Service Capabilities • Approval of Timesheet and Absence Request • Update Demographic Data • Benefits Errollment • Performance management • Update Var Xo Data • Absence Request • Termination • View Paycheck • Profile Management Accounts Payable and General Ledger Absence Management Benefits Administration I 1 Project Costina Recruiting-BUDGETING Time and Labor Payroll ePerformance Position Management Enterprise Learning Management L Human Resources Personal Data • Job Data • Compensation • Discipline • Profile Managem Department Applications VASD/MDAD Financials External Partners NFORMS Financia Documentum

Module 1: Introduction



Module 1:The following key concepts were covered in this module:Introduction• Learning ObjectivesSummary• Roles and Responsibilities

- Navigation
- Purpose and Benefits
- The End-to-End Business Process



	Module 2: Personnel Changes
Module 2:	This module includes the following lessons:
Introduction	Submit Job Change
Summary	Position Management
	Define Department/Position Budget Data
	Submitting position change
	Submit Job Data Changes that impact benefits
	Submitting HR Transactions
	Submitting HR Salary Changes
	Workflow Approvals

• Reports and Queries



	Lesson 1: Position Management
Lesson 1:	At the conclusion of this lesson, you will be able to:
Overview	Acquire knowledge of the Position Management Business Process
	Learn how to create new position requests
	Learn the Budget Approval Process

• Validate the New Position Request

Lesson 1:

Introduction







Lesson 1: Introduction

The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self-Service transactions. The Position Management Processes are as follows:

- Departments can submit requests for new or changing Position Data.
 - For a new position, Position Data is updated after Budget approval.
- Position Data now requires:
 - Lower-level Department IDs
 - FTE/Standard Hours (bi-weekly hours worked) bi-weekly rate determined by FTE and Classifies total bi-weekly standard hours for each position
 - Regular/Temporary Indicator controls Florida Retirement System (FRS) and Benefits Eligibility
 - o Job Code defaults the Union Code as well as Salary Plan and Grade information
- The DPR is responsible for adding the default budget funding for new positions and updating position budget funding
- The Constitutional Office Department Budget Approver reviews and approves job openings and new position requests for their respective Constitutional Office.



Lesson 1: Position Management Capabilities

Listed below are fields that flow from Position Data to Job Data:

- Job Code
- Regular/Temporary Indicator
- Full/Part-Time Indicator
- Union Code
- Salary Plan and Grade (Step is entered in Job Data during Manage Hire)
- Standard Hours
- FLSA Status (Job Basis/Non-Job Basis)



Key Terms



The following key terms are used in this module:

Term	Definition
Full-Time Equivalent (FTE)	A unit that indicates the workload of an employed person. FTEs are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.
Job Code	Contains the classification's title, salary plan and grade, bargaining unit, and job description.
Position Data	Details related to a position including Position Information, Job Information, Work Location, and Salary Plan Information.
Company	A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets.



Lecture 1: Create New Position Create a New Position as the Department Personnel Representative (DPR).

Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position



1. Select the **+ Add** button on the **View Manage/Create Position** page.

C DPR Self-Service		Manage/Create Position
▼New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search		

NOTE: On **Create Position** page, users can leave the Position Number field as is as INFORMS will automatically generate one.

- 2. In the ***Effective Date** field, enter a date that correlates with the beginning of the fiscal year.
- 3. Select Continue.

Create Position	Continue
Position Number 00000000	
*Effective Date 12/27/2021	
Effective Sequence 0	
Reason NEW New Position	

Lecture 1:The Create New Position process consists of five (5) steps which are Position Data,
Additional Information, Attachments, Budget Incumbents, and Review and Submit.
Once all the steps are complete, the OMB Budget Administrator reviews and approves
the request in INFORMS. Once the request is fully approved the new position is
successfully established within INFORMS.
The Position Data page (Step 1 of 5) is where users enter and review the Position

The **Position Data** page (Step 1 of 5) is where users enter and review the **Position** Information, Job Information, Work Location, and Salary Plan Information.

In the Position Information section, users select the following:

1. In the *Filed Status field, select Approved.

NOTE: Proposed is selected when requesting a position for the next Fiscal Year.

- 2. In the **Max Head Count** field, enter the number of seats you are requesting with the same classification in that position.
- 3. In the ***Status** field select **Active** as users are requesting to activate a new position.
- 4. In the Budgeted Position ensure Yes is selected for budgeted positions.

NOTE: If the position is an Overage select No.

5. In the **Non-Mayoral** field, ensure **No** is selected for positions under the Mayor's purview.

NOTE: Departments NOT under the Mayor's Purview will select Yes.

6. The Senior Management field (Leave as default).

Step 1 of	5: Position Data						
	Effective Date	12/27/2021 Reason Code NEW New Position					
	Effective Sequence	D Approval Status Not Available					
Position Info	Position Information						
	*Filed Status	Approved v Max Head Count 2					
	*Status	Active 🗸					
	Budgeted Position	Yes Non-Mayoral No					
	Senior Management	No					

Lesson 1: Position Management				
Lecture 1:	In the Job Information section, users select the following:			
Create New	7. The *Business Unit field is default by security.			
Position	 In the Full/Part Time field, select Full-Time or Part-Time depending on the position. 			
	 In the *Job Code field, select the magnifying glass to search for the respective classification or enter the six-digit Job Code (00XXXX). 			
	NOTE: Once the Job Code is entered, INFORMS automatically uploads the following fields pertaining to the classification selected. Users must leave the following as defaulted:			
	Union Code (Defaults from Job Code)			
	Short Title (Defaults from Job Code)			
	*Regular Shift (Defaults from Job Code)			
	Description (Defaults from Job Code)			
	• *Title (Defaults from Job Code)			
	 *Regular/Temporary (Defaults as Regular from Job Code) 			

NOTE: The ***Regular/Temporary field** defaults to **Regular** for Full-Time positions from the Job Code but users can select **Temporary** for positions that will not receive benefits.

Job Info	rmation			_				
	*Business Unit	PR C	Parks, Recreation & Open Spcs		*Full/Part Time	Full-Time	*	
	*Job Code	000459	Hris Technician		Union Code	Н	۹	Local199 - General Employees
*Re	egular/Temporary	Regular	•	•	Short Title	Hris Tech		
	*Regular Shift	Not Applicable	/		Description	Hris Technician		
	*Title	Hris Technician						le l



Lecture 1: Create New Position

- In the **Work Location** section, users will review or select the following:
- 10. Ensure ***Reg Region** is set to **USA**.
 - 11. In the ***Department** field, select or enter the **Department ChartField** where the position will be located.
 - 12. In the **Location** field, enter the **Location ChartField** where the position will be located.
 - 13. In the **Reports To** field, select the **reporting position number**.

NOTE: The **Reports To** field must have the position number of the direct report (immediate supervisor) of the new position.

14. In the **Supervisor Level** field, select the appropriate **Supervisor Level** for the classification.

Supervisor	Description
Level	
01	Mayor/Commissioners
02	Deputy Mayors/Special Advisors
03	Assistant to Mayor
04	Department Directors
05	Deputy Directors
06	Assistant Directors
07	Division Directors
08	Assistant to Directors
09	Assistant Division Directors
10	Sr. Bureau Commander/Bureau Commander/Section Head
12	Supervisor Classes
13	Non-Supervisory
14	Nonsupervisory Professionals
15	Protective Services

Listed below is the **Supervisor Level Chart** with their respective description.

15. In the ***Company** field, ensure that the appropriate value has been entered.

Work Locat	tion						
	*Reg Region	USA Q	United States	*Company	MDC	۵	Miami Dade County
	*Department	PR08000000 Q	HUMAN RESOURCES				
	Location	PR0000001 Q	1451 NW 67TH ST				
	Reports To	00010781 Q	HUMAN RESOURCES MANAGER				
View Cu	rrent Incumbent	s					
Sup	pervisor Level]				

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Lesson 1: Position Management

Lecture 1:16. In the Salary Plan Information section, the following fields automatically default
from the Job Code:PositionSalary Admin Plan (Leave as Defaulted)Create (Leave as Defaulted)

- Grade (Leave as Defaulted)
- Work Period (Leave as Defaulted)
- Step (Leave blank, step is only entered on employee job record)
- 17. In the Standard Hours field, enter 80 for a Full-Time position.

NOTE: If the position is Part-Time, list the amount for the scheduled hours to work.

Salary Admin Plan	н	Q		Grade	147	Q
Standard Hours	80.00			Step		Q
Work Period	в	Q	Biweekly			

18. In the USA section, the FLSA Status field automatically defaults from the Job Code:

• FLSA Status – Non Job Basis/Job Basis (Leave Defaulted)

▼ USA			
[FLSA Status	Non Job Basis	•

19. After confirming that the information submitted is correct, select Next.

x Exit					Create Position			
Position Number 00000000 Headoount Status Open Current Head Count 0							Next >	
1 Position Data Visited	Step 1 of 5: Pos	sition Data						
2 Additional Information Not Started		Effective Date	12/27/2021			Reason Code Approval Status	NEW New Position Not Available	
3 Attachments Not Startad	Position Information	*Filed Status	Approved V			Max Head Count	1	
4 Budget Incumbents Not Started		*Status	Active		•			
6 Review and Submit Not Started		Budgeted Position Benior Management	NO			NOR-MAYORAI	196	
	Job Information							_
		*Business Unit	PR Q	Parks, Recreation & Open Spcs		*Full/Part Time	Ful-Time ¥	1
		*Job Code	000459 Q	Hris Technician		Union Code	H Q, Local199 - General Employee	15
		*Regular/Temporary	Regular 🗸			8hort Title	Hris Tech	1
		*Regular Shift	Not Applicable			Description	Hris Technician	1
		"Title	Hris Technician				l	
	Work Location							_
		*Reg Region	USA Q	United States		*Company	MDC Q, Miami Dade County	
		*Department	PR08000000 Q	HUMAN RESOURCES				
		Losstion	PR00000001 Q	1451 NW 67TH ST				
		Reports To	00010781 Q	HUMAN RESOURCES MANAGER				
	View Current Incur	pents						
		Supervisor Level						
	Salary Plan Informat	lon						
		Salary Admin Plan	H Q			Grade	147 Q,	
		Standard Hours	80.00			Step	٩	
		Work Period	B Q	Biweekly				
	Specific information	n						
	> USA							
		Updated on				Updated By		



Lecture 1:In the Additional Information page (Step 2 of 5), the following fields automatically
default:Position*Pre-Encumbrance Indicator (Leave as Defaulted)

- *Pre-Encumbrance Indicator (Leave as Defaulted)
- *Encumber Salary Option (Leave as Defaulted)
- *Classified Indicator (Leave as Defaulted)

Toggle **Adds to FTE Account** if position is budgeted. In the **Full-Time Equivalent (FTE)** field, users must enter the proper FTE for the new position.

- For a **Full-Time position the FTE is 1** regardless of the number of employees seated within the position.
- For a Part-Time position users must properly calculate this by taking the Scheduled hours and dividing it by 80 hours.
 - **Example:** 59 Scheduled Hours/80 hours = 0.7375 hours. The FTE for this Parttime position would be .7375 which users will enter in the FTE field.

NOTE: This is the factor that will prorate the employee's salary.

- 1. In the FTE field, enter the 1 for Full-Time.
- 2. Select Next to go to Attachments Step 3 of 5.

× Exit			Creat	e Position		
Position Number 00000000 Headcount Status Open Current Head Count 0						< Previous Next
1 Position Data Visited	Step 2 of 5: Additional Inform	nation				
-	Effective Date 1	2/27/2021			Reason Code NEW New Position	
2 Additional Information	Effective Sequence 0				Approval Status Not Available	
Visited	Education and Government					
3 Attachments Visited						
	"Pre-Encumbrance Indicator	Encumber Immediately	~		FTE 1.000000	
4 Budget Incumbents Visited	"Encumber Salary Option	Salary Step	~		Adds to FTE Actual Count No	
6 Review and Submit Not Started	*Classified Indicator	Classified	~			



Lecture 1: In the Attachments page (Step 3 of 5), users add supporting documentation for the **Create New** new position. Position

1. Select Add Attachment.

× Exit		Create Position	:
Position Number 00000000 Headcount Status Open Current Head Count 0			
			< Previous Next >
1 Position Data	Step 3 of 5: Attachments		
	Effective Date 12/27/2021	Reason Code NEW New Position	
2 Additional Information Visited	Effective Sequence 0	Approval Status Not Available	
	Attachments		
3 Visited	You have not added any Attachments.		
4 Budget Incumbents Visited	Add Attachment		
5 Review and Submit Not Started			

2. Select My Device.

File Attachment	×
Choose From Wy Device	

3. Search and select the document to attach.

4. Select Open.

🧿 Open									\times
$\leftarrow \rightarrow \cdot \cdot \uparrow$	•	This PC	> Desktop > INFORMS R2 > HR Guide >	Attachments	ٽ ~	,⊂ Search	Attachme	nts	
Organize 🔻	New fo	older					-		?
len oneDrive		^ N	lame	Date modified	Туре	Size			
This DC		P	Comp Memo Establishing Position	7/8/2013 11:30 AM	Microsoft Edg	e P	52 KB		
		PC	📴 Compensation Memo for Jonathan Litt L	7/8/2013 11:30 AM	Microsoft Edg	e P	52 KB		
Deskton	5	PC	License Certification (12-1-21)	7/8/2013 11:30 AM	Microsoft Edg	e P	52 KB		
Document	e.								
Music									
Pictures									
📑 Videos									
🏪 Windows	(C:)								
🗙 SMB (\\s00	020154								
🛥 user app o	data (\	~							
	File	e <u>n</u> ame:	Comp Memo Establishing Position		~	All Files		,	~
						<u>O</u> pen		Cancel	

Lecture 1: Create New Position

5.	. Select Upload .					
6.	Select Done once the upload is complete.					
		File Attachment				
Cho	Choose From					
	My Device					
	Comp Memo Establishing Position.pdf File Size: 51KB					

7. In the **Description** field, enter a **brief description of the documentation**.

8. Select Next to go to Budget Incumbents - Step 4 of 5.

× Exit		Create Position				:
Position Number 00000000 Headcount Status Open Current Head Count 0						
					< Previous	Next >
1 Position Data Visited	Step 3 of 5: Attachments Effective Date 12/27/2021		Reason Code NEW New Position			
2 Additional Information Visited	Effective Sequence 0		Approval Status Not Available			
Attachments	Attachments					
Visited	Add Attachment					
4 Budget Incumbents Not Started	Attachments 0	Description \diamond	Attached By \Diamond	Attached \Diamond	Status 🗘	1 row
Review and Submit	Comp_Memo_Establishing_Position.pdf	Comp Memo Establishing (2) New Positions 12-27-21	Xavier Washington	12/27/21 10:21:47 AM	Active	Û
5 Not Started						

In the **Budget Incumbents** page (Step 4 of 5), users will review and leave defaulted items as is.

• Update Incumbents (Leave as Defaulted).

NOTE: When there are no incumbents in the position, the **Update Incumbents** field value must be set to **No** before submitting the request.

1. Select Next to go to Review and Submit – Step 5 of 5.

× Exit	Create Posi	lion	:
Position Number 00000000 Headcount Status Open Current Head Count 0		< Previou	s Next >
1 Position Data Visited	Step 4 of 5: Budget Incumbents Effective Date 12/27/2021	Reason Code NEW New Position	
2 Additional Information Visited	Effective Sequence 0 Current Budget	Approval Status Not Available	
3 Attachments Visited	Head Count 0 Current Budget FTE 0.00	Amount 0.000	
4 Budget Incumbents Visited	Incumbents		
5 Review and Submit Not Started	Include Salary PlaniGrade No Force Update for Title Changes No		
	Current Incumbents		
	No Incumbents to display.		_

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Upload Complete



Lecture 1: Create New Position In the **Review and Submit** page (Step 5 of 5), review the **Effective Date, Business Unit, Department, Job Code, Max Head Count, Reports to Position Number, Location Code,** and **Company** before selecting Submit.

1. Select Submit.

× Exit	Cre	ate Position
Position Number 00000000 Headcount Status Open Current Head Count 0		< Previous Submit
1 Position Data Visited	Step 5 of 5: Review and Submit	
2 Additional Information Visited	Effective Date 12/27/2021 Effective Sequence 0	Reason Code NEW New Position Approval Status Not Available
3 Attachments	Key Information	
Visited	Description	Proposed Value
4 Budget Incumbents Visited	Business Unit	PR
5 Review and Submit	Department	PR0800000
	Job Code	000459
	Max Head Count	2
	Reports To Position Number	00010781
	Location Code	PR00000001
	Company	MDC

The **Position Confirmation** page is displayed, and the new position request is successfully submitted pending the approval of the OMB Business Administrator (for Miami-Dade County) or the respective Constitutional Office Department Budget Administrator.

Notice the New Position Number issued.

	Position Confirmation	
V	The New Position Number 59000759 has been successfully submitted for approval.	
ew Position .	Approval	
- New Positi	on Pend	ling
New Positio	n Approval	
📓 Pending	3	
Multiple Appr OMB Admini	rovers strator	>
	uted	
🗵 Not Rou		

Lecture 2: Budget Approval

The OMB Budget Administrator and the Constitutional Office Department Budget Administrator are responsible for approving new position requests within INFORMS.

Navigate to Approvals: Select Approvals.



1. Select the New Position pending approval.

C HOME		Pending Approvals 1	ñ 🧐 :	MENU
View By Type 🗸	Ŧ			
Al 3	All		3 rows	s
Create Position 3	Create Position Data Entry Specialist 1	Position Number MD000033 New Position	Routed > 12/20/2021	
	Create Position Park Service Aide	Position Number TST00000 New Position	Routed > 12/21/2021	-
	Create Position HRIS Technician	Position Number 59000759 New Position	Routed > 12/22/2021]



Lecture 2: Budget Approval

- Notice the proposed position information is displayed.
 - 2. Select the **View Position Details** hyperlink to view the **details of the new position requested**.

C Pending Approvals	Create Position		A 🧐 : 🚍
Position Number 59000759 Title HRIS Technician			Approve Deny Pushback
Proposed Changes	Effective Date 1102/21 Effective Sequence 0 Reason Code NEW		
Description		Proposed	
Business Unit		PR	
Company		MDC	
Department		PR08000000	
Job Code		000459	
Location Code		PR00000001	
Max Head Count		2	
Reports To Position Number		00010780	
Additional Details Vew Position Details Attachment Details Attachments			
Approver Comments Approval Chain >			



Lecture 2: Budget Approval

A new tab will open displaying all the details of the new position request.

		View Position		🐔 🗣 i 🔜
Position Number 00033280 Headcount Status Open Current Head Count 0 of 0				
	Effective Date 10/15/2024			
	Effective Sequence 0			<< Previous Next >>
	Reason NEW New Position			
	Approval Status In Approval Process			
Position Information				
	Position Status Approved		Max Head Count 1	
	Status Active		Status Date 12/11/2024	
	Action Date 12/13/2024			
	Key Position No		Job Sharing Permitted No	
	Budgeted Position Yes		Non-Mayoral Yes	
	Senior Management No			
Job Information				
	Business Unit PA	Office of the Proprty Appraisr	Manager Level	
	Job Code 000102	Property Appraiser Clerk 1	All Other Positions	
	Regular/Temporary Regular		Full/Part Time Full-Time	
	Regular Shift Not Applicable		Union Code H Local199 - General Employees	
	Title Property Appraiser Clerk 1		Short Title Pa Cit 1	
			Description Nature of Work This is specialized clerical work in preparation	
March 1 and 1				
work Location	Des Desise 1101	Holed Mater	Ourset Dial Design	
	Reg Region USA	United States	Company PA. Property Appraiser	
	Department PA01010000	PROPERTY APPRAISERS OFFICE	Dol-Line formula Olympication	
	Location ID0000140	Stephen P. Clark Gov. Center	security clearance	
	Reports to 00012391	PROPERTY APPRAISER SUP 1 View Current Incompents		
	Supervisor LVI			
Salary Plan Information				
	Pay Plan		Grade 072	
	Salary Admin Plan H		Step	
	Standard Hours 80.00		Mon Tue Wed Thu Fri Sat Sun	
	Work Period B	Biweekly		
► USA				
Specific information Education and Government				
Budget and Incumbents				
Summary of Changes				



Lecture 2:
Budget
Approval

3. Select View **Attachments** to view any supporting documentation added to the request.

requesti					
	View Position	*	2	:	MENU
Position Number 000	33280				
Headcount Status Op	en				
Current Head Count 0 o	ř O				
▶ USA					•
Specific Information					
Education and Gove	rnment				
Budget and Incumber	ints				
Summary of Change	S				
 Attachments 					- 1
View Attachments					

An **Attachments** pop-up window displays.

4. Select the **attachment hyperlink** to view the supporting documentation.

	Attachments			×
Attachments				
				1 row
Attachments 🗘	Description ♦	Attached By \Diamond	Attached 🛇	
Comp_Memo_Establishing_Position.pdf	Comp Establishment of (2) New Positions (11-2-21)	Xavier Washington	12/22/21 01:38:02 PM	



Lecture 2: Once all supporting documentation is reviewed, the user is ready to Approve or Deny Budget the request. Approval

5. Select Approve.

NOTE: Enter comments as needed.

6. Select Submit.



Notice the Position is no longer in the Pending Approvals page.

	Pending Approvals	A 🤗 : 🛲
Ŧ		
All		2 rows
Create Position Data Entry Specialist 1	Position Number MD000033 New Position	Routed > 12/20/2021
Create Position Park Service Aide	Position Number TST00000 New Position	Routed > 12/21/2021 >



Lecture 3:Once the New Position request is fully approved, the DPR can validate the positionValidaterequest.PositionNewigete to Manage Desition Unique Description

Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position

- 1. In the Position Number field, enter the position number being validated.
- 2. Select Search.

C DPR Self-Service	Ма	nage/Create Position
✓ New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search		
	11	

The position information is displayed.

3. Select the **position being validated**.

C DPR Self-Service			Ma	nage/Create Positi	on				* :	5 11
	View Manage/Create	Position								
Position Number 59000759	Troome round.								Chart	No
Description	📰 🗄 + Add									1 row
Position Status	Position Number \Diamond	Description \Diamond	Reports To 🛇	Business Unit 🗘	Company O	Department O	Status 🌣	Job Code 이	Current Head Count \Diamond	
~	59000759	HRIS Technician	00010781	PR	MDC	PR08000000	Active	000459	0/2	
Reports To Position Number										
Search Clear										
PR (1)	E									
✓ Company										
MDC (1)										
✓ Department										
PR08000000 (1)										
✓ Status										
C Active (1)										
✓ Job Code										
000459 (1)										



Lecture 3: Validate Position

Notice the Status displays Approved.

4. Select the **Approval Chain** hyperlink to link to view the approvers.

C Search Results				Position Details						:
Position Number 5 Headcount Status 0 Current Head Count 0	9000759 Open I of 2									Clone
+										1 row
Effective Date 🗘	Effective Sequence 0	Reason \Diamond	Business Unit 🗘	Department 0	Job Code 🗘	Location 0	Status 🌣	Approval Chain 🗘		
12/27/2021	0	New Position	Parks, Recreation & Open Spcs	HUMAN RESOURCES	Hris Technician	1451 NW 67TH ST	Approved	Approval Chain	0	>

Notice that the appropriate approver, time, and dates the request was approved are displayed.

Create Position	×
New Position Approval	
- New Position	Approved
New Position Approval	
Approved	
Ulises Lincheta OMB Administrator 01/10/22 9:34 AM	>

The position is fully approved and ready for the DPR to add the Budget Funding.

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Lesson 1: Position Management

Lesson Summary

- Now that you have completed the lesson, you should be able to:
- Acquire knowledge of the Position Management Business Process
- Learn how to create new position requests
- Learn the Budget Approval Process
- Validate the New Position Request

	Lesson 2: Define Department/Position Budget Data
Lesson 2: Overview	At the conclusion of this lesson, you will be able to:
	• Learn how Department budget funding is established for new positions.
	• Learn how to update Department budget funding on existing positions.

• Learn how to inactivate Department budget funding for a position.


The Department Personnel Representative (DPR) is responsible for maintaining the Department Position Budget Funding in the Department Budget Table USA page. This includes adding, updating, or inactivating budget funding to positions accordingly.



Lesson 2: Introduction

The Department Budget Table is where designated users can add, update, or inactivate the budget funding of a position.

The Department Budget Table consists of five (5) tabs:

- Dept Budget Date the Fiscal Year and Budget Begin/End dates as well as the Suspense Combination code are defined here
- Dept Budget Defaults the Funding Defaults and Account Overrides are defined here
- Dept Budget Earnings, Dept Budget Deduction, and Dept Budget Taxes tabs must contain the same fields throughout. The following are defined here:
 - Effective Date The date the budget funding action begins for new positions The date when modifying the combination code for a position within a Fiscal Year and when the budget funding ends for inactive positions
 - Combination Code (Combo Code) The combination code is used to identify funding sources for the budget
 - Distribution The percentage allocated to combination code
 - o Sequence #1 the initial setup to fund all codes to the same funding string

The main Department Budget Table USA tabs needed **when adding the budget funding for a new position** are the following:

- Dept Budget Date
- Dept Budget Defaults
- Dept Budget Earnings

The main budget tabs needed **when updating the budget funding for a position** are the following:

- Dept Budget Earnings
- Dept Budget Deductions
- Dept Budget Taxes

NOTE: It is important to ensure that when updating the combination code for a position that the distribution percentage and combination code are the same across the three Dept Budget Earnings, Dept Budget Deductions, and Dept Budget Taxes tabs.

The main budget tab needed **when inactivating the budget funding** for a position is the Dept Budget Earnings tab.

NOTE: The position budget date needs to coincide with the beginning of the fiscal year.

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Lecture 1: Add Position Budget Funding Once the new position has been fully approved, the position is ready for the designated budget funding.

Navigate to Department Budget Table USA: Navigator > Human Capital Management (HCM) > Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA







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	NavBar: Navigator						
Fi	Finance / Supply Chain (FSCM)	Approvals	Budget	Scorecard	a fan fa	Product Related	Ŧ
	RUR	—	<u>0</u> 6		Recent Places	Daurall for North America	
	M EI		O	<u> </u>		Paylor for North America	,
		4				Commitment Accounting	>



- 1. Select the **Add a New Value** tab to add the budget funding for the new position.
- 2. In the Set ID field, ensure it is set to the Company/Department specific Set ID.

Set ID	Department				
AVIAT	Aviation Department				
PH	Public Housing & Community				
SF	CareerSource South Florida				
WASD1	Water & Sewer Department				
MDC	All other Miami Dade County and				
	Constitutional Office Departments				

3. In the **Department field**, enter the **Department ID ChartField used when creating** the new the position.

NOTE: The Department ID selected must be the same Department ID used when creating the new position.



Lecture 1: Add Position Budget Funding

4. In the Fiscal Year field, enter the Fiscal Year when the new budget funding will take place.

INFORMS Fiscal Year	Fiscal Year Dates
2025	FY 24-25 (10/1/24-9/30/25)
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

5. In the Budget Level field, select Position.

NOTE: Currently the budget funding is at the position level which means that on the job record there is a position assigned to employees.

- 6. In the **Position Number** field, enter the **Position Number for the new position that** requires the budget funding.
- 7. Select Add.

♦ HOME	Department Budget Table USA
Department Budget Table USA	
Eind an Existing Value Add a New Value	
Set ID MDC Q	
Department Q	
Fiscal Year 0	
Budget Level 🗸	
Position Pool ID Q	
Job Code Set ID Q	
Job Code Q	
Position Number Q	
Empl ID Q	
Empl Record 0 Q	
Add	



Lecture 1:The Dept Budget Date tab requires the Fiscal Year, *Offset Group, and the 03 CombinationAdd PositionCode for funding the new position.

- Budget
- Funding
- 1. Select the Dept Budget Date tab.
 - 2. In the ***Budget Begin Date** and ***Budget End Date**, to enter the Beginning and End Date for the Fiscal Year.

INFORMS Fiscal Year	Fiscal Year Dates
2025	FY 24-25 (10/1/24-9/30/25)
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

- 3. In the ***Offset Group**, select **MDC** for Miami Dade Offset.
- 4. In the **Suspense Combination Code** section, in the ***Effective Date** field, **enter the beginning date of the Fiscal Year**.

NOTE: The *Effective Date in the Suspense Combination Code is always the beginning date of the Fiscal Year.

5. Select the ChartField Details hyperlink to enter the Suspense Combination Code.

C Description	Department Budget Table USA
Dept Budget Date Dept Budget Defaults Dept Budget Earnings Dept Budget Deductions >	
Set ID MDC Department PR08000000 Fiscal Year 2022	HUMAN RESOURCES
*Budget Begin Date 10/01/2021 📰 *Budget End Date 09/30/2022	
*Offset Group MDC Q Miami Dade Offset	
Budget Cap	
Per Budget Level O Per Earn/Tax/Ded	
Suspense Combination Code Q 4 4 1	of 1 View All
*Effective Date 10/01/2021	+ -
Combination Code Cha	rtField Details
Balance 0.00	
Save Notify Add	Update/Display Include History
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Lecture 1: Add Position Budget Funding The ChartField Common 6. In the **Combinatio NOTE:** Each Depar

The ChartField Common Component pop up will be displayed.

6. In the **Combination Code** field, enter **SUSP_DEFAULT**.

NOTE: Each Department will have a Department Specific Suspension Combination Code.

7. Once the **ChartField Details** are loaded, select **Ok**.

ChartField D	Details													
		SUS	P_DEF	AULT	Q		Search C	ptions						
	Coml	ination Code					 Cor 	mbination Codes						
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ChartField Det	ail													
ChartField Deta	ail	Department		Account		Grant		PC Business Unit	Project	Activity	Source Type	Category	Subcategory	

Notice the Suspense Combination Code loaded. Review to ensure all fields are correct.

Department Budget Table US
C HOME Department Dadget table Cor
Dept Budget Date Dept Budget Defaults Dept Budget Earnings Dept Budget Defaults >
Set ID MDC Department PR08000000 HUMAN RESOURCES Fiscal Year 2022
"Budget Begin Date 10/01/2021
*Offset Group MDC Q Miami Dade Offset
Budget Cap
Per Budget Level O Per Earn/Tax/Ded
Suspense Combination Code Q 4 4 1 of 1 -> View All
*Effective Date 10/01/2021 📰 Effective Sequence 0
Combination Code SUSP_DEFAULT Default Suspense ChartField Details
Balance 0.00
Save Notify Add Update/Display Include History Dept Budget Date L. Dept Budget Defaults L. Dept Budget Earnings L. Dept Budget Deductions L. Dept Budget Taxes Earning State L. Dept Budget Defaults L. Dept Budget Earnings L. Dept Budget Deductions L. Dept Budget Date L. Dept Budget Defaults L.



Lecture 1:Select the Dept Budget Defaults tab.Add PositionEnsure in Funding Defaults the *Default Funding Source Option field is set to Distrib over
Actual Earnings.

Ensure the following fields are **selected** in the **Account Overrides** section:

- Use Acct Defined for Earnings
- Use Account Defined for Dedns
- Use Account Defined for US Tax
- Use Account Defined for Can Tax

♦ HOME				Department Budget Table USA					
Dept Budget Date Dept Bud	iget Defaults	Dept Budget <u>E</u> arnings	Dept Budget Deductions	>					
Set ID M *Budget Begin Date 11 01	IDC 0/01/2021	Department *Offset Group Budget Ca	PR08000000 HUMAN R MDC Q Miami Dade	RESOURCES Fiscal Year 2022 e Offset					
*Budget End Date			Per Budget Level	○ Per Earn/Tax/Ded					
Funding Defaults "Default Funding Source Exclusion Fring	ce Option Distr	ib over Actual Earnings	v D Fun	nding End Date Defaults From Funding Source					
Account Overrides	Earnings		✓ Use Account Define	ed for US Tax					
✓ Use Account Defined	for Dedns		Use Account Define	ed for CanTax					
Save Notify Add Update/Display Include History									

Lecture 1: Add Position Budget Funding

Select the Dept Budget Earnings tab

Notice the **Position number** where the budget funding is being added.

1. In the Level section's *Effective Date field, enter the effective date of the beginning of the pay period of the employee's first paycheck.

NOTE: The Level Effective Date should be on or before the pay period beginning of the employee's first paycheck.

- 2. In the ***Status** field, select **Active**.
- 3. In the Earnings Distribution section, select the Combination Code tab.
- 4. In the ***Sequence Number** field enter **1**.
- 5. Hit the **Tab** key.
- 6. In the **Distribution %** field, enter **100**.

(HOME				Department Bud	dget Table US	A	
Dept Budget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budget Deductions	>			
Set ID MDC	Departmer Budget Begin Dat Budget End Dat ult Funding Source Optio	tt PR08000000 HUMAI a 10/01/2021 b 09/30/2022 n Distrib over Actual Earning:	N RESOURCES Offset Group MDC	Fiscal Budget Cap ® Per Budget Level	Year 2022	Per Eam/Tax/Ded	
Level					Q	1 of 1 🗸 🕨	View All
O Department	Position Pool tition Number 59000759 Effective Date 11/15/2022 get Level Cap on	☐ Jobco HR!: 1 Eff Seq 0.00	de Position S Technician 0 *Currency U	Appointment	Date Entered	03/04/2022	+ -
≣ Q						€ € 1-1 of 1 ♥	
Combination Cod	e Distributed	arning Code Description	Combination Code Description	Exclusion Fringe Group	Redirect Com	bo Code II▶	
Earnings Code	*Sequence Number Comb	bination Code	Funding End Date	Fiscal Year Budget Amount	Allow Overspend	Distribution %	
1 Q	1					100	•
Save Notify Dept Budget Date De	pt Budget Defaults Dept	Budget Earnings Dept Budg	get Deductions Dept Budge	t Taxes	Add	Update/Display Ind	clude History



Lecture 1: 7

Add Position

Budget

Funding

- 7. Select the **Combination Code Description** tab.
- 8. Select the ChartField Details hyperlink to select the Combination Code.

Department Budget Table USA Dept Budget Date Dept Budget Defaults Dept Budget Earnings Dept Budget Deductions Set ID MDC Department PR08000000 HUMAN RESOURCES Fiscal Year 2022 Offset Group MDC Budget Begin Date Budget Cap 10/01/2021 Budget End Date 09/30/2022 Per Budget Level OPer Earn/Tax/Ded Default Funding Source Option Distrib over Actual Earnings Q | | ≪ 1 of 1 ~ > > | | View All Level Department Position Pool Jobcode Position Appointment + || - |Position Number 59000759 *Effective Date 11/15/2021 HRIS Technician *Status Active ~ Eff Seq 0 Date Entered 03/04/2022 Budget Level Cap *Currency USD Q 0.00 Earnings Distribution 4 1-1 of 1 🗸 🕨 III Q Þ Combination Code Distributed Earning Code Description Combination Code Description Exclusion Fringe Group Redirect Combo Code II▶ Earnings Code *Sequence Number **Combination Code** Combination Code Description **ChartField Details** ChartField Details 1 Q 1 +1_ Save Notify Add Update/Display Include History pt Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Ta

The **ChartField Common Component** is now displayed. The Combination Code consists of a list of selected ChartField strings with the Fund Code, Department, Account, and Grant information as well as the Project Costing (PC) Business Unit, Project, and Activity for departments that use INFORMS Project Costing. The Combination Code is administered by Central Finance.

NOTE: If you do not know the Combination Code select the Search button to search with any specific ChartField Detail field. If there is no Combination Code with specific ChartFields required for that position, contact Central Finance to assist with creating the new Combination Code.

9. Select **Search** to locate the Combination Code.

	ChartField Common Component										
ChartEield Details									Help		
Chartered Details											
		Q	Search C	ptions							
Com	bination Code		 Cor 	mbination Codes							
					Search						
ChartField Detail											
Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory		
٩	٩	٩	٩	٩	٩	٩	Q	٩	٩		
Ok	Cancel										



- Lecture 1: 10. Enter the **ChartFields** and select **Search**. Add
- The Combination Code ChartFields displays.
 - 11. Select the **Select** button **to load the Combination Code**.
- Budget Funding

				:	Search Combinat	tion Codes					×
											Help
	GL Combination Cod	e	Q								
Search by ChartFie	lds										
Fund 0	ode G4001	Q	Source Type	٩		ChartField 2	۹				
Departs	PR08010000	Q	Category	٩		ChartField 3	Q				
Acc	ount 5001100000	Q	Subcategory	Q		Product	Q				
G	rant NO-GRANT	Q	Fund Affiliate	٩							
PC Business	Unit	Q	Grant Affiliate	٩							
Pn	ject	Q	Affiliate	۹							
Act	vity	Q	ChartField 1	Q							
Search	Clear C	ancel									
Combination Code	ChartFields										
er q											
Sele	t GL Combo Cod	•	Account	Department	Project	Product	Fund Code	Affiliate	Grant	ChartField 1	ChartField 2
1 Sele	at 000000815		5001100000	PR08010000			G4001		NO-GRANT		

Notice the Combination Code is now loaded in the Combination Code field.

12. Select Save.

(HOME					Department B	udget Table USA			
Dept Budget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budget Deducti	ions >					
Set ID MDC	Department Budget Begin Date	PR08000000 HUMAN	RESOURCES Offset Group MDC		Fiscal	Year 2022			
	Budget End Date	09/30/2022			Per Budget Level	I OPer Earn/Ta	ax/Ded		
Defau	It Funding Source Option	Distrib over Actual Earnings							
Level						Q 4 4 1 of 1	*		View All
 Department Posit 	OPosition Pool	Jobcod	e Position Technician	n	○ Appointment				+ -
*E Budg	ffective Date 11/15/2021 et Level Cap	Eff Seq	0 *Status *Currency	Active	•	Date Entered 03/04/2022			
	n					H 4	1-1 of 1	-	
Combination Code	Distributed Ea	rning Code Description	ombination Code Desc	ription	Exclusion Fringe Grou	p Redirect Combo Code	⊪		
Earnings Code	*Sequence Number	Combination Code	C <u>o</u> mbi	nation Cod	e Description	ChartField Details			
1 Q	1	000000815	EMPLC	YEE REGU	JLAR	ChartField Details		+	-
Save Notify Dept Budget Date Dep	ot Budget Defaults Dept	Budget Earnings Dept Budg	jet Deductions Dept E	Budget Taxe	s	Add Update/Disp	blay	Include	History



Lecture 1:Notice the Dept Budget Deductions and Dept Budget Taxes pages automatically have theAddSequence, Distribution %, and Combination Code entered.

Position Budget Funding

			Department	Budget lable USA				🐔 Q, 契 🗄
Dept Budget Defaults Dept Budget Earni	ings Dept Budget Deducti	ons Dept Budget Taxes						New Window Help Person
Set ID MDC Department Budget Begin Date Default Funding Source Option	PR08000000 HUMAN RESI 10/01/2021 Distrib over Actual Earnings	OURCES Budget End Date 09/30/202	Fis 22 Offse	scal Year 2022 et Group MDC				
Level							Q I	1 of 1 v)
Department O Position Pool Position Number 590 Effective Date 11/1	Jobcode 00759 HRIS Tech 5/2021 Eff Seq	Position nician 0 Status Activ	O Appointment	Date Entered 03/04	+ -			
eduction Distribution								1-1 of 1 🗸 🗎
Combination Code Eringe Benefit Descri	iption Combination Code De	escription Distributed	₽		_			
Plan Type	Plan Deduct	tion Code Deduction Class	*Sequence C Number	Combination Code	Override	Funding End Date	Fiscal Year Budg Amour	et Distribution %
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								New Window
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E Dept Budget Defaults Dept Budget E Set ID MDC Departmen Budget Begin Dat Default Funding Source Optio	armings Dept Budget Dec nt PR08000000 HUMAN te 10/01/2021 m Distrib over Actual Earning	INCLIONS Dept Budget RESOURCES Budget End Date 01 IS	Taxes 3/30/2022	Fiscal Year 2022 Offset Group MDC			Q. 4	New Window
Dept Budget Defaults Dept Budget E Set ID MDC Departmen Budget Begin Dat Default Funding Source Optio evel Department Position Pool Position Number 5900075 Effective Date 11/15/20; ax Distribution	amings Dept Budget Dec nt PR0800000 HUMAN te 1001/2021 in Distrib over Actual Earning 4 Jobecol 9 HRIS Tec 21 Eff Seq 0	Juctions Dept Budget IRESOURCES Budget End Date () is le Position hnician Status Active	Taxes 9/30/2022 Appol	Fiscal Year 2022 Offset Group MDC intment Date Entered 0;	+		Q 4	New Window
	amings Dept Budget Dec nt PR08000000 HUMAN te 10/01/2021 in Dishb over Actual Earning 4 Jobcod 9 HRIS Tec 21 Eff Seq 0 on Cgmbination Code De	Juctions Dept Budget IRESOURCES Budget End Date Of Is le Position hnician Status Active escription Distributed	Taxes)/30/2022 ○ Appol P	Fiscal Year 2022 Offset Group MDC	4042022]	Q ⊨ ⊮	New Window
Dept Budget Defaults Dept Budget E Dept Budget Defaults Dept Budget E Budget Begin Dar Default Funding Source Optio evel Department Position Number 5900075 Effective Date 11/15/20 ax Distribution Q Combination Code Locality Descriptic State Tax Class	amings Dept Budget Dec nt PR08000000 HUMAN te 10/01/2021 in Distrib over Actual Earning 4 Jobcod 9 HRIS Tec 21 Eff Seq 0 on Cgmbination Code De Locality	tuctions Dept Budget IRESOURCES Budget End Date 01 Is Ile Position Inician Status Activ Iscription Distributed y Sequence	Taxes i/30/2022 Appol i/ Combination	Fiscal Year 2022 Offset Group MDC intment Date Entered 0;	4042022	ding End	Q 4	New Window I 1011 v Image: Imag
Dept Budget Defaults Dept Budget E Set ID MDC Departmen Budget Begin Data Default Funding Source Option evel - Department Position Poor Position Number 5900075 Effective Date 1/1/15/202 ax Distribution E Eg Q Combination Code Locality Description 1 Q	amings Dept Budget Dec nt PR08000000 HUMAN te 1001/2021 in Distrib over Actual Earning 4 Jobecol 9 HRIS Tec 21 Eff Seq 0 on Combination Code De Localit	Juctions Dept Budget IRESOURCES Budget End Date Of Is le Position hnician Status Active scription Distributed y Sequence Number Q 1	Taxes	Fiscal Year 2022 Offset Group MDC Intment Date Entered 0;	+ 804/2022 Override Fut Dat	ding End	Q 14	New Window 4 1 of 1 • > I Id 4 1-1 of 1 • > Distribution %

The Position Budget Funding has been successfully loaded to the new position.



Department Budget Table USA

Lesson 2: Define Department/Position Budget Data

Lecture 2: Navigate to Department Budget Table USA: NavBar: Navigator > Human Capital

Management (HCM) > Set Up HCM > Product Related > Commitment Accounting > Budget

- Update Information > Department Budget Table USA
 Position
- Department Budget Table USA

 Fundings

 Department Budget Table USA

 Enter any Information you have and cick Statch. Lave fetth blank for a list of all value.

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 Image: Control information you have and cick Statch. Lave Have Jabe
 - 1. Select the **Find an Existing Value** tab to update the budget funding for a position.
 - 2. In the Set ID field, ensure it is set to the appropriate Department's Set ID.

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Miami-Dade County and
	Constitutional Office Departments

- 3. In the **Department field**, enter the **Department ChartField related to the position**.
- 4. In the Fiscal Year field, enter the Fiscal Year when the new budget funding will take place.

INFORMS Fiscal Year	Fiscal Year Dates
2025	FY 24-25 (10/1/24– 9/30/25)
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

- 5. In the **Position Number** field, enter the **Position Number for the active position that** requires the new budget funding.
- 6. Select Search.

Funding



Lesson 2: Define Department/ Position Budget Data

Lecture 2: In the **Dept Budget Earnings** page users are responsible for updating the ***Effective Date**, Update *Sequence Number, Distribution percentage and the new Combination Code of the Position position. Budget

1. Select the Dept Budget Earnings tab.

2. On the Level Section, select the plus sign (+) to enter the *Effective Date which is the date of the beginning of the pay period the new funding will be effective.

NOTE: The Effective Date must be the date of the beginning of the Pay Period of that specific week and must fall within the Budget Begin Date and Budget End Date.

- 3. In the Earnings Distribution section, in the *Sequence Number field, enter 1 as the sequence number.
- 4. In the Distribution % field, enter the percentage of the distribution.

< Human Resources (HCM)			Department Budget Tab	le USA								
Dept Budget Date Dept Budget Defaults	Dept Budget Earnings Dep	ot Budget Deductions										
Set ID MDC Department Budget Begin Date	CH00000000 COMM.ACTION 0ffset 10/01/2020	N & HUMAN SRVC. DPT. t Group MDC	Fiscal Year 202 Budget Cap	1								
Budget End Date 09/30/2021												
Default Funding Source Option	Distrib over Actual Earnings											
Level			Q	1 of 2 🗸 🕨	I View All							
O Department O Position Pool	Department Position Pool Jobcode Position Appointment + - - - - - - - - - - - - - - - <li< td=""></li<>											
Position Number 00000881 *Effective Date 06/28/2021 Budget Level Cap 9,999,999	SOCIAL WO Eff Seq 0 9,999.00	RKER AIDE *Status Active *Currency USD (Date Ente	red 02/17/2022								
Earnings Distribution												
₩ Q				I¶ ¶ 1-1 of 1 ∨								
Combination Code Distributed Ea	arning Code Description Combin	ation Code Description	Exclusion Fringe Group Redire	ct Combo Code II▶								
Earnings Code [*] Sequence Number Cor	mbination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %								
1 Q 1 00000199 🛗 100.000 + -												
Save Return to Search Notify Include History Include History												
Dept Budget Date Dept Budget Defaults Dept B	Budget Earnings Dept Budget Dedu	uctions Dept Budget Taxe	25									



Lecture 2: Update Position Budget Funding

- 5. Select the **Combination Code Description** tab to update the current budget funding and select the new Combination Code.
- 6. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

C Human Resources	(HCM)					Department Bu	dget Table USA				
Dept Budget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budge	et Deductions	>						
Set ID MDC	Departmen Budget Begin Date	t CH00000000 COM	M.ACTION & HUM Offset Group	AN SRVC. DPT. MDC		Fiscal Ye Budget Cap	ear 2021				
Defau	Budget End Date	9 09/30/2021 Distrib over Actual Earnir	ngs			Ser Buaget Level	U Per	Earn/ lax/Ded			
Level							Q 4 4	1 of 2 🗸	View All		
O Department Posit "E Budg	Level Q I I I I Department Position Pool Jobcode Position Appointment I										
⊑ Q							I		1 • •		
Combination Code	Distributed Ea	rning Code Description	Combination Co	de Description		Exclusion Fringe Group	Redirect Combo	Code III			
Earnings Code	*Sequence Number	Combination Code		Combination	Code	Description	ChartField Details				
1 Q	1	000000199		EMPLOYEE R	EGUI	LAR	ChartField Details		+ -		
Save Return to Dept Budget Date Dep	Return to Search Notify Budget Date Dept Budget Defaults Dept Budget Earnings Dept Budget Deductions Dept Budget Taxes										

Lecture 2:The ChartField Common Component is now displayed. The Combination Code consists of
a list of selected ChartField strings with the Fund Code, Department, Account, and GrantPositioninformation as well as the PC Business Unit, Project, and Activity for departments that use
Project Costing. The Combination Code is created and administered by Central Finance.

NOTE: If you do not know the Combination Code select the **Search** button to search with any specific ChartField Detail field. If there is no Combination Code with specific ChartFields required for that position, contact Central Finance to assist with creating a new Combination Code.

- 7. In the **Combination Code** field, enter the **Combination Code with the proper ChartField details for the position**.
- 8. Select Ok.

Funding

					ChartField Commo	on Component					×
ChartField De	tails									н	.elp 🔶
		000000200	۹	Search O	ptions						
	Comb	vination Code		 Con 	nbination Codes						
						Search					
ChartField Detail	I										
Fund Code		Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	
SC001	Q	CH01010101 Q	5001100000 Q	NO-GRANT Q	٩	٩	٩	٩	٩		۹
Ok	C	ancel									

Notice the updated Combination Code and Combination Code Description.

HOME						De	partmer	nt Budget Table	e USA		
Dept <u>B</u> udget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budge	et <u>D</u> eductions	>						
Set ID MDC	Department Budget Begin Date	CH00000000 COMM.#	ACTION & HUM Offset Group	AN SRVC. DPT. MDC		Fiscal '	Year 20	21			
Budget End Date 09/30/2021 Default Funding Source Option Distrib over Actual Earnings											
Level							QI	1 of 2	•	►	View
O Department Positi *El Budge	Position Pool O0000881 G6/28/2021 t Level Cap	Jobcod SOCI Eff Seq 9,999.00	e ®	Position DE *Status Activ urrency USD	ve Q	Appointment	Date Ent	tered 02/17/2022			+ -
Earnings Distribution	n							∢ ∢ [1-1 of 1	v •	
Combination Code	<u>D</u> istributed <u>E</u> ar	rning Code Description	ombination Co	de Description		Exclusion Fringe <u>G</u> rou	p <u>R</u> e	direct Combo Code			
Earnings Code	*Sequence Number	Combination Code		Combination	Code	e Description	ChartFie	ld Details			
1 Q 1 000000200 EMPLOYEE REGULAR ChartField Details										+	-
Save Return to	Search Notify	Budget Earnings Dept Budg	get Deductions	Dept Budget 1	Taxes	5	Ad	dd Update/Dis	play	Incluc	le History



Lecture 2: Update Position Budget

Funding

- 1. Select the **Dept Budget Deductions** tab.
 - 2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1**.

In the **Dept Budget Deductions** page users are responsible for updating the ***Sequence**

Number, Distribution Percentage and the new Combination Code of the position.

3. In the Distribution % field, enter the percentage of the distribution.

C Human Resources (HCM)					Department Budget Table	e USA				Â
Dept Budget Date Dept Budget Defaults	Dept Budget <u>E</u> arnings	Dept Budget	Deductions	•					N	lew Window
Set ID MDC Department	CH00000000 COMM	ACTION & HUMAN	I SRVC. DPT.		Fiscal Year 2021					
Budget Begin Date Default Funding Source Option	10/01/2020 Distrib over Actual Earni	Budget End	Date 09/30/202	!1	Offset Group MDC					
Level								Q H	1 of 1 v 🕨 👘 👘	View All
Obepartment Position Pool Position Number 0000 Effective Date 06/28 Deduction Distribution	Jobco 0881 SO 3/2021 Eff So	ode ® P CIAL WORKER AIDE eq 0	osition E Status Active	O Appointn	nent Date Entered 02/17/202	+ -				
Combination Code Eringe Benefit Descrip	otion Combination	Code Description	Distributed	⊪	_				I I-1 of 1 ♥ ►	M
Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %	
1	٩	Q,	٩	1	00000200				100.000 +	-
Save Return to Search Notify Dept Budget Date Dept Budget Defaults Dept Bu	udget Earnings Dept E	Budget Deductions	Dept Budget Tax	es				Add	Update/Display Include	History

- 4. Select the **Combination Code Description** tab to update the current budget funding and select the new Combination Code.
- 5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

C HOME				Departme	ent Budget Table US	A	A Q
Dept Budget Date	Dept Budget Defaults	Dept Budget Earnings	Dept Budget Deductions				New Window Help
Set ID MDC Defaul	Department Budget Begin Date t Funding Source Option	CH00000000 COMM.A 10/01/2020 Distrib over Actual Earnings	CTION & HUMAN SRVC. DPT. Budget End Date 09/30/202	11 0	Fiscal Year 2021 Offset Group MDC		
Level							Q, 4 4 1 of 2 • 1 View All
Department	Position Pool Position Number 0000 Effective Date 06/2 on Fringe Benefit Descript	Jobcode 00881 SOCI/ 8/2021 Eff Seq tion Combination Co	Position UWORKER AIDE 0 Status Active e Description Distributed	O Appointmei	nt Date Entered i	+ - 02/17/2022	4
Plan Type	2	Plan De	duction Code Deduction Class	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	~	٩	٩	1	000000199	EMPLOYEE REGULAR	ChartField Details
Save Return to Dept Budget Date Dep	Search Notify t Budget Defaults Dept B	udget Earnings Dept Buc	get Deductions Dept Budget Tax	ies			Add Update/Display Include History



Lecture 2: The **ChartField Common Component** is now displayed.

- Update Position Budget Funding
- 6. In the **Combination Code** field, enter the same **Combination Code entered on the Dept Budget Earnings page**.
- 7. Select Ok.

	ChartField Common Component													×	
ChartField De	etails														Help
		000	000200		Q	1	Search O	ptions							
	Comb	oination Code				1	Con	nbination Codes							- 1
									Search						
ChartField Detai	il														_
Fund Code		Department		Account		Grant		PC Business Unit	Project		Activity	Source Type	Category	Subcategory	
SC001	Q	CH01010101	Q	5001100000	Q,	NO-GRANT	Q,	٩		Q	٩	٩	٩		۹
Ok		ancel													_

Notice the updated Combination Code and Combination Code Description listed.

8. Select the **Expand Icon (>)** to expand the submenu navigation and select the **Dept Budget Taxes** tab.

O HOME				Departme	ent Budget Table USA			ñ	Q,			
Dept Budget Date	Dept Budget Defaults	Defaults Dept Budget Earnings Dept Budget Deductions >										
Set ID MDC Department CH00000000 COMM.ACTION & HUMAN SRVC DPT. Fiscal Year 2021 Budget Begin Date 10/01/2020 Budget End Date 09/30/2021 Offset Group MDC Default Funding Source Option Distrib over Actual Earnings												
Level						Q	1 of 2 ♥ ▶	.∎ I	View All			
Department Deduction Distribution Q Combination Code	Department Position Pool Jobcode Position Appointment + Position Number 0000881 SOCIAL WORKER AIDE Effective Date 06/28/2021 Eff Seq 0 Status Active Date Entered 02/17/2022											
Plan Type		Plan De	duction Code Deduction Class	*Sequence Number	Combination Code	Combination Code Description	ChartField Details					
1	~	٩	٩	1	000000200	EMPLOYEE REGULAR	ChartField Details	+	-			
Save Return to Dept Budget Date Dep	Save Return to Search Notify Add Update/Display Include History ept Budget Date Dept Budget Defaults Dept Budget Taxes											



- Lecture 2:In the Dept Budget Taxes page users are responsible for updating the *SequenceUpdateNumber, Distribution Percentage, and Combination Code of the position.
- Position
- Budget
- Funding
- 1. Select the Dept Budget Taxes tab.
- 2. In the Earnings Distribution section, in the *Sequence Number field, enter 1.
- 3. In the **Distribution %** field, enter the **percentage of the distribution**. (The percentage is always 100%.)

() H	luman Resoui	rces (HCM)			Departr	nent Budget Ta	able USA			
<	Dept Budget	Defaults Dept Budget Earn	ings Dept Budget Deductions	Dept Budget Taxes						
	Set ID MD	DC Department Budget Begin Date efault Funding Source Option	CH00000000 COMM.ACTION & H 10/01/2020 Budg Distrib over Actual Earnings	IUMAN SRVC. DPT. et End Date 09/30/202	Fiscal Year 1 Offset Group	2021 MDC				
Lev	rel							Q I H	1 of 2 🗸 🕨 🕨	I View All
0[Pepartment	O Position Pool Position Number 00000881 Effective Date 06/28/2021	Jobcode SOCIAL WORKER AI Eff Seq 0	 Position DE Status Active 	○ Appointment Date Ente	red 02/17/2022	+ -			
	Combination	Code	Combination Code Description	Distributed >					€ € 1-1 of 1 ∨	
	State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %	
1	٩		~ a	1	00000200				100.000	+ -
Sa Dept 8	ve Retu Budget Date	rn to Search Notify Dept Budget Defaults Dept Bu	udget Earnings Dept Budget Deduc	tions ∣ Dept Budget Tax	185			Add	Update/Display Inc	clude History

- 4. Select the **Combination Code Description** tab to update the current budget funding and select the new Combination Code.
- 5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

)ept Budget D	eductions			Department Budget	Table USA		1
<	Dept Budget	Defaults Dept Budget Earning	ngs Dept Budget Deductions	Dept Budget Taxes				New Win
	Set ID MD	C Department Budget Begin Date fault Funding Source Option	CH00000000 COMM.ACTION & I 10/01/2020 Budg Distrib over Actual Earnings	HUMAN SRVC. DPT. et End Date 09/30/202	Fiscal Year 1 Offset Group	2021 MDC		
Le	vel						Q 1 of 2 🕶 🕨	I View All
Тал	Department	Position Number 00000881 Effective Date 06/28/2021	SOCIAL WORKER A	Position IDE Status Active	O Appointment	+ -		
	Combination C	ode	Combination Code Description	Distributed III			I€ € 1-1 of 1	
	State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description	
	٩		~	٦ 1	000000199	ChartField Details	EMPLOYEE REGULAR	+ -
Dept	ave Retu Budget Date	rn to Search Notify Dept Budget Defaults Dept Bu	udget Earnings Dept Budget Deduc	tions Dept Budget Ta:	xes		Add Update/Display	Include History



Lecture 2: The **ChartField C**

Update Position Budget Funding

- The ChartField Common Component is now displayed.
 - 6. In the **Combination Code** field, enter the same **Combination Code entered on the Dept Budget Earnings** page.
 - 7. Select Ok.

					ChartField Comm	ion Component				×
ChartField E	Details									Help
	Com	00000020	D	کے Sear	ch Options					
	Com	Smatton Gode				Search				
Chart-field Det.	tail									
Fund Code	tail	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
Fund Code	Q	Department CH01010101 Q	Account 5001100000	Grant NO-GRANT	PC Business Unit	Project Q	Activity	Source Type	Category Q	Subcategory
Fund Code SC001	tail م	Department CH01010101 Q Cancel	Account 5001100000 0	Grant NO-GRANT	PC Business Unit	Project Q	Activity Q	Source Type	Category Q	Subcategory

Notice the updated Combination Code and Combination Code Description listed.

8. Select the **View All** hyperlink to view the budget funding changes.

K H	luman Resour	ces (HCM)				Depa	rtment Budget Table USA		
<	Dept Budget	De <u>f</u> aults Dept Budget <u>E</u> ar	nings Dept E	udget <u>D</u> eductions	Dept Budget Taxes	5			
	Set ID MD	C Department	CH00000000	COMM.ACTION & H	JMAN SRVC. DPT.	Fiscal Yea	ır 2021		
	De	Budget Begin Date fault Funding Source Option	10/01/2020 Distrib over Actua	Budge Il Earnings	t End Date 09/30/20	21 Offset Grou	p MDC		
Lev	rel							Q 4 4 1 of 2 🗸 🕨	▶ I View All
0)epartment	O Position Pool		Jobcode	Position	O Appointment	+ -		
	I	Position Number 00000881 Effective Date 06/28/2021	Eff Se	SOCIAL WORKER AIE	DE Status Active	Date En	tered 02/17/2022		
Tax	Distribution							I 1-1 of 1	✓ ▶ ▶
	Combination C	ode	Combination	Code Description	<u>D</u> istributed ▶				
	State	Tax Class		Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description	
1	٩		~	٩	1	00000200	ChartField Details	EMPLOYEE REGULAR	+ -
Sa Dept B	ve Retur	n to Search Notify Dept Budget Defaults Dept I	Budget Earnings	Dept Budget Deducti	ons Dept Budget T	axes		Add Update/Display	Include History



Lecture 2: Update Position Budget Funding

The page expands to display new and historic information. Notice the two different **Effective Dates, Date Entered**, and **Combination Code** of the two records.

9. Review the changes and select **Save**.

() H	luman Resourc	es (HCM)				Departi	ment Budget Table USA		
<	Dept Budget I	De <u>f</u> aults Dept Budget <u>E</u> arnin	gs Dept B	udget Deductions	Dept Budget Tax	98			
	Set ID MDO	Department (Budget Begin Date 1 fault Funding Source Option [CH0000000 0/01/2020 Distrib over Actua	COMM.ACTION & H Budge Il Earnings	UMAN SRVC. DPT. t End Date 09/30/2	Fiscal Year 2021 Offset Group	2021 MDC		
Lev	rel							Q 4 4 1-2 of 2 🗸	▶ ▶ I View 1
⊖ c Tax	Obepartment Position Pool Jobcode Position Appointment Position Number 00000881 SOCIAL WORKER AIDE Effective Date 06/28/2021 Eff Seq 0 Status Active Date Entered 02/17/2022								
Π	, Q							€ € 1-1 o	1 🗸 🗼 👘
	Combination C	de Locality Description	Combination	Code Description	Distributed	»			
	State	Tax Class		Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description	
1	Q,		~	٩	. 1	00000200	ChartField Details	EMPLOYEE REGULAR	+ -
⊙ [Tax	Department F Distribution	OPosition Pool osition Number 00000881 Effective Date 10/01/2020	C S Eff Se) Jobcode SOCIAL WORKER AII q 0	Position DE Status Active	O Appointment	+ -		
Π	, Q							4 1-1 of 1 🗸	
	Combination C	de <u>L</u> ocality Description	Combination	Code Description	Distributed II	>			
	State	Tax Class		Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description	
1	Q		~	۹	1	000000199	ChartField Details	EMPLOYEE REGULAR	+ -
Sa	ve Retur	n to Search Notify						Add Update/Display	Include History

10. The Updating Budget Funding process is now complete.

Funding



Lesson 2: Define Department/ Position Budget Data

Lecture 3:When inactivating the budget funding of a position users must ensure the position wasInactivatefully approved and inactivated via Position Management before inactivating the budgetPositionfunding. There cannot be an incumbent in the position if the position is deactivated and
defunded.

Navigate to Department Budget Table USA: Navigator > Human Capital Management (HCM) > Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

 Select the Find an Existing Value tab to update the budget funding for a position. In the Set ID field, ensure it is set to the appropriate Company/Department's Set ID.

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Miami-Dade County and
	Constitutional Office Departments

 In the Department field, enter the Department ChartField related to the position. In the Fiscal Year field, enter the Fiscal Year when the budget funding is to become inactive.

INFORMS Fiscal Year	Fiscal Year Dates
2025	FY 24-25 (10/1/24– 9/30/25)
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

3. In the **Position Numbe**r field, enter the **Position Number** of the position that is being inactivated.



- Lecture 3: Inactivate Position Budget Funding
- 4. Select Search.

C HOME			Department Budget Table USA
Department B	udget Table USA		
Enter any information	on you have and click Sea	rch. Leave fields blank for a list of all valu	es
	,		And the
Find an Exist	ing Value <u>A</u> dd a Ne	w Value	
Search Criteria	1		
Set ID	= 🗸 MDC	٩	
Department	begins with 🖌	Q	
Fiscal Year	= •		
Budget Level	= ~	~	
Position Pool ID	begins with 🖌	Q	
Job Code Set ID	begins with v	Q,	
Job Code	begins with 🖌	Q	
Position Number	begins with 🖌	٩	
Empl ID	begins with v	Q	
Empl Record	= •	Q	
Include History			
Search Cle	ear Basic Search	Save Search Criteria	

Select the Dept Budget Earnings tab.

- On the Level Section, select the Plus (+) button to enter the *Effective Date which is the date the of budget funding activation.
 NOTE: The Effective Date must be the date of the end of the Pay Period the user intends to inactivate budget funding, plus 1. The date must fall within the Budget Begin Date and Budget End Date.
- 6. In the ***Status** field, select **Inactive**.
- 7. Select Save.

					Department Budg	jet Table USA		
Dept Budget Date	Dept Budget Defaults	Dept Budget Earnin	gs Dept Budget Dedu	ctions >				
Set ID MDC	Departme Budget Begin Da	nt CH00000000 CO .te 10/01/2020	MM.ACTION & HUMAN SR Offset Group MDC		Fiscal Year Budget Cap	2021		
	Budget End Da	/te 09/30/2021			Per Budget Level	⊖Per Eam/Ta	ax/Ded	
Defaul	t Funding Source Optic	on Distrib over Actual Earr	nings					
evel					(Q, I II II II 1 of 2	× ► H	View
'Ef	fective Date 08/09/202	21 III Eff Se	rq 0	us Inactive	✓ Date	te Entered 02/25/2022		
Budg	at never cap 9,999,1	333,333.00	Culture	cy USD Q				
Budgi	Distributed E	arning Code Description	Combination Code Des	cy USD Q	Exclusion Fringe Group	Redirect Combo Code	1-1 of 1 ∨ ▶	
Budgi arnings Distribution Q Qombination Code Earnings Code	Distributed E Sequence Number	arning Code Description	Combination Code De	cy USD Q scription bination Code	Exclusion Fringe Group Description Ch	Redirect Combo Code	1-1 of 1 v b	►
Budg Earnings Distribution Combination Code Earnings Code 1 Q	Distributed E Support 1	arning Code Description Combination Code 000000200	Combination Code Dec Com EMPI	cy USD Q	Exclusion Fringe Group Description Cft LAR Cft	Redirect Combo Code artField Details	1-1 of 1 > >	•

The position's budget funding is now inactive, and the Inactivate Position Budget Funding process is complete.

Lecture 3: Inactivate Position Budget Funding

- 8. Select the **Dept Budget Earnings** tab.
- 9. On the **Level** Section, select the **Plus (+)** button to enter the ***Effective Date** which is the date the of budget funding activation.

NOTE: The Effective Date must be the date of the end of the Pay Period the user intends to inactivate budget funding, plus 1. The date must fall within the Budget Begin Date and Budget End Date.

10. In the ***Status** field, select **Inactive**.

TIOME					Departr	nent Budget 1	Table USA	
Dept Budget Date	Dept Budget Defaults	Dept Budget Earn	iings Dept E	Budget Deductions	>			
Set ID MDC	Departmer Budget Begin Dat	nt CH00000000 C e 10/01/2020	COMM.ACTION & Offset Gi	HUMAN SRVC. DPT. roup MDC	Budget Cap	Fiscal Year 2	021	
	Budget End Dat	e 09/30/2021			Per Bud	get Level	OPer Earn/Ta	x/Ded
Defau	It Funding Source Optio	n Distrib over Actual E	amings					
evel						Q	1 of 2	► ► ► ► ► ▼
Department	O Position Pool	Ο.	Jobcode	Position		tment		+
Department Positi Budg	Position Pool ion Number 00000881 ffective Date 08/09/202 et Level Cap 9,999,9	○、 1 ::: Eff 99,999.00	Jobcode Seq ()	Position Status Inact Currency USD	Appoint	tment Date Er	ntered 02/25/2022	+
Department	Position Pool ion Number 00000881. ffective Date 08/09/202 et Level Cap 9,999,9 n	○, 1 (1) 99,999.00	Jobcode Seq ()	 Position Status Inact *Currency USD 	⊂ Appoin	tment Date Er	ntered 02/25/2022	+ 1-1 of 1 → →
Department Positi E Budg minings Distribution Combination Code	Position Pool ion Number 0000881 ffective Date 08/09/202 et Level Cap 9,999,9 n Distributed E	1 Eff 99,999.00	Jobcode Seg 0	Position Status Inact Currency USD On Code Description	Appoin	tment Date Er nge <u>Q</u> roup	ntered 02/25/2022	+ 1-1 of 1 → ► ►
Department Positi Budg mings Distribution Combination Code Earnings Code	Position Pool ion Number 00000811 ffective Date 0809/202 et Level Cap 9,999,9 n Distributed Er *Sequence Number	1 III Eff 99,999.00	Seq 0	Position Status Inact Currency USD On Code Description Combination (Appoint	tment Date Er nge ⊊roup € ChartFi	edirect Combo Code	1-1 of 1 ~ > > >
Department Posit E Budg amings Distribution	Position Pool ion Number 0000881 ffective Date 0809/202 et Level Cap 9,999,9 n Distributed E 'Sequence Number 1	1 III Eff 99,999.00 Eff arring Code Description Combination Code 000000200	Seq 0	Position Status Inact Currency USD Combination (EMPLOYEE Ri	Appoint	tment Date Er nge Group R ChartFit ChartFit	edirect Combo Code eld Details	+

11. Select Save.

The position's budget funding is now inactive, and the Inactivate Position Budget Funding process is complete.



Key Terms



The following key terms are used in this module:

Term	Definition
Combination Code	A key that defines a combination of ChartFields needed for Position Budget Funding.

Lesson Summary Now that you have completed the lesson, you should be able to:

- Learn how Department budget funding is established for new positions
- Learn how to update Department budget funding on existing positions
- Learn how to inactivate Department budget funding for a position



Lesson 3: Submitting Position Change Lesson 3: At the conclusion of this lesson, you will be able to: Overview • Modify a Position • Validate the Modification Request • Inactivate a Position

• Validate the Inactive Request



The Department Personnel Representative (DPR) is tasked to review and approve Employee Self-Service and Manager Self-Service transactions.

Additionally, the DPR is responsible for modifying positions as needed. Some position modifications are changing a position from Temporary to Regular, inactivating a position, changing reporting structure, position status changes, and position data updates.

There are two position effective dates:

- Top of Stack If the position effective date is equal to or greater than the Job effective date, INFORMS automatically updates the Job record once approved.
- Historical Row If the position effective date lands in between the Job effective dates, the position row is not added. The Job record must be manually updated by the HR Position Administrator.



Key Terms



The following key terms are used in this module:

Term	Definition
Historical Row	When a Position effective date lands in between Job effective dates, the position row is not be added. The Job record must be manually updated by the HR Position Administrator.
Top of Stack	When the position effective date is equal to or greater than a Job's effective date, INFORMS automatically updates the Job record once approved.



Lecture 1: Modify Position

The DPR can request modifications to positions that have been fully approved. Some modifications affect the effective date, such as changing the position from temporary to regular, inactivating a position, changing the reporting structure, and updating the position status.

The following example demonstrates how to modify a position's reporting structure.

Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position

- 1. In the **Position Number** field, enter the **position number** being modified.
- 2. Select Search.

C DPR Self-Service		Manage/Create Position
✓ New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search		
	11	



Lecture 1: Modify Position

The position information is displayed.

1. Select the **position** being modified.

C DPR Self-Service			М	anage/Create Posit	ion				A : .
▼ New Search	View Manage/Create	e Position							
Position Number 00006777									Chart No
Description									1
Position Status	Position Number O	Description 0	Reports To 🛇	Business Unit O	Company O	Department O	Status 🌣	Job Code ⊜	Current Head Count O
~	00006777	CLERK 3	00006762	FR	MDC	FR00000000	Active	000012	1/1
Reports To Position Number									
Company									
MDC (1)									
- Department									
C FR00000000 (1)									
Active (1)									
✓ Job Code									
000012 (1)									

2. Select the **Plus (+)** button above the **Effective Date** to modify the position with a new **effective date**.

C Search Results				Position Details					:
Position Number 00 Headcount Status Fil	006777 led								Clone
Current Head Count 1 o	of 1								
+									1 row
Effective Date 🗘	Effective Sequence \Diamond	Reason 0	Business Unit 🗘	Department \diamond	Job Code 🗘	Location \Diamond	Status 🗘	Approval Chain \Diamond	
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	0 >



Lecture 1: Modify Position

The **Request Details** pop-up is displayed to enter the new effective date and the modification reason.

Listed below are some of the common **Modification Reason Codes** users utilize when making modifications.

Reason Code	Description
FTE	Change from Temporary to Regular
INA	Position Inactivated
	(Must have an effective date and no incumbents in the position)
RTC	Reports to Change
	(Must have an effective date and incumbents in the position)
STA	Position Status Change
UPD	Position Data Update

- 3. In the ***Effective Date**, enter the **new effective date**.
- 4. In the Reason Code field, select RTC (Reports to Change) as the reason.
- 5. Select Continue.

Cancel		Request Details		
	*Effective Date	01/05/2022		
Ef	fective Sequence	0		
	Reason Code	RTC	Q	Reports To Change

The **Position Data** page (Step 1 of 5) will display, and users must go through the 5 steps of Manage a Position to complete the request.

6. In the **Work Location** section, in the **Reports To** field, enter the **position number** of the new immediate supervisor.

Work Location								
~F	Reg Region	USA	Q	United States *0	Company	MDC	Q,	Miami Dade County
~[Department	FR00000000	Q,	FIRE DEPARTMENT				
_	Location	FR00000056	۹	9300 NW 41ST ST				
	Reports To	00007345	۹	CLERK 4 View Current Incumbents				
Super	visor Level	12 (۹	- Supervisor Classes				



Lecture 1: 7. Modify Position

7. Review the requested modifications and select Next.

			Manage Position		
Position Number 00006777 Headcount Status Filled Current Head Count 1 of 1					
Position Data Visited	Step 1 of 5: Position Data				
2 Additional Information Visited	Effective Date Effective Sequence	01/05/2022		Reason Code Approval Status	RTC Reports To Change Not Available
3 Attachments Visited	Position Information *Filed Status	Approved		Max Head Count	1
4 Budget Incumbents Visited	*Status Burdneted Position	Active		Non-Mayoral	
5 Review and Submit Not Started	Senior Management	No			
	Job Information "Business Unit	FR Q	Fire Rescue	*Full/Part Time	Full-Time V
	*Job Code	000012 Q	Clerk 3	Union Code	K Q, GSAF - OPEIU Local 100
	"Regular/Temporary	Regular		Short Title	CLERK 3
	"Regular Shift	Not Applicable ~		Description	NATURE OF WORK. This is supervisory clerical work or independent
	*Title	CLERK 3			Valadad words at a second black (1990)
	Work Location		2		
	*Reg Region	USA Q	United States	"Company	MDC Q. Miami Dade County
	*Department	FR00000000 Q	DIRE DEPARTMENT		
	Reports To	00007345 0	CLERK 4 View Current Incumbents		
	Supervisor Level	12 Q	Supervisor Classes		
	Salary Plan Information				
	Salary Admin Plan	STEP Q		Grade	75 Q,
	Standard Hours	80.00		Step	٩
	Work Period	B Q	Biweekly		
	Specific Information				
	► USA				

8. Review Additional Information page (Step 2 of 5) and select Next.

× Exit			Manage Positie	on			:
Position Number 00006777 Headcount Status Filled Current Head Count 1 of 1							
						< Previous	Next >
1 Position Data Visited	Step 2 of 5: Additional Infor	mation					
	Effective Date	01/05/2022		Reason Code	RTC Reports To Change		
2 Additional Information	Effective Sequence	0		Approval Status	Not Available		
L	Education and Government						
3 Attachments Visited							
	*Pre-Encumbrance Indicator	Encumber Immediately	~	FTE	1.000000		
4 Budget Incumbents Visited	*Encumber Salary Option	Salary Step	~	Adds to FTE Actual Count	Yes		
5 Review and Submit Not Started	*Classified Indicator	Classified	~				

Attachments for this process are optional.

9. Review Attachments page (Step 3 of 5) and select Next.

× Exit		Manage Position		:
Position Number 00006777 Headcount Status Filled Current Head Count 1 of 1			< Previous	Next >
Position Data Visited Additional Information Visited	Step 3 of 5: Attachments Effective Date 0105/2022 Effective Sequence 0	Reason Code RTC Reports To Change Approval Status Not Available		
3 Attachments Visited	Attachments You have not added any Attachments.			
4 Budget Incumbents Visited	Add Attachment			
5 Not Started				



Lecture 1: Modify Position

10. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.

NOTE: When there are no incumbents in the position, it is required to have the **Update Incumbents** field set to **No** before submitting the request.

Notice in the **Current Incumbents** section, the incumbent in the current position is listed.

11. Review Budget Incumbents page (Step 4 of 5) and select Next.

X Exit				Manage Positi	on					:
Position Number 00006777 Headcount Status Filled Current Head Count 1 of 1										
									< Previous	Next >
1 Position Data Visited	Step 4 of	5: Budget I	ncumbents		Reason	Code RTC Reports To	o Change		Related Informa	tion 🚓
- Additional Information	Effe	ective Sequence	0		Approval S	itatus Not Available				
2 Visited	Current Bud	get							- Related Information	Ģ
3 Attachments		Earnings	0.000				Cdn Tax 0.000			
Visited		Deductions	0.000				Total 0.00			
Budget Incumbents		Tax	0.000						View Position	
4 Visited	Incumbents								Position History	
5 Review and Submit Not Started			Update Incumbents	Yes						
			Include Salary Plan/Grade	No						
			Force Update for Title Changes	No						
	Current Incu	mbents						1 row		
								₽ Q ↑↓		
	Name O	Empl ID 0	Empl Record O Full/Part O	Stnd Hrs/Wk O Effective Date O	Action 0	Action Reason O	Override Position Data O	Job Data 이		
	Glinda King	00198155	0 Full-Time	80.00 12/28/2020	Data Change	Conversion	N	Job Data		

- 12. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.
- 13. Select **Submit** once the requested modifications are ready for processing.

× Exit		Manage Position	:
Position Number 00006777 Headcount Status Filled Current Head Count 1 of 1			
			< Previous Submit
1 Position Data Visited	Step 5 of 5: Review and Submit		
2 Additional Information	Effective Date 01/05/2022	Reason Co	de RTC Reports To Change
Visited	Effective Sequence 0	Approval State	us Not Available
3 Attachments	Summary Of Changes		
Visited	Description	Proposed Value	Current Value
4 Budget Incumbents Visited	Reason Code	RTC	CNV
5 Review and Submit	Action Date	2022-01-10	2014-10-30
	Reports To Position Number	00007345	00006762



Lecture 1: Modify Position

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator.** Once fully approved, the Position Data as well as the employee's Job Data updates accordingly.

NOTE: Once a position is approved, the DPR receives a notification that the requested position changes have taken effect.

Position Confir	mation
✔ The Position Number 00006777 has been s	uccessfully submitted for approval.
Indify Position Approval	
✓ Reports To Change	Pending
Modify Position Approval	
📓 Pending	
Multiple Approvers HR Central Position Approver	
	Go to Position Manageme
Go to Position Details Go to Manage/Create Po	



Lecture 2: Validating the modification request affects the Position. Validating Navigate to Manage/Create Position: Human Resources (HCM) > DPR Self-Service > Modification Manage/Create Position Request

- 1. In the **Position Number** field, enter the **position number** being modified.
- 2. Select Search.

C DPR Self-Service	Manage/Create Position
✓ New Search	View Manage/Create Position
Position Number	+ Add
Description	
Position Status	
Reports To Position Number	
Search	
	11

The position information is displayed.

3. Select the **position** being validated.

C DPR Self-Service	Manage/Create Position										
	View Manage/Create Position										
Position Number 00006777	Tesuits lound.								Chart No		
Description	III III + Add								1 row		
Position Status	Position Number 🗘	Description 🗘	Reports To 🗘	Business Unit 🗘	Company 🗘	Department 🗘	Status 🗘	Job Code 🗘	Current Head Count 🗘		
~	00006777	CLERK 3	00007345	FR	MDC	FR0000000	Active	000012	1/1		
Reports To Position Number											
Search											
→ Business Unit	Ľ										
FR (1)											
✓ Company											
MDC (1)											
✓ Department											
G FR0000000 (1)											
C Active (1)											
✓ Job Code											
000012 (1)											


Lecture 2: Validating Modification Request

The **Position Details** page displays the position activities listed with the Effective Dates, Reason, and Approval Status.

Notice the recent request approved.

4. Select the Expand Icon (>) to see full details of the position.

C Search Results				Position Details						:
Position Number 00 Headcount Status Fil Current Head Count 1 o	006777 led f 1									Clone
										2 rows
Ŧ										
Effective Date O	Effective Sequence 🛇	Reason 🗘	Business Unit 🛇	Department 🗘	Job Code 이	Location 0	Status 🛇	Approval Chain 🛇		
01/05/2022	0	Reports To Change	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	0	>
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	Ø	>

The View Position page is displayed with the position details.

Notice the **Reason field**, **Approval Status field**, and **Reports To field** updates accordingly.

		View Position	1				* •	2 : .
Position Number 00033280 Headoount Status Open Current Head Count 8 of 0								
	Effective Date 10/15/2024							(Tracting of the
	Etholius Anguason ()						KK Previous	Next
	Reason NEW New Position							
	Approval Btatus In Approval Process							
Position Information								
	Position Status Approved			Max Head Count 1				
	Status Active			Status Date 12/11/2024				
	Action Date 12/13/2024							
	Key Position No			Job Sharing Permitted No				
	Budgeted Position Yes			Non-Mayoral Yes				
	Senior Management No							
Job Information								
	Business Unit PA	Office of the Proprty Appraisr		Manager Level				
	Job Code 000102	Property Appraiser Clerk 1		All Other Positions				
	Regular/Temporary Regular			Pull/Part Time Pul-Time				
	Regular Bhiff Not Applicable			Union Code H		Local 199 - General Employees		
	Title Property Appraiser Clerk 1			enort libe Pack 1				
				Description Nature of Work This is specialized clerical we	rk in preparation			
Work Location								
	Reg Region USA	United States		Company PA		Property Appraiser		
	Department PA01010000	PROPERTY APPRAISER'S OFFICE		Dot-Line				
		Stephen P. Clark Gov. Center		Security Clearance				
	Reports To 00012391	PROPERTY APPRAISER SUP 1 View Current Incumbents						
	Supervisor Lvi							
Salary Plan Information								
	Pay Plan			Orade 072				
	Salary Admin Plan H			8tep				
	Standard Hours 80.00		Mon	Tue Wed Thu Fri Bat	Bun			
	Work Period B	Biweekly						
► USA								
Specific information								
Education and Government								
Budget and incumbents Summary of Changes								
Attachments								

Lecture 2: Validating Modification Request

Once the Position Data is validated, the next step is to verify the employee's job data record. Users must ensure the employee's job data reflects the updated reporting structure, as it affects processes such as Time & Absence Management and ePerformance Management.

Navigate to Job Data: HCM > HR Administration > Job Information > Job Data

- 1. Select the Find an Existing Value tab.
- 2. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.
- 3. Select Search.

Human Resources (HCM)	
Job Information	Job Data
Job Data	Enter any information you have and click Search. Leave fields blank for a list of all values.
Workforce Job Summary	Find an Existing Value Keyword Search
Manage Employee Profile	▼ Search Criteria
🛂 Headcount 🗸 🗸	Empl ID begins with 🗸
🕹 Labor Administration 🛛 🗸 🗸	Empl Record =
👬 HR Configuration 🗸 🗸	Name begins with 🗸
	Last Name begins with 🗸
	Second Last Name begins with 🗸
	Alternate Character Name begins with 🗸
	Middle Name begins with 💙
	Case Sensitive
	Search Clear Basic Search 🖾 Save Search Criteria

Lecture 2: Validating Modification Request

The Employee's Job Data record is displayed.

4. Select the **Job Information** tab to see the reporting change.

Notice under Job Information Details the Reports To section now displays the employee's new immediate supervisor's Position Number, Employee ID, and Name.

K Human Resources (HCM)	HR Administration
Job Information	Minist Lansline Job Information Lab Labor Douvell Colory Film Componenties
Job Data	Mork rocanou ago moutanou ago Fapo. Faluon Faluon Zelan Ausu Coulteuranou
Workforce Job Summary	Glinda King Empl ID 00198155 Employee Empl Record 0
Manage Employee Profile	Job Information Details 💿 Q 🔍 🖣 Tof 1 🗸 🕨 🕨
Headcount	Stierting Date
Labor Administration	Y Effective Sequence 0 Action Position Change
HR Configuration	HR Status Active Reason Reports To Change Payroll Status Active Job Indicator Primary Job
	Current
	Job Code 000012 Clerk 3 Entry Date 12/22/2003
	Supervisor Level 12 Supervisor Classes
	Supervisor ID Reports To: 00007345 CI ERK 4: 00159740 Note Foster
	Regular/Temporary Regular Full-Part Full-Part
	Empl Class Perm Protected Class SSN Protected Only
	Regular Shift Not Applicable Shift Rate
	Classified Ind Classified Shift Factor
	Standard Hours ®
	Standard Hours 80.00 Work Period B Biweekly
	FTE 1.000000 Adds to FTE Actual Count? Encumbrance Override
	Contract Number @
	Contract Type
	P 🔲 USA
	Job Data Employment Data Earnings Distribution Benefits Program Participation Creditable Adjusted Dates
	Save Return to Search Notify Refresh Update/Display Include History
	Work Location Job Information Job Labor Payroll Salary Plan Compensation

This concludes the Validating Modification Request process.

NOTE: Top of stack record displays the information pertaining to the Employee currently seated in the Position.

Lecture 3:When inactivating a position, it is important to ensure there are no incumbents in the
position.PositionNOTE: For historical purposes, no fields in this process are to be modified except the

Update Incumbents toggle in **Budgeted Incumbents**, which is Step 4 of the process.

Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position

- 1. In the **Position Number** field, enter the **position number** being inactivated.
- 2. Select Search.

C DPR Self-Service		Manage/Create Position
▼ New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search Clear		

The position information is displayed.

3. Select the position being inactivated.

NOTE: Ensure the Current Head Count is zero when deactivating a position

C DPR Self-Service			Manage/Create P	osition					star 👬 👬
✓ New Search	View Manage/Crea 1 results found.	te Position							
Position Number 00003294									Chart No
Description		d							1 гож
Position Status	Position Number ©	Description 0	Reports To 🗘	Business Unit O	Company O	Department O	Status ့	Job Code 이	Current Head Count O
V Departs To Depition Mumber	00003294	MANAGER ITD ADMINISTRATIVE SER	00018431	IT	MDC	IT00000000	Active	001755	0/1
Reports to Position Number									
Search Clear									
Business Unit									
□ IT (1)	п								
- Company									
MDC (1)									
✓ Department									
□ IT00000000 (1)									
→ Status									
C Active (1)									
✓ Job Code									
001755 (1)									



Lecture 3: Inactivate Position 4. Select the **Plus (+)** icon above the **Effective Date** to modify the position with a new effective date.

C Search Results				Position Details						:
Position Number Headcount Status Current Head Count	00003294 Open 0 of 1									Clone
+										1 row
Effective Date O	Effective Sequence O	Reason O	Business Unit O	Department O	Job Code O	Location O	Status O	Approval Chain O		
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain	0	>

The **Request Details** pop-up is displayed to enter the new effective date and select the modification reason.

- 5. In the ***Effective Date** field, enter the **new effective date**.
- 6. In the Reason Code field, select INA (Position Inactivated) as the reason.
- 7. Select Continue.

Cancel		Request Details				
	*Effective Date	01/05/2022				
Effe	ective Sequence	0				
	Reason Code	INA	۹	Position Inactivated		

The **Position Data** page (Step 1 of 5) then displays, and users must go through the 5 steps of Manage a Position to submit the request.

8. In the **Position Information** section, in the ***Status** field, select **Inactive**.

Step 1 of 5: Position Data			
Effective Date	01/05/2022	Reason Code	INA Position Inactivated
Effective Sequence	0	Approval Status	Not Available
Position Information			
*Filed Status	Approved ~	Max Head Count	1
*Status	Inactive ~		
Budgeted Position	Yes	Non-Mayoral	No
Senior Management	No		



Lecture 3: Inactivate Position 9. Review the requested modifications and select Next.

X Exit			Manage Position		
Position Number 00003294 Headcount Status Open arrent Head Count 0 of 1					r
Position Data Visited	Step 1 of 5: Position Data				
2 Additional Information Not Started	Effective Date Effective Sequence	01/05/2022 0		Reason Code Approval Status	INA Position Inactivated Not Available
Attachments	Position Information				
Not Started	*Filed Status	Approved	-	Max Head Count	1
Budget Incumbents	*Status	Inactive	-		
Not Starled	Budgeted Position	Yes 🔵	-	Non-Mayoral	No
Review and Submit Not Starled	Senior Management	No			
	Job Information				
	*Business Unit	п	A Information Technology	*Full/Part Time	Ful-Time ¥
	*Job Code	001755 0	A Manager Itd Administrative Svc	Union Code	L Q Non Bargaining
	*Regular/Temporary	Regular	-	Short Title	MGRITDADSV
	"Regular Shift	Not Applicable	-	Description	MANAGER ITD ADMINISTRATIVE SER
	*Title	MANAGER ITD ADMINISTRATIVE SER			A
	Work Location				
	"Reg Region	USA C	A United States	"Company	MDC Q, Miami Dade County
	*Department	IT00000000 C	INFORMATION TECHNOLOGY DEPT		
	Location	ID00000705 C	3, 5680 SW 87 AVE		
	Reports To	00018431	DIV DIR ITD View Current Incumbents		
	Supervisor Level		2		
	Salary Plan Information				
	Salary Admin Plan	PAYG	2	Grade	058 Q.
	Standard Hours	80.00		Step	٩
	Work Period	в	A Btweekty		
	Specific Information				
	+ USA				

10. Review Additional Information page (Step 2 of 5) and select Next.

Position Number 00003294 Headcount Status Open Current Head Count 0 of 1					< Previous	Next >
1 Position Data Visited	Step 2 of 5: Additional Information		Durana dada	INIA Dealling localizated		
2 Additional Information Visited	Effective Sequence 0 Education and Government		Approval Status	Not Available		
3 Attachments Not Starled	*Pre-Encumbrance Indicator Encumber I	mmediately.	नान	1.000000		
4 Budget Incumbents Not Started	"Encumber Salary Option Salary Step	×	Adds to FTE Actual Count	Yes		
5 Review and Submit Not Started	*Classified Indicator Classified	~				

Attachments for this process are required.

11. On the **Attachments** page (Step 3 of 5) attach any supporting documentation regarding the request.

12. Select Attachment.

× Exit	Mai	age Position
Position Number 00003294 Headcount Status Open Current Head Count 0 of 1		C Previous Next
Position Data Visited Additional Information Visited	Step 3 of 5: Attachments Effective Date 01/06/2022 Effective Sequence 0	Reason Code INA Position Inactivated Approval Status Not Available
3 Attachments Visited	Attachments You have not added any Attachments.	
4 Budget Incumbents Not Started	Add Attachment	
5 Review and Submit Not Started		



Lecture 3: Inactive

Position

- 13. Select My Device.
- 14. Select the **file being attached**.
- 15. Select Upload.
- 16. Select Done.
- 17. In the **Description** field, enter a **brief description** of supporting documentation.
- 18. Select Next.

	Exit		Manage Position			:
F He Curr	osition Number 00003294 adcount Status Open ent Head Count 0 of 1					
					< Previous	Next >
1	Position Data Visited	Step 3 of 5: Attachments		Bassan Cada INA Position Instituted		
2	Additional Information Visited	Effective Sequence 0		Approval Status Not Available		
3	Attachments Visited	Attachments Add Attachment				
4	Budget Incumbents Not Started	Attachments \Diamond	Description 🗘	Attached By \Diamond Attached \Diamond	Status 🗘	1 row
6	Review and Submit	Deactivate_Position_00003294_(1-5-22).docx	Memo to Deactivate Position (1-5-22)	Xavier Washington 01/05/22 03:53:20 PM	1 Active	Û
5	Not Started					

- 19. In the **Budget Incumbents** page (Step 4 of 5) in **Update Incumbents** field select **No**.
- 20. Select Next.

× Exit		Manage Position	:
Position Number 00003294 Headcount Status Open Current Head Count 0 of 1			< Previous Next >
1 Position Data Visited	Step 4 of 5: Budget Incumbents Effective Date 01/05/2022	Reason Code INV. Position Inscivulad	
2 Additional Information Visited	Effective Sequence 0 Current Budget	Approval Status Not Available	
3 Attachments Visited	Earnings 0.000 Deductions 0.000	Cdn Tax 0.000 Total 0.00	
Budget Incumbents Visited	Tax 0.000		
δ Review and Submit Not Starled	-	Update Incumbents D No	
	Force	Update for Title Changes No	
	Current Incumbents		
	No incumbents to display.		9



Lecture 3: Inactivate Position

- 21. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.
- 22. Select **Submit** once the requested modifications are ready for processing.

× Exit	Manage	Position	:		
Position Number 00003294 Headcount Status Open Current Head Count 0 of 1			< Previous Submit		
1 Position Data Visited	Step 5 of 5: Review and Submit				
2 Additional Information Visited	Effective Date 01/05/2022 Effective Sequence 0	Reason Code INA Position Inactivated Approval Status Not Available			
3 Attachments	Summary Of Changes				
V Vianeu	Description	Proposed Value	Current Value		
4 Budget Incumbents Visited	Status as of Effective Date	I.	А		
6 Review and Submit	Reason Code	INA	CNV		
Visited	Action Date	2022-01-10	2019-08-16		
	Update Incumbents	N	Y		

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**. Once fully approved, the Position Data is updated accordingly.

00003294 has been success	fully submitted for approval.
	Pending
	Pending
	Pending
	Pending
	-
o to Manage/Create Position	Go to Position Managemen
	o to Manage/Create Position

This concludes the Inactive Position process.



Lecture 4:Validating the modification request affects the Position.ValidatingNavigate to Manage Position: Human Resources (HCM) > DPR Self-Service > ManageInactivePositionPosition1 - In the Position Number field, enter the position number being inactivated

- 1. In the **Position Number** field, enter the **position number** being inactivated.
- 2. Select Search.

C DPR Self-Service	Manage/Create Po	sition
✓ New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search	_	
	1	

The position information is displayed.

3. Select the **position** being validated.

< DPR Self-Service			Manage/Create	Position					👬 :	MDHJ
✓ New Search	View Manage/Create	Position								
Position Number 00003294	1 results found.								Chart No	
Description	□ III + Add									1 row
Position Status	Position Number 🗘	Description 0	Reports To 🗘	Business Unit 0	Company O	Department 0	Status 0	Job Code 🗘	Current Head Count O	
~	00003294	MANAGER ITD ADMINISTRATIVE SER	00018431	IT	MDC	IT0000000	Inactive	001755	0/1	
Reports To Position Number										
Search										
← Business Unit										
IT (1)										
- Company										
MDC (1)										
- Department										
□ IT00000000 (1)										
✓ Status										
Inactive (1)										
✓ Job Code										
001755 (1)										



Lecture 4:The Position Details page displays the position activities listed with the Effective Dates,ValidatingReason, and Status.InactiveNotice the recent request approved.PositionPosition

4. Select the Expand Icon (>) to see full details of the position.

C Search Results				Position Details					
Position Number (Headcount Status (Current Head Count (00003294 Open 0 of 1								Clone
+									2 rov
Effective Date 0	Effective Sequence 0	Reason 0	Business Unit 0	Department 0	Job Code 🌣	Location O	Status O	Approval Chain 0	
01/05/2022	0	Position Inactivated	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain	0 >
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain	/

The **View Position** page is displayed with the position details.

View Position

Notice the **Reason** field and the **Approval Status** field updates accordingly.

			View Position			🕋 🐶 : 🖩
Position Number 00003294						
Current Head Count 0 of 1						
	Effective Date 01/05/2022					CC Previous Next N
	Effective Sequence 0					HEAT
	Reason INA Position Inactivated					
	Approval Status Approved					
Position Information						
	Position Status Approved		Max Head Count 1			
	Status Inactive		Status Date 03	/20/2019		
	Action Date 01/05/2022					
	Key Position No		Job Sharing Permitted No)		
	Budgeted Position Yes		Non-Mayoral No			
	Senior Management No					
Job Information						
	Business Unit IT	Information Technology	Manager Level			
	Job Code 001755	Manager IId Administrative Svc	All	Uther Positions		
	Regular/Temporary Regular		runpart time ru	ii-time		
	Regular Shift Not Applicable		Union Code E	201701001/	Non Bargaining	
	Title MANAGER ITD ADMINISTRATIVE SER		Short Tibe W	SKITUADSV		
			Description	IANAGER ITD ADMINISTRATIVE SER	/	
Work Location						
Work Location	Das Danias 1165	Linited Otates	Company III		Marri Dada Countu	
	Department (T0100000	INFORMATION TECHNOLOGY DEPT	Dot Line		man baar orang	
	Location ID0000705	5680 SW 87 AVE	Security Clearance			
	Reports To 00018431	DIV DIR ITD View Current Incumbents	,			
	Supervisor v					
Salary Dian Information						
Salary Plan Information	Dev. Direc		Carda Al			
	Fay Field		Gibbe 05	•		
	Standard Hours 20.00		Mon Tue Wed Thu	Fri Sat Sun		
	Work Daried B	Biosaddy				
N 1164						
Specific Information						
Education and Government						
Budget and Incumbents						
Summary of Changes						
 Attachments 						

The position is successfully **Inactivated**, concluding the Validating Inactive Position process.

•



Lesson 3: Submitting Position Change

Lesson

Now that you have completed the lesson, you should be able to:

- Summary
- Validate the Modification Request
- Inactivate a position

Modify a position

• Validate the Inactive Request



Lesson 4: At the conclusion of this lesson, you will be able to:

Overview

• Update a temporary employee to regular status for them to obtain benefits

Lesson 4: Introduction



Lesson 4: Submit Job Data Changes that Impact Benefits



Key Terms

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The following key terms are used in this module:

Term	Definition
N/A	N/A

Lecture 1:



Lesson 4: Submit Job Data Changes that Impact Benefits

This lesson will review Submit Job Data Changes that Impact Benefits:

Submit Job Data • Update a temporary employee to regular status for them to obtain benefits Changes that Impact Benefits



Lecture 1: Submit Job Data Changes that Impact Benefits This lesson reviews how to submit job data changes that impact benefits. To make a position benefit eligible for a part-time/temporary employee, the initial process begins with modifying the position.

Modifications include:

- Modifying FTE
- Modifying the standard hours
- Changing it from temporary to regular

Once this process is complete, the position is then benefit eligible. Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position

- 1. In the **Position Number** field, enter **the part-time/temporary position number** being modified.
- 2. Select Search.

C DPR Self-Service		Manage/Create Position
✓ New Search	View Manage/Create Position	
Position Number	+ Add	
Description		
Position Status		
Reports To Position Number		
Search		
	11	



Lecture 1: Submit Job Data Changes that Impact Benefits The position information is displayed.

3. Select the **position being modified**.

< DPR Self-Service			Manage	e/Create Position					r 🕆
New Search	View Manage/Crea	ate Position							
osition Number 20021632									Chart
Description	■ = + A4	id							
osition Status	Position Number 🌣	Description O	Reports To O	Business Unit ○	Company O	Department O	Status 🌣	Job Code ິ	Current Head Count O
~	00021632	RECREATION LEADER	00010839	PR	MDC	PR00000000	Active	007301	1/1
Search Clear Business Unit PR (1) Company MDC (1)	-								
Department									
PR00000000 (1)									
Status									
Active (1)									
Job Code									
007301 (1)									

4. Select the **Plus Sign (+)** above the **Effective Date** to **modify the position with a new effective date**.

C Search Results				Position Details					:
Position Number Headcount Status	00021632 Filled								Clone
Current Head Count	1 of 1								
+									1 rov
Effective Date 🗘	Effective Sequence \Diamond	Reason 🗇	Business Unit 🗘	Department 0	Job Code 🗘	Location \Diamond	Status 0	Approval Chain \Diamond	
01/01/1901	0	Position Data Conversion	Parks, Recreation & Open Spcs	PARKS, REC & OPEN SPACES	Recreation Leader	Hickman Building - PR	Approved	Approval Chain	



Lecture 1: Th Submit Job Data (Cl Changes that 5. Impact Benefits 6

The **Request Details** pop-up is displayed to enter the new effective date and the **FTE** (Change from Temp to Reg) modification reason.

5. In the ***Effective Date**, enter the **new effective date**.

- 6. In the Reason Code field, select FTE (Change from Temp to Reg) as the reason.
- 7. Select Continue.

Cancel		Request Details	C	Continue	
	*Effective Date	01/24/2022			
Ef	fective Sequence	0			
	Reason Code	FTE	Q	Change from Temp to Reg	

The **Position Data** page (Step 1 of 5) is displayed, and users must go through the 5 steps of Manage a Position to complete the request.

- 8. In the **Job Information** section, in the ***Regular/Temporary** field, **select Regular** from the drop down.
- 9. In the ***Full/Part Time** field, select **Full-Time**.

Job	Information					
	*Business Unit	PR Q	Parks, Recreation & Open Spcs	*Full/Part Time	Full-Time 🗸	
	*Job Code	007301 Q	Recreation Leader	Union Code	H Q	Local199 - General Employees
	*Regular/Temporary	Regular 🗸		Short Title	RECLEADER	
	*Regular Shift	Not Applicable		Description	NATURE OF WORK: This is specialized recreation work in	s 🗘
	*Title	RECREATION LEADER			La constata a constana de constituir e con	indiate of



10. Review the requested modifications and select Next.

Lecture 1: Submit Job Data Changes that Impact Benefits

× Exit			Manage Position					
Position Number 00021632 Headcount Status Filled Current Head Count 1 of 1								Next >
Position Data Visited	Step 1 of 5: Position Data						Related Information	n
	Effective Date	01/24/2022		Reason Code	FTE Change from Temp to Reg			0
2 Visited	Effective Sequence	0		Approval Status	Not Available		-Related Information	.0
a Attachments	Position Information							
Not Started	*Filed Status	Approved 🗸		Max Head Count	1			
4 Budget Incumbents	"Status	Active 🗸		Status Date	07/13/2020		View Position	
Not Started	Action Date	01/25/2022					Position History	
5 Review and Submit Not Started	Key Position	No		Job Sharing Permitted	No			
	Budgeted Position	No		Non-Mayoral	No			
	Senior Management	No						
	Job Information							
	*Business Unit	PR Q	Parks, Recreation & Open Spcs	*Full/Part Time	Full-Time 👻			
	*Job Code	007301 Q,	Recreation Leader	Union Code	H Q	Local199 - General Employees		
	*Regular/Temporary	Regular 🗸		Short Title	RECLEADER			
	"Regular Shift	Not Applicable		Description	NATURE OF WORK: This is	*		
	"Title	RECREATION LEADER			specialized recreation work in planning.	li.		
	Work Location							
	*Reg Region	USA Q	United States	*Company	MDC Q Miami D	ade County		
	*Department	PR0000000 Q	PARKS, REC & OPEN SPACES	Dot-Line	٩			
	Location	D5D3030000 Q	Hickman Building - PR	Security Clearance	٩			
	Reports To	00010839 Q	RECREATION THERAPIST 2 View Current Incumbents					
	Supervisor Level	٩						
	Salary Plan Information							
	Salary Admin Plan	H Q		Grade	037 Q,			
	Standard Hours	59.00		Step	٩			
	Work Period	B Q	Biveekly					
	Specific Information							

- In the Additional Information page (Step 2 of 5), in the FTE field, enter 1.00.
 NOTE: When changing a Part-Time position to Full-time it is necessary to adjust the FTE to 1.
- 12. Select Next.

× Exit		Manage Position	:
Position Number 00021632 Headcount Status Filled Current Head Count 1 of 1			
			< Previous Next >
1 Position Data	Step 2 of 5: Additional Information		Related Information
Visited	Effective Date 01/24/2022	Reason Code FTE Change from Temp to Reg	0
2 Additional Information	Effective Sequence 0	Approval Status Not Available	
V Visited	Education and Government		
3 Attachments Not Started	Position Pool ID	Q	
~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	"Pre-Encumbrance Indicator Encumber Immediately	FTE 1.000000	
4 Budget Incumbents Not Started	Allow States Colory Onting States	Adds to FTE Actual Count	View Position
-	Encumber salary option Salary Step		Position History
5 Review and Submit Not Started	Encumber Salary Amount 0.000		
	*Classified Indicator Temporary	•	

Attachments for this process are optional.

13. Review Attachments page (Step 3 of 5) and select Next.

× Exit		Manage Position	1
Position Number 00021632 Headcount Status Filled Current Head Count 1 of 1			< Previous Next >
1 Position Data	Step 3 of 5: Attachments		Related Information
Visited	Effective Date 01/24/2022	Reason Code FTE Change from Temp to Reg	•
2 Additional Information	Effective Sequence 0	Approval Status Not Available	
3 Attachments Visited	Attachments You have not added any Attachments.		← Related Information 占니
4 Budget Incumbents Not Started	Add Attachment		View Position Position History
5 Review and Submit Not Started			



Lecture 1: Submit Job Data Changes that **Impact Benefits**

14. Ensure the Update Incumbents toggle is set to Yes since this position has incumbents.

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

Notice in the **Current Incumbents** section, the incumbent in the current position is listed as well as their current information.

Manage Positio osition Number 00021632 adcount Status Filled ent Head Count 1 of 1 < Previous Next > 1 Position Data Step 4 of 5: Budget Incumbents Related Information Reason Code FTE Change from Temp to Reg Effective Date 01/24/2022 2 Additional Information Effective Sequence 0 Approval Status Not Availab rent Budget Earnings 0.000 Cdn Tax 0.000 3 Attachments Deductions 0.000 Total 0.00 Tax 0.000 4 Budget Incumbents Visited Position History ncumbents 5 Review and Submit Not Started Update Incumbents Yes Include Salary Plan/Grade 🕖 No Force Update for Title Changes No Current Incumbents R, Q ↑↓ Name 🗘 🛛 Empl ID 🗘 Empl Record 🗘 Full/Part 🗘 Stnd Hrs/Wk 🗘 Effective Date 🗘 Action 🛇 Action Reason 🗘 Override Position Data 🛇 Job Data 이 risty Hobbs 00312190 0 Part-Time 59.00 12/28/2020 Data Change Conversion Ν Job Data

15. Review Budget Incumbents page (Step 4 of 5) and select Next.

- 16. In the Summary of Changes section of the Review and Submit page (Step 5 of 5), ensure the requested modifications are listed correctly.
- 17. Select Submit once the requested modifications are ready for processing.

× Exit		Manage Position		:
Position Number 00021632 Headcount Status Filled Current Head Count 1 of 1				< Previous Submit
Position Data Visited Additional Information Visited	Step 5 of 5: Review and Submit Effective Date 01/24/2022 Effective Sequence 0		Reason Code FTE Change from Temp to Reg Approval Status Not Available	Related information
3 Attachments Visited	Summary Of Changes	Provide and Males	Queenest Materia	
4 Budget Incumbents Visited	Reason Code	FTE	CNV	View Position Position History
5 Review and Submit Visited	Action Date Regular/Temporary	2022-01-25 R	2020-07-28 T	
	Full/Part Time	F	P	
	FTE	1	0	



Lecture 1: Submit Job Data Changes that Impact Benefits

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator.** Once fully approved, the Position Data and the employee's Job Data updates accordingly.

V The Position I	Number 00021632 has been successfully	submitted for approval.		
odify Position Approval				
Change from Temp to Reg		Pending		
Modify Position Approval				
🚡 Pending				
Multiple Approvers HR Central Position Approver		>		
	Go to Manage/Create Position	Go to Position Management		
Go to Position Details				

Lecture 1: Submit Job Data Changes that Impact Benefits

Once the position modification is approved and validated, the next step is to validate the employee's job data record. Users need to ensure the employee's job data reflects the position modifications such as the Regular/Temporary, Full/Part Hours, Standard Hours, and FTE status as this affects the employee's benefits.

Navigate to Job Data: HCM > HR Administration > Job Information > Job Data

- 1. Select the Find an Existing Value tab.
- 2. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.
- 3. Select Search.

C Human Resources (HCM)		
指 Job Information	^	Job Data
Job Data		Enter any information you have and click Search. Leave fields blank for a list of all values.
Workforce Job Summary		Find an Existing Value Keyword Search
Manage Employee Profile		▼ Search Criteria
Neadcount	~	Empl ID begins with 🗸
🕹 Labor Administration	~	Empl Record 📼 🗸
👬 HR Configuration	~	Name begins with 🗸
		Last Name begins with 🗸
		Second Last Name begins with 🗸
		Alternate Character Name begins with 🗸
		Middle Name begins with 🗸
		Case Sensitive
		Search Clear Basic Search 🖉 Save Search Criteria

The Employee's Job Data record then displays.



Lecture 1: Submit Job Data Changes that Impact Benefits

4. Select the **Job Information** tab to see the reporting change.

Notice under Job Information Details the Regular/Temporary section now displays the employee's new Regular status, Full-Time, Standard Hours, and new FTE. The employee is now eligible to receive benefits.

K Human Resources (HCM)	HR Administration
Sob Information	Work Location Job Information Job Labor Payroll Salary Plan Compensation
Job Data	Kristy Hobbs Empl ID 00312190
Workforce Job Summary	Employee Empl Record 0
Manage Employee Profile	Job Information Details 🗇 Q H H I I of 2 🗸 🕨 🕨
Neadcount	Go To Row Go To Row
🕹 Labor Administration	Effective Sequence 1 Action Position Change
	HR Status Active Reason Change from Temp to Reg
R Configuration	Payroll Status Active
	Job Code 007301 Recreation Leader
	Entry Date 05/26/2020
	Supervisor Level 13 Non-Supervisory
	Reports To 00010839 RECREATION THERAPIST 2 00310945 Isadora Garica
	Regular/Temporary Regular Full/Part Full-Time
	Empl Class Seasonal Protected Class SSN Protected Only
	Regular Shift Not Applicable
	Classified Ind Classified
	Standard Hours ①
	Standard Hours 80.00 Work Period B Biweekly
	FTE 1.00000 Grades to FTE Actual Count? Encumbrance Override
	Contract Number (2)
	Contract Type
	P 🧮 USA
	Job Data Employment Data Earnings Distribution Benefits Program Participation Creditable Adjusted Dates
	Save Patrm to Search Notify Defreeh
	update/Display Include History
	Work Location Job Information Job Labor Payroll Salary Plan Compensation



To change the EMPL class, a new row must be added.

- Submit Job Data 5. Select the Work Location tab.
- Changes that Impact Benefits

Lecture 1:

- 6. Select the **plus sign (+)** to add a new row.
- 7. Enter the **effective date** and select the appropriate **Action** and **Reason** from the dropdown menu.
- 8. Select Save.

K Human Resources (HCM)			HR A	dminist	ration		
a Job Information	Work Location	on Job Labor !	Payroll Salary Plan	Compens	sation		
Job Data	Kristy Mobbs		Empl ID 003	312190			
Workforce Job Summary	Employee		Empl Record 0				
Manage Employee Profile	Work Location Details ③				۹	1 II I 1 of 2 🗸	▶ ▶
Headcount ~	"Effective Date 0	1/24/2022				Go To Row	+ -
Labor Administration V	Effective Sequence	1		*Action	Position Change	~	_
HR Configuration	HR Status	Active		Reason	Change from Temp to Reg	~	
	Payroll Status	Active			Change from Temp to Reg		
	Position Number 0	0021632	RECREATION LEADER		Job Re-Classification - Prom	ot	
	Position Entry Date	5/26/2020 Position Management	Record		Job Re-Classification - Title New Position	-	
	Regulatory Region U	JSA	United States		Position Data Conversion Position Data Update		
	Company M	DC	Miami Dade County		Position Inactivated		
	Business Unit	PR	Parks, Recreation & Ope	en Spcs	Re-Organization/Restructure	,	
	Department F	PR0000000	PARKS, REC & OPEN S	PACES	Reports To Change		
	Department Entry Date (05/26/2020			Transfer		
	Location [05D3030000	Hickman Building - PR				
	Establishment ID	nDC	Miami Dade County		Date Created 0	1/27/2022	
	Last Start Date	05/26/2020					
	Expected Job End Date						
	Job Data Employme	ent Data	Earnings Distribution	Be	enefits Program Participation	Creditable Adjuste	ed Dates
	Save Deturn to Search	Notify Defrech	1			Undate/Dicplay	de History

9. Navigate back to the **Job Information** tab.

10. Select the appropriate **EMPL Class** from the dropdown menu.

Work Location	Job Information	۱ Job <u>L</u> abor	Payroll	Salary Plan	<u>C</u> ompensation		
Kristy Hobbs Employee				Empl ID 0 Empl Record 0	0312190		
Job Informati	on Details ⑦					Q I	1 of 4 V
	Effective Date	01/24/2022					Go To Row
	Effective Sequence	3			Actio	n Position Change	
	HR Status	Active			Reaso	n Change from Temp to Reg	
	Payroll Status	Leave With Pay					m
							Current
	Job Code	007301		Recreation Lea	ader		
	Entry Date	05/26/2020					
	Supervisor Level	13		Non-Superviso	iry		
	Reports To	00010839		RECREATION	THERAPIST 2 003	10945 Isadora Garica	
	Regular/Temporary	Regular			Full/Part Full-Time		
	Empl Class	Perm		Protect	ed Class SSN Pro	tected Only	
	Regular Shift	Not Applicable					
	Classified Ind	Classified					
Standard Ho	ours 🕐						



Lesson Summary

- Now that you have completed the lesson, you should be able to:
 - Update a temporary employee to regular status for them to obtain benefits





	Lesson 5: Submitting HR Transaction
Lesson 5:	At the conclusion of this lesson, you will be able to:
Overview	Successfully transfer employees to another Position Number.
	• Verify the transfer within the Job Data.

Lesson 5: Submitting HR Transactions BUSINESS PROCESS Introduction Once saved, transfer will be successful and reflective on employee's Job Data record Transfer employee to a different Position Number DEPARTMENT PERSONNEL **REPRESENTATIVE (DPR)** The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Lesson 5: Submitting HR Transaction



Key Terms

D

The following key terms are used in this module:

Term	Definition			
N/A	N/A			



Lesson 5:This lesson will review Submitting HR Transaction:Submitting HRTransfer employee to a lateral position.Transaction



Lecture 1:Transfer Employee to a different Position Number (Lateral) allows a user to transfer an
employee within the same Department and Job Code to a different Position within the
Business Unit (exclusively).Position
(Lateral)NOTE: This action is best used when transferring an employee from one branch
location to another or to different time shifts.
Navigate to Employee Position Lateral XFER: Human Resources (HCM) > DPR Self-

Service > Employee Position Lateral XFER: Human Resources (HCM) > DPR S

On the Position Lateral Transfer page under Find an Existing Value:

- 1. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.
- 2. In the Business Unit field, enter the Business Unit.
- 3. In the First Name field, enter the employee's first name.
- 4. In the Last Name field, enter the employee's last name.
- 5. Select Search.

PR Self-Service
Position Lateral Transfer Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value
Search Criteria
Empl ID begins with Business Unit begins with First Name begins with Last Name begins with
 Include History Correct History Search Clear Basic Search Save Search Criteria



Lecture 1: Transfer Employee to a Position (Lateral) The employee's current information will be displayed.

PR Self-Service
Mdc Empl Posn
Empl ID 00026999
Name Mayra Beltran
Business Unit HR Human Resources
Department HR01020000 RECRUITMENT
Position Number 00003260 HR PERSONNEL SERVICES SPEC
Latest Effective Date 12/28/2020
Employee Position Data Find First (3) 1 of 1 (2) Last
Effective Date 11/16/2021 Seq 0
Action XFR Transfer
🗟 Save 🕅 Return to Search 👘 Previous in List 🖉 Next in List 💽 Notify 🐊 Update/Display 🖉 Include History 🎲 Correct History

- 6. In the **Effective Date** field, enter the **Effective Date** of the Transfer.
- 7. In the ***Position Number** field, enter the ***Position Number** the employee is to be transferred to.
- 8. Select Save.

Notice the employee transferred from **Position #00003260 to Position #00003262.**

<pre></pre>				
Mdc Empl Posn				
Empl ID 00026999				
Name Mayra Beltran Business Unit HR Human Resources				
Department HR01020000 RECRUITMENT Position Number 00003262 HR PERSONNEL SERVICES SPEC				
Latest Effective Date 11/16/2021				
Employee Position Data Find First 1-2 of 2 Last Effective Date 11/16/2021 iii) Seq 1				
Action XFR Transfer *Position Number				
Effective Date 11/16/2021 Seq 0				
Position Number 00003262 HR PERSONNEL SERVICES SPEC				

2. Select Search.



Lesson 5: Submitting HR Transaction

Navigate to Job Data: HCM > HR Administration > Job Information > Job Data.

1. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.

Verifying the Employee's Transfer (Lateral).

Lecture 2: Verify Employee Transfer (Lateral)

指 Job Information	^	Job Data
Job Data		Enter any information you have and click Search. Leave fields blank for a list of all values.
Workforce Job Summary		Find an Existing Value
Manage Employee Profile		▼ Search Criteria
🕵 Headcount	~	Empl ID begins with 🗸
🕹 Labor Administration	~	Empl Record =
👬 HR Configuration	~	Name begins with V
		Last Name begins with 🗸
		Second Last Name begins with 🗸
		Alternate Character Name begins with 🗸
		Middle Name begins with 🗸
		Case Sensitive
		Search Clear Basic Search 🖾 Save Search Criteria

If transfer is successful, the employee's recent record should display **(Record 1 of 4)** with an updated Transfer effective.

				HR	Administra	ition
Work Location Job Informa	tion Job <u>L</u> abor	Payroll Salary Plan	<u>C</u> ompensation			
<u>Mayra Beltran</u> Employee		Empl ID 0002 Empl Record 0	26999			
Work Location Details ③				Q I		of 4 🗸 🕨 🕨
Effective Date	11/16/2021				Go	To Row
Effective Sequence	0		Action T	ransfer		
HR Status	Active		Reason			
Payroll Status	Active				Current	-
Position Number	00003262	HR PERSONNEL SER	VICES SPEC			
Position Entry Date	11/16/2021 Position Management	nt Record				
Regulatory Region	USA	United States				
Company	MDC	Miami Dade County				
Business Unit	HR	Human Resources				
Department	HR01020000	RECRUITMENT				
Department Entry Date	10/28/1996					
Location	ID00000140	111 NW 1ST ST				
Establishment ID	MDC	Miami Dade County		Date Created	11/16/202	
Last Start Date	10/28/1996					
Expected Job End Date						
·						
Job Data Employm	ent Data	Earnings Distribution	Benefits P	rogram Participation	Credital	ble Adjusted Dates
Save Return to Search Work Location Job Information J	Notify Refresh	lary Plan Compensation				

Lesson Summary

- Now that you have completed the lesson, you should be able to:
- Successfully transfer employees to another Position Number.



• Verify the transfer within the Job Data.





	Lesson 6: Submitting HR Salary Changes
Lesson 6:	At the conclusion of this lesson, you will be able to:
Overview	Request Merit Increase for Salary Grade Employee
	Request Merit Increase for Salary Step Employee

- Request Component of Pay
- Request License/Certification



Lesson 6: Submitting HR Salary Changes

The Department Personnel Representative (DPR) is responsible for requesting Salary Changes such as merit increases once evaluations have been fully reviewed and approved. The HR Central Administrator Specialist reviews, then approves or denies the Salary Change request. Once approved, the employee's job data is updated.

Lesson 6: Submitting HR Salary Changes



Once an employee has received an accredited License or Certification related to their classification, they can add the information via Employee Profile. The Department Personnel Representative (DPR) then reviews and approves this request. Once fully approved, the DPR is responsible for requesting Salary Changes for License/Certifications. The HR Central Administrator Specialist reviews, then approves or denies the Salary Change request. Once approved, the employee's job data is updated.

Lesson 6: Introduction


Key Terms



The following key terms are used in this module:

Term	Definition
Components of Pay	Additional elements of pay added to the employee's compensation. Components can be added or removed based on operational need.

Lecture 1: MeritSubmitting Merit Increase for a Salary Grade employee.Increase (Salary
Grade)Navigate to DPR Salary Change: Human Resources (HCM) > DPR Self-Service > DPR
Salary Change

- 1. Select Search Options to search for an Employee.
- 2. In the Search your Employees field, enter either the Employee's Name or Employee ID #.
- 3. Select Search.

C DPR Self-Service			
 Search Options 			
	Search your Employees	Enter Name, Employee ID, Title or Email	Search

4. Select the Employee's Record.

C DPR S	Self-Service			DPR Salary Change	
- Searc	h Options				
		Search your Employees 0021	8029	Search	
Felica K	rebs				
Select E	mployee				1 row
_					11
	Name / Title / ID - Record		Status / Type	Department	
2	Millie Gaskill Administrative Secretary 00218029 - 0		Active Employee	CSBG CENTERS - CH03010200	>

- 5. Under the **Compensation Details** section, in the ***Transaction Date field** enter the **effective date of the merit request.**
- 6. In the *Reason field select Merit.
- 7. In the Change Percent field enter the merit increase in decimal form.
- 8. Tab to see the New Information Biweekly Salary update accordingly.

× Exit				DI	PR Salary Cha	nge					2	÷
Millie Gaskill Administrative Secretary	,			1 MD Compensation	Detail		2 MD Review & Submit				Next	• >
Compensation Deta	ills *Transaction Date *Reason	03/10/2022 Merit	iii V									
Pay Component			Change Percent	Change Amount	New Amount	Current An	nount Curr	ency Code	Туре	Frequency		
MDC Biweekly			5.000	80.51	1,690.78	1,610.27	USD		Flat Amount	Biweekly		
Premium Pay					70.00	70.00	USD		Flat Amount	Biweekly		
				46,780.36 Compa-Ratio:1.16	1					1		1
		33,119.5 Minimur	8 m	38 M	1,346.32 ideoint		1	61,444.24 Maximum		1		
		New Informatio	n		Current	Information						
	Biweekly Salary	1,760.78 U	SD		1,6	80.27 USD						
	Annual Rate	45,780.36 U	SD		43,6	87.01 USD						
Changes Made Required Field							-					



Lecture 1: Merit Increase (Salary Grade) 9. Scroll down and select Default Pay Components to refresh the MDC Biweekly rate.

Notice within the **Pay Components** Section, the **MDBKLY** rate adjusts accordingly. This is the employee's new biweekly rate.

10. Select Calculate Compensation.

11. Select Next.

V Eve				DPR Salar	Change				
Millie Gaskill Administrative Secretary				MD Compensation Detail	y citange	2 MD Review & Submit			Neo
Compensation Details									
	*Transaction Date	03/10/2022 💼 Ment 🗸							
Pay Component			Change Percent	Change Amount New Amo	int Curren	:Amount C	Currency Code	Туре	Frequency
MDC Biweekly		1	5.000	80.51 1,690.78	1,610.2	7 (JSD	Flat Amount	Biweekly
Premium Pay				70.00	70.00		JSD	Flat Amount	Biweekly
				45,750.56 Compa-Rabe:1.16					
		53,119.50 Minimum		59,548.52 Midpoint			91,646.24 Maximum		
		New Information			Current Information				
	Biweekly Salary	1,760.78 USD			1,680.27 USD				
	Annual Rate	45,780.36 USD			43,687.01 USD				
Changes Made Required Field									
Salary Plan	Salary Arimin Dian	<i>.</i>	GSAF - OPFILL cost	100					
	Salary Grade	101	0000 - 01 200 2000	401					
	Grade Entry Date	12/28/2807							
	Step	9							
	Step Entry Date								
Default Pay Components									
Pay Components				2 rows					
				P ₄ Q					
Amounts Controls C	hanges Conversion	Show All	Frequency Decout	Rate Code Group					
		a 1890 78TUSD	R Percent	And Code Group					
	~	 		+ -					
2 PRMPAY C	ų	v 70.000USD	в	+ -					
Calculate Compensation									

Review the adjustments accordingly. Notice the **Transaction Date, Reason**, and the **New Information Biweekly Salary** versus the **Current Information Biweekly Salary**.

12. In the **Comments** section enter the action requested or details.

(Optional) Select Add Attachment to add any supporting documents.

13. Select **Submit** once ready for processing.

× Exit		DPR Salary Change	🧐 :
Millie Gaskill Administrative Secretary		1 Compensation Detail MD Review & Submit	C Previous Submit
Review and Submit	Transaction Date 03/10/2022 Reason Merit		
Grannach	New Information Biweekly Salary 1,760.78 USD Annual Rate 45,760.36 USD	Current Information 1,680.27 USD 43,687.01 USD	
Requesting 5% Merit Inc	ease effective 3/10/2022		
No documents have been Add Attachment Changes Made * Regured Field	attached.		



Lecture 1: Merit Increase (Salary Grade)

NOTE: If the merit increase is more than 5% the user receives the following message. When requesting more than 5% merit increase, authorized documentation must be attached to the salary request before selecting the Submit button.

outary morodoor toquoor
Your Salary Increase Request is more than 5%. roved MEMO/supporting documentation from Mayoral's Office, otherwise your request will not proceed forward.
ОК

The DPR Salary Change confirmation is displayed pending the approval of Central HR.

← HOME	DPR Salary Change
	\checkmark Your transaction request for Millie Gaskill has been successfully submitted for approval.
Millie Gaskill Administrative Secretary	
Submit Confirmation	
DPR Salary Change Approval	
DPR Salary Change Approval	
Pending	
Central HR approver	
✓ Comments	
Felica Krebs at 02/10/22 - 11:27 AM Requesting 5% Merit Increase effective 3/10/2022	



Lecture 1: Merit Increase (Salary Grade)

Once Central HR has approved the merit increase request, users can verify the merit increase via the employee's Job Data.

Navigate to Job Data: Human Resources (HCM) > HR Administration > Job Information > Job Data

- 1. Select the Find an Existing Value tab.
- 2. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.
- 3. Select Search.

C Human Resources (HCM)			HR Administration
Lob Information	^	Job Data	
Job Data		Enter any information you have and click Search. Le	ave fields blank for a list of all values.
Workforce Job Summary		Find an Existing Value	
Manage Employee Profile		▼ Search Criteria	
Neadcount	~	Empl ID begins with 🗸	
🕹 Labor Administration	~	Empl Record = 🗸	
AR Configuration	~	Name begins with v	
		Last Name begins with 🗸	
		Second Last Name begins with 🗸	
		Alternate Character Name begins with 🗸	
		Middle Name begins with 🗸	
		□ Include History □ Case Sensitive	
		Search Clear Basic Search 🖾 Save	Search Criteria



Lecture 1: Merit Increase (Salary Grade)

The employee's job data record is displayed with the recent record first. Notice the employee has two records **1 of 2**.

4. Select the Salary Plan tab.

Notice the employee's new Merit with the Effective Date. The record reads **Future** as the request was future dated if the request was current, it would read as **Current**.

C Human Resources (HCM)	HR Administration
Job Information	Work Location Job Information Job Labor Payroll Salary Plan Compensation
Job Data	Mille Gaskill Empl ID 00218029
Workforce Job Summary	Employee Empl Record 0
Manage Employee Profile	Salary Plan Details ⑦ Q
Meadcount ~	Effective Date 03/10/2022 Go To Row
🕹 Labor Administration 🛛 🗸 🗸	Effective Sequence 0 Action Pay Rate Change
A HR Configuration V	HR Status Active Reason Merit Payroll Status Active
	Salary Admin Plan K GSAF - OPEIU Local 100 Grade A01 A01 Grade Entry Date 02/26/2007 Step Step Entry Date
	Job Data Employment Data Earnings Distribution Benefits Program Participation Creditable Adjusted Dates
	Save Return to Search Notify Refresh Update/Display Include History
	Work Location Job Information Job Labor Payroll Salary Plan Compensation

Page 2 of 2 is the previous Pay Rate Change.

Notice the word **Current** on the page once the merit takes effect this will read as **History** for historical information.

C Human Resources (HCM)		HR Administration
4 Job Information	^	Work Location Job Information Job Labor Payroll Salary Plan Compensation
Job Data		Millie Gaskill Empl ID 00219029
Workforce Job Summary		Employee Empl Record 0
Manage Employee Profile		Salary Plan Details 🕐 Q H 4 2 of 2 🗸 🕨
Meadcount	~	Effective Date 01/31/2022 Go To Row
🕹 Labor Administration	~	Effective Sequence 0 Action Pay Rate Change
AR Configuration	~	HR Status Active Reason Merit Payroll Status Active Current
		Salary Admin Plan K GSAF - OPEIU Local 100 Grade A01 A01 Grade Entry Date 02/26/2007 Step Step Entry Date
		Job Data Employment Data Earnings Distribution Benefits Program Participation Creditable Adjusted Dates
		Save Return to Search Notify Refresh Update/Display Include History
		Work Location Job Information Job Labor Payroll Salary Plan Compensation



Lecture 1: Merit Increase (Salary Grade)

The **Compensation** page displays the Compensation Rate listed.

5. Select the **Compensation** tab to see the Compensation Details between Record 1 and Record 2.

Displayed below is the **Effective Date, Action, Reason,** and the **new Compensation Rate** for the **Future** record.

HR Administration										
Work Location	Job Information	Job Labor Payroll	Salary Plan	Compensation						
Millie Gaskill Employee			Emp Empl Rec	ol ID 00218029 cord 0						
Compensation D	Details ⑦						Q	1 of 2 ♥ ▶ ■		
	Effective Date Effective Sequence HR Status Payroll Status	03/10/2022 0 Active Active			Action Pa Reason M	ay Rate Change erit		Go To Row		
 Comparative Pay Rates () Default F 	Compensation Rate 1,760.78×3 USD Frequency B Biweekly > Comparative Information ⑦ > Pay Rates ⑦ Default Pay Components Contract Change Prorate Option									
	Controls	conversion III					N 4 1	I-2 of 2 ∨		
Rate Code	Seq	Comp Rate	Currency	Frequency	Point	s Percen	t Rate C	ode Group		
1 MDBKLY	0	1,690.782975	USD	в						
2 PRMPAY	0	70.000000	USD	в						
Calculat	Calculate Compensation									
Job Data	Employment D	lata Earnings D	istribution	Benefits Prog	ram Participation	n Crea	ditable Adjusted Date	25		



Lecture 1: Merit Record 2 of 2 Increase (Salary Grade) Displayed belo

Displayed below is the **Effective Date, Action, Reason**, and the previous **Compensation Rate** for the **Current** record.

			HR Adm	inistration			
Work Location	Job Information	Job Labor Payroll	Salary Plan Cor	npensation			
Millie Gaskill Employee			Empl ID Empl Record	00218029 0			
Compensation Deta	ails (?)					QI	I
Eff	Effective Date fective Sequence HR Status Payroll Status	01/31/2022 0 Active Active		Acti Reas	on Pay Rate Cha on Merit	ange	Go To Row
с	ompensation Rate	1,680.27	USD		Frequen	су В В	iweekly
 ▶ Pay Rates ⑦ Default Pay Pay Components ③ 	Components			Cont	ract Change Prorat	e Option	
₽ Q Amounts	Controls Chang	es Conversion III				M	
Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	В			
2 PRMPAY	0	70.000000	JUSD	В			
Calculate C	ompensation						
Job Data	Employment Da	ata Earnings	Distribution	Benefits Program Par	ticipation	Creditable Adjus	sted Dates

Lecture 2: MeritSubmitting Merit Increase for a Salary Step.Increase (SalaryNavigate to DPR Salary Change: Human Resources (HCM) > DPR Self-Service > DPRStep)Salary Change

- 1. Select **Search Options** to search for an Employee.
- 2. In the Search your Employees field, enter Employee Name or Employee ID #.
- 3. Select Search.

C DPR Self-Service			
✓ Search Options			
	Search your Employees	Enter Name, Employee ID, Title or Email	Search

4. Select the Employee's Record.

< DPR Self-Service DPR Salary Change						
✓ Search Options						
	Search your Employees	00014872	Search			
Felica Krebs						
Select Employee				1 row		
				î↓		
Name / Title / ID - Reco	rd St	atus / Type	Department			
Ofir Doty Police Records Tech 3 00014872 - 0	Ad Er	tive nployee	CENTRAL RECORDS - PERSONNEL - PD03120100	>		

- 5. Under **Compensation Details**, in the ***Transaction Date** field enter the **effective date of the Merit**.
- 6. In the *Reason field select Merit.
- 7. Under the Salary Plan section, select the next Step.

× Exit			DPR Salary Chang	e				🧶 🗄
Ofir Doty Police Records Tech 3			MD Compensation Detail	MD Rev	2 iew & Submit			Next >
Compensation Details	*Transaction Date 01/31/2022 (***) *Reason Merit v							î
Pay Component		Change Percent	Change Amount New Amount	Current Amount	Currency Code	Туре	Frequency	
MDC Biweekly			2,057.74	2,057.74	USD	Flat Amount	Biweekly	
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly	
Charges Madel Request Tele	85,321 34 Compa Ratio 1,23 21,4827 Roman New Information Blowskly Salary 2,127,74 USD Annual Rate 55,521,24 USD	-	یں 100 تو این 100 تو 2.127 ئ 55.321 ئ	ormation 4 USD 4 USD	6270572 Halonum			
Default Pay Components	Salary Admin Plan K Salary Grade 035 Grade Entry Date 0131/1994 Step Entry Date 0131/2022	GSAF - OPEIU Local 100 035						



Lecture 2: Merit8. Scroll down and select Default Pay Components to refresh the MDC Biweekly rate.Increase (Salary
Step)Notice within the Pay Components Section, the MDBKLY rate adjusted accordingly.
This is the employee's new Biweekly rate.

9. Select Calculate Compensation

10. Select Next.

X Exit			DPR Salary Chang	je			🧐 🕴
Ofir Doty Police Records Tech 3			MD Compensation Detail	MD	—(2) Review & Submit		Next >
	*Reason Merit V						
Pay Component		Change Percent	Change Amount New Amount	Current Amount	Currency Code	Туре	Frequency
MDC Bhreekty			88.06 2,145.80	2,057.74	USD	Flat Amount	Biweekly
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly
	55,321.24 Compa-Ratio:1.23						
	38,148,79 Minimum		45,109.74 Midwaint		62,705.72 Maximum		_
	New Information		Current In	formation			
	Biweekly Salary 2,215.80 USD		2.127	74 USD			
	Annual Rate 57,610.80 USD		55,321	24 USD			
Changes Made Required Field							
Salary Plan							
	Salary Admin Plan K	GSAF - OPEIU Local 100					
	Salary Grade 035	035					
	Grade Entry Date 01/31/1994						
	Step 10 Q						
	Step Entry Date 01/31/2022						
Pay Components			3				
			R, Q				
&Amounts &Controls	C&hanges C&onversion Show All						
"Rate Code	Seq Comp Rate Currency	Frequency Percent Rate Code	Group				
1 MDBKLY C	Q, 0 2,145.80, USD	в	+ -				
2 PRMPAY 0	Q 0 70.00 USD	в	+ -				
Calculate Compensation							

Review the adjustments accordingly. Notice the **Transaction Date, Reason, and the New Information Biweekly Salary** versus **the Current Information Biweekly Salary** regarding the **Biweekly Salary**.

11. In the **Comments** section **enter a brief description of the request**.

(Optional) Select Add Attachment to add any documents.

 Lat. Science: Substrate once ready for processing.

 Modeward Science:

 Lat. Science: S

12. Select **Submit** once ready for processing.

In documents have been attached
Add Attachment
Changes Mode



Lecture 2: Merit Increase (Salary Step)

DPR Request HR Salary Change confirmation page is display and the request is now pending the approval by Central HR.

< HOME	DPR Salary Change
	✓ Your transaction request for Ofir Doty has been successfully submitted for approval.
Ofir Doty Police Records Tech 3	
Submit Confirmation	
DPR Salary Change Approval	
DPR Salary Change Approval	
Pending	
Multiple Approvers Central HR approver	
✓ Comments	
Felica Krebs at 01/31/22 - 2:59 PM Requesting Merit Increase from Step 9 to Step 10 effective 01/31/2	2

	Lesson o. Submitting na Salary Changes
Lecture 3: Pay	Requesting Pay Components (Pay Supplements)
(Pay Supplements)	The Mayor, at their discretion, may change or eliminate any pay supplements designated for non-bargaining unit classified and exempt employees under their purview.
	Special allowances are provided for employees as described in the Pay Plan after approval by the Department Director and the Human Resources Department, or as otherwise designated. It is the responsibility of the concerned department to monitor employees' eligibility for salary supplements and to advise them of the required procedure to obtain supplemental payments. Unless otherwise specified by the terms of a Collective Bargaining Agreement, employees will become eligible for salary supplements effective the beginning of the next pay period following the receipt of all required documentation by the Human Resources Department.
	An eligible employee in a classification assigned to a pay grade or non-step salary range may receive a pay supplement. The value of a one-step pay supplement is 5%.
	Pay Supplements are additional components of pay which are added to an employee's base pay. The types of pay supplements may be in the form of a step increase (1-3 steps), percent, or flat biweekly dollar amount. The calculation of base pay plus supplements is defined as the employee's Compensation Rate. The compensation hourly rate is the rate used to pay all regular and overtime hours.
	Eligibility for supplements may be subject to review and approval by the respective Department Director and the Human Resources Department. Employees become eligible for certification supplements effective the beginning of the first pay period immediately following the receipt of all the required competency milestones."

Within the Pay Components section of the Salary Changes page, DPRs can add or remove components of pay including Leadworker, Night Differential, Licenses & Certifications, Premium Pay, and Special Allowance.

Lesson 6: Submitting HR Salary Changes



Lecture 3: Pay
Components
(Pay
Supplements)Requesting pay components for an employee.Navigate to DPR Salary Change: Human Resources (HCM) > DPR Self-Service > DPR
Salary Change1. Select Search Options to search for an Employee.

- 2. In the Search your Employees field, enter Employee ID, Employee Name, or Classification.
- 3. Select Search.

C DPR Self-Service			
✓ Search Options			
	Search your Employees	Enter Name, Employee ID, Title or Email	Search

4. Select the Employee's Record.

C DPR Self-Service		DPR Salary Change				
✓ Search Options						
	Search your Employees	00197376	Search			
Felica Krebs						
Select Employee				1 row		
				↑↓		
Name / Title / ID - Record		Status / Type	Department			
Georgie Looper Fire Lieutenant 00197376 - 0		Active Employee	SOUTH AREA COMMAND - FR03010200	>		



Lecture 3: Pay Components (Pay Supplements)

- 5. Under **Compensation Details**, in the ***Transaction Date** field enter the **Effective Date** of the pay component.
- 6. In *Reason field select Components of Pay.

× Exit			DPR Salary	/ Change				2
Georgie Looper Fire Lieutenant		MD Con	npensation Detail		2 MD Review & Sub	mit		Next
Compensation Details "Transaction Dat "Reaso	e 01/31/2022							
Pay Component		Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Туре	Frequency
Education Incentive Pay				155.78	155.78	USD	Flat Amount	Biweekly
Fire - B. A.				50.77	50.77	USD	Flat Amount	Biweekly
Fire Paramedic (Protocol Certi				24.000	24.000	%	Percent	Biweekly
Fire Hazardous				125.00	125.00	USD	Flat Amount	Biweekly
MDC Biweekly				3,256.87	3,256.87	USD	Flat Amount	Biweekly
							114,593.86 Compa-Ratio:1.68	
	57,019.04 Minimum		68,182.14 Midpoint			88,728.90 Maximum		
	New Information		Cu	urrent Informatio	n			
Biweekly Salary	4,407.46 USD			4,407.46 USD				
Annual Rate	114,593.86 USD			114,593.86 USD				
Changes Made Required Field								

- 7. Scroll down to the Pay Components Section.
- 8. Select the **Plus (+) sign** on the right side to add a new row.
- 9. On the*Rate Code column of the newly added row, select the magnifying glass for a list of available Pay Components.

Ρ	ay Component	ts							6 rows
								x	Q
	&Amounts	&Controls	C&hanges	C&onversion	Show All				
	*Rate Code		Seq	Comp Rate Current	y Frequency	Percent	Rate Code Group		
	1 EDINCP	۵	0	155.78 , USD	В			+	-
4	2	۹	1	P				+	-
	3 FIRBA	Q	0	50.77 📃 JSD	В			+	-
4	4 FIRPRM	Q	0	819.04 , U SD	В	24.000	MDCMAX	+	-
	5 HZDFIR	Q	0	125.00 元 JSD	В			+	-
(6 MDBKLY	Q	0	3,256.87 📃 JSD	В			+	-
	Calculate Com	pensation							



Lecture 3: Pay Components (Pay Supplements)

An available list of **Pay Components** related to the Classification is displayed. This popup displays all the available **Comp Rate Codes** based on their respective Bargaining Agreement and Classification with their respective **Description**, **Rate Code Type**, and **Rate Code Class** listed.

10. Select LEAD for Leadworker.

Cancel		Lookup		
Search for: Rate Code				
Search Criteria				
✓ Search Results				
				36 rows
Comp Rate Code ♦	Description ◊	Comp Base Pay Switch \diamond	Rate Code Type 🛇	Rate Code Class ♦
FRRSCN	Fire Rescue Response - Non-Emt	Y	Percent	PERCEN
FRSFTY	Fire Safety Bureau Personnel	Y	Flat Amount	1STEP
HFSTP	Half Step	Y	Flat Amount	HLFSTP
HNRGRD	Honor Guard	Y	Flat Amount	FLAT
HZDFIR	Fire Hazardous	Y	Flat Amount	FLAT
HZRDFR	Hazardous Materials - Fire	Y	Flat Amount	1STEP
HZSP	Hazmat Specialist - Fire	Y	Flat Amount	1STEP
INSTC	State Cert.Instrctr - Traing.	Y	Percent	PERCEN
LEAD	Leadworker	Y	Flat Amount	1STEP
LOGIS	Logistical Services - Fire	Y	Flat Amount	1STEP

11. Select Default Pay Components.

12. Select Calculate Compensation.

Notice the LEAD (Leadworker) supplemental pay added to the Pay Components section.

13. Select Next.

× Exit						DP	R Sala	ary Change			🧐 🕴
Georgie Looper Fire Lieutenant					MD	Compensation De	atail		2 MD Review & Submit		
											Next >
		New Int	formation					Current Information			
	Biweekly Salary	4)	600.61 USD					4,407.46 USD			
	Annual Rate	119)	615.88 USD					114,593.86 USD			
Changes Made * Required Field											
Salary Plan											
	Salary Admin Plan	с		IAFF Local 1403	- Firefighters						
	Salary Grade	004			004						
	Grade Entry Date	10/20/20	03								
	Step	9		Q,							
	Step Entry Date	10/20/20	03								
Default Pay Component	ts										
Pay Components							6 rows				
	and California		enter Chand			154	a				
"Rate Code	uois Cananges	Sea C	Comp Rate Curren	cy Frequency	Percent Rate Code Gr	auc					
1 EDINCP	Q	0	155.78 USD	в		+	-				
2 FIRBA	Q,	0	50.77 USD	в		+	-				
3 FIRPRM	Q,	0	856.427USD	в	24.000 MDCMAX	+					
4 HZDFIR	٩	0	125.00 70 SD	в		+	-				
5 LEAD	Q	0	155.77 USD	в		+	-				
6 MDBKLY	۹	0	3,256.87 USD	в		+	-				
Calculate Compensatio	n										



Lecture 3: Pay Components (Pay Supplements)

14. In the **Comments** section, enter a brief description of the request.

NOTE: Approved HR Compensation Memorandums are required when adding some Components of Pay.

15. Select **Add Attachment** to add the authorized Compensation Memo granting the employee the components of pay.

× Exit	DPR Salary Change					
Georgie Looper Fire Lieutenant		MD Compensation Detail	MD Review & Submit			
				< Previous	Submit	
Review and Submit						
Transaction Date	01/31/2022					
Reason	Components of Pay					
	New Information	Current Information				
Biweekly Salary	4,600.61 USD	4,407.46 USD				
Annual Rate	119,615.88 USD	114,593.86 USD				
Comments						
Per approved HR Compensation Memo effect Attachments No documents have been attached. Add Attachment	ive 0131/2022 adding Leadworker pay (LEAD).					
 Changes Made * Required Field 						

16. Select My Device.

× Exit		DPR Request Ad Hoc Salary Change		n :
A Jonathan Litt Fire Lieutenant		1 MD Compensation Detail	MD Review & Submit	
Daview and Submit				C Previous Succinit
Transaction Date 11/	/30/2021			
Reason Ott	ther			
Ne	ew Information	Current Information		
Biweekly Salary	4,556.80 USD	4,405.55 USD		
Annual R		File Attachment	×	
Comments Choose	e From			
Per HR Compensation Memo effective 11/30/21 add				
Attachments	ly Device			
No documents have been attached.				
Add Attachment				
· · · · · · · · · · · · · · · · · · ·				
Changes Made Required Field				



Lecture 3: Pay Components (Pay Supplements) 17. Locate and select the documentation.18. Select Open.

👂 Open				
← → × 📙 > Thi	is PC → Desktop → INFORMS R2 → HR Guide	> Attachments	✓ Č	rch Attachments
Organize 🔻 New folde	er			III 🔹 💶 【
📃 Desktop 🛛 🖈 ^	Name	Date modified	Type Siz	.e
🕂 Downloads 🖈	🧱 Comp Memo Establishing Position	7/8/2013 11:30 AM	Microsoft Edge P	52 KB
🚆 Documents 🖈	Compensation Memo for LW - Copy	7/8/2013 11:30 AM	Microsoft Edge P	52 KB
📰 Pictures 🛛 🖈	💼 Deactivate Position 00003294 (1-5-22)	1/5/2022 3:52 PM	Microsoft Word D	12 KB
Attachments	📴 License Certification (12-1-21)	7/8/2013 11:30 AM	Microsoft Edge P	52 KB
PHIRE Issues				
Remedy Screen :				
Reports				
OneDrive				
💻 This PC				
🧊 3D Objects				
🗖 Desktop 🗸 🗸				
File na	ame: Compensation Memo for LW - Copy		~ All Files	~
	L		Оре	n Cancel

19. Select Upload.

	File Attachment
Choose From	
My Device	
Upload Clear	
Compensation Memo for LW - Copy.pdf File Size: 51KB	



20. Once the upload is complete, select **Done**.

Lecture 3: Pay			
Components			
(Pay			
Supplements)			

	File Attachment	Done
Choose From		
My Device		
Compensation Memo for LW - Copy.pdf File Size: 51KB		
		Upload Complete

- 21. Review the adjustments accordingly. Notice the **Transaction Date, Reason, the New Biweekly Salary Information** versus **the Current Information Biweekly Salary Information, Comments, and Attachments**.
- 22. Select **Submit** once ready to submit the request.

× Exit			DPR Salary C	hange				2
Georgie Looper Fire Lieutenant			1 MD Compensation Detail		2 MD Review & Submit			
							< Previous	Submit
Review and Submit								
	Transaction Date 01/31/2 Reason Compo	2022 onents of Pay						
	New	Information	Cun	rent Information				
	Biweekly Salary	4,600.61 USD		4,407.46 USD				
	Annual Rate 11	19,615.88 USD		114,593.86 USD				
Comments								
Per approved HR Comp	ensation Memo effective 01/3	1/2022 adding Leadworker pay (LEAD).]		
Attachments								
+								
File Name			Description	DateT	īme Attached			
Compensation_Memo_1	for_LWCopy.pdf		Compensation_Memo_for_	02/10/	22 2:38:38PM	Ū		
Changes Made Required Field								

The DPR Salary Change Request has been successfully submitted and pending approval by Central HR.

C HOME		DPR Salary Change	
		\checkmark Your transaction request for Georgie Looper has been successfully submitted for approval.	
Georgie Looper Fire Lieutenant			
Submit Confirmation			
DPR Salary Change Approv	/al		
	View/Hide Comments		
DPR Salary Change Approval			
Pending			
Central HR approvers			
L			
Felica Krebs at 02/1 Per approved HR Cor	0/22 - 2:40 PM npensation Memo effective 01/31/2022 adding	Leadworker pay (LEAD).	



Lecture 4: Pay Components (Licenses/ Certifications)

The employee can submit a request to add a License or Certification via Employee Self-Service. The DPR then reviews and ensures all proper, active documents are enclosed and request the salary change to add the License/Certification pay.

NOTE: If an employee does not have access or otherwise able access to submit the request via Employee Self-Service, the employee's manager or the DPR must manually enter the submission via Manage Employee Profile first before submitting a Salary Change Request.

The following is the manual **Manage Employee Profile** entry process where the DPR can add the License/Certification to the employee's profile to later submit the Salary Change Request.

Navigate to Manage Employee Profile: Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile

- 1. Select Find an Existing Value tab.
- 2. In the Empl ID field enter the Employee's 8-digit Numeric Identification Number.
- 3. Select Search.

K Human Resources (HCM)		HR Administration
Sob Information	Person Profiles	
Job Data	Enter any information you have and click Search. Leave fields blank for a list of all values.	
Workforce Job Summary	Find an Existing Value	
Manage Employee Profile	▼ Search Criteria	
Neadcount V	Empl ID begins with 🗸	
🕹 Labor Administration 🛛 🗸 🗸	Profile Type begins with 🗸	
👬 HR Configuration 🗸 🗸	Name begins with 💙	
	Last Name begins with 🗸	
	Alternate Character Name begins with 🗸	
	Case Sensitive	
	Search Clear Basic Search 🖉 Save Search Criteria	



Lecture 4: Pay Components (Licenses/ Certifications)

Notice the employee's information is displayed.

- 4. Select the **Qualifications** tab.
- 5. Under Licenses and Certification select the Add New Licenses and Certifications hyperlink.

Human Resources (HCM)	HR Adm	ninistration
Job Information	Person Profile	
Job Data	Empl ID 00219546 Kaylani Oleary	
Workforce Job Summary	Profile Type PERSON Person "Profile Status Active	
Manage Employee Profile	*Description Kaylani Oleany	
Meadcount ~	Print Comments [Select Actions]	• 🛞
🕹 Labor Administration 🛛 🗸 🗸	FIUNE ACAUNS	
👬 HR Configuration 🔶	Education Qualifications Veterans' Preference Additional Information MDC Blue Book	
	 Honors and Awards There are currently no Honors and Awards for this profile. Please add one if required. Add New Honors and Awards Language Skills 	
	Save	
	Return to Search	Add

Lecture 4: Pay Components
(Licenses/
Certifications)
The Person Profile pop-up page is displayed.
In the *Issue Date field, enter the issue date of the license/certification.
In the *License field, select the magnifying glass to search for the qualified license/certification.
In the Country field, enter USA.

- 9. In the **State** field, enter **FL**.
- 10. Select the License Verified check box once verified.

NOTE: It is important that this check box is selected once the license has been verified.

- 11. In the **Expiration Date** field, enter the **expiration date of the license/certification**.
- 12. In the License/Certification Number field enter the License/Certification number.
- 13. In the **Issued By** field, enter the **qualified agency that issued the employee's license/certification**.
- 14. Select OK.

Person Profile							
						Help	
Add New	Licenses and Certification	ons					
	Empl ID 00219546	Kaylani Ole	ary				
	Profile Type PERSON	Person					
Add item detai additional item	Is. Select OK to apply changes and s.	I return. Select Cancel to return	without making any changes. Sele	ect Apply and	Add Another to continue adding		
Details			م		< 1 of 1 ♥ ▶ ▶	View A	
	*Issue Date	01/01/2022				+	
	ti iconeo	CBBO O	Cert Public Purchasing Officer				
	License	CFF0 4					
	Country	USA Q	United States				
	State	FL Q					
		License Verified	Florida				
	Expiration Date	01/01/2025]				
	License/Certification Number	CPP12345		Ľ			
		246 characters remaining		11			
	lanual Du	246 characters remaining		ď			
	Issued By	Universal Public Procurement	Certification Council (UPPCC)				
		196 characters remaining			-		
ОК	Cancel	Apply and Add And	ther				



Lecture 4: Pay Components (Licenses/ Certifications)

Notice the License/Certification has been added withing the Licenses and Certifications Section.

15. Under **Attachment**, select the **paper clip** to add the license/certification documentation.

K Human Resources (HCM)				HR Administ	ration
bob Information	Person Profile				
Job Data		Empl ID 00219546 Kaylani Q	leary		
Workforce Job Summary	Profi	file Type PERSON Person e Status Active V			
Manage Employee Profile	*Des	scription Kaylani Oleary			
Meadcount	Print 🕫 Comme	nts	[Select Action]	~ ⊗	
🕹 Labor Administration	~		Profile Actions		
R Configuration	Education	Qualifications Veterans' Preference	Additional Information MDC B	Je Book	
	 Add New Honor Language Skil There are current Add New Langu Licenses and Comparison Licenses and Comparison CPPO Add New Licens Memberships There are current Add New Memberships There are current Add New Memberships There are current Add New Comparison 	s and Awards Is tty no Language Skills for this profile. Please tty no Language Skills for this profile. Please tty no Cert Public Purchasing Officer tty no Memberships for this profile. Please ac tty no Memberships for this profile. Please a tty no Competencies for this profile. Please a	add one if required.	< 1-1 of 1	View All
	Save				
	Return to Search				Add

16. Select Add Attachment to enclose the license/certification documentation.

Profile Item Attachments	×
	Help
No attachments have been uploaded for this profile item. Add Attachment	
OK Cancel	



Lecture 4: Pay Components (Licenses/ Certifications)

17. Select Choose File and select the file from the computer.18. Select Upload.

	File Attachment ×
	Help
Choose File	License Certification (1-1-22).pdf
Choose File	No file chosen
Upload	Cancel

19. In the **Description** field, enter a **brief description**.20. Select **OK**.

	Profile Item Attachments			
				Н
Attachments				
≡ Q	14	1-1 of 1 🗸 🕨		
File Name	Description	Attached On		
License_Certification_(1-1-22).pdf	CPPO K. Oleary 01-01-22	02/01/2022 9:45:06AM	Î	
Add Attachment	Ĩ			
	,			
OK Cancel				



	Lesson		ung r	ik Salary	Change	5		
Lecture 4: Pay Components	21. Once all supp	porting docu	mentat	ion is enclo	sed, select S	Save.		
(Licenses/	C Human Resources (HCM)						HR Adminis	stration
(Licenses/ Certifications)	Human Resources (HCM) Job Information Job Data Workforce Job Summary Manage Employee Profile Labor Administration HR Configuration	 Person Profile E Profile Profile Profile Profile Posc Print © Comment Education (Education (Honors and Aw There are current + Add New Lenses Licenses and Cer Q D CPPO + Add New Lenses Memberships There are current + Add New Membe Competencies There are current + Add New Membe Competencies There are current + Add New Compe 	Empl ID 0021954 le Type PERSO Status Active cription Kaylani (s ards ty no Honors and A and Awards s ty no Language Sk ty no Language Sk ty no Language Sk trifications License Cert Public Purc as and Certification ty no Memberships ty no Competencie	IS Kaylani Qi N Person Deary Veterans' Preference wards for this profile. Please ills for this profile. Please ad hasing Officer s for this profile. Please add s for this profile. Please add	eary Profile Actions [Select Additional Information Additional Information add one if required. d one if required. d one if required. d one if required.	t Action]	HR Adminis	stration
		Return to Search]					Add

The DPR can now submit the Salary Change request to add the license/certification pay component for the respective employee via DPR Salary Changes.

Lesson 6: Submitting HR Salary Changes



Lecture 4: Pay Components (Licenses/ Certifications)

Navigate to DPR Salary Change: Human Resources (HCM) > DPR Self-Service > DPR Salary Change

- 1. Select Search Options to search for the Employee.
- 2. In the Search your Employees, field enter Employee ID, Employee Name, or Classification.
- 3. Select Search.

C DPR Self-Service			
✓ Search Options			
	Search your Employees	Enter Name, Employee ID, Title or Email	Search

4. Select the **Employee's Record.**

C DPR Self-Service				DPR Salary Change	
✓ Search Options					
	Search your Employees	00219546	Search		
Felica Krebs				-	
Select Employee					1 row
					$\uparrow\downarrow$
Name / Title / ID - Record		Statu	s / Type	Department	
Kaylani Oleary Procurement Contracting Ofc 1 00219546 - 0		Active Emplo	yee	PROCUREMENT - ID08010000	>



Lecture 4: Pay Components (Licenses/ Certifications)

5. In the ***Transaction Date** field, enter the **effective date of the transaction which is the first day of the beginning of pay period after employee's certification issued date.**

NOTE: The effective date for Licenses/Certifications is the first of the beginning of the pay period after the employee's certification issued date.

- 6. In the ***Reason** field, select **Components of Pay** for License/Certifications.
- 7. In the **Pay Components** section, select the **Plus sign (+) to add the *Rate Code for the License/Certification**.
- 8. A new row will appear, select the magnifying glass to select the License/Certification Rate Code.





Lecture 4: Pay Components (Licenses/ Certifications)

A list of qualifying Comp Rate Codes will be displayed.

9. Select the **Comp Rate Code** related to the **License/Certification**.

Cancel		Lookup		
Search for: Rate Code				
Search Criteria				
 Search Results 				
				8 rows
Comp Rate Code 🛇	Description \diamondsuit	Comp Base Pay Switch \Diamond	Rate Code Type 🛇	Rate Code Class \diamondsuit
CARALW	Car Commuting Allowance	Y	Flat Amount	FLAT
HFSTP	Half Step	Y	Flat Amount	HLFSTP
LEAD	Leadworker	Y	Flat Amount	1STEP
MDBKLY	MDC Biweekly	Y	Flat Amount	FLAT
NGT1S	Night Differential	Y	Flat Amount	1STEP
NGT2	Night Differential	Y	Flat Amount	2STEP
PRCHCT	Purchasing Or Contract Procure	Y	Flat Amount	1STEP
PRMPAY	Premium Pay	Y	Flat Amount	FLAT



Lecture 4: Pay	
Components	Notice the License/Certification Rate code is now added.
(Licenses/	10. Select Default Pay Components.
Certifications)	11. Select Calculate Compensation.

INFORMS has now properly calculated the employee's new Biweekly Salary.

12. Select Next.

x Enit					DPR Sala	ry Change				2
Kaylani Oleany Procurement Contracting Dfc 1				MD Comp	ensation Detail		2) MD Review & Sal	bmit		Next
Compensation Details										
	"Transaction Date 'Reason	01/10/2022								
Pay Component				Change Percent	Change A	nount New Amount	Current Amount	Currency Code	Туре	Frequency
MDC Biweekly						2.674.10	2,674.10	USD	Flat Amount	Biweekly
Purchasing Or Contract Procure						131.94 131.94		USD	Flat Amount	Biweekly
Premium Pay						70.00	70.00	USD	Rat Amount	Biweekly
				71,048.80 Compa-Parko:1.87						
		64,802.02			98,472,80			98,792.59		
		Winnen			Witpoint	Current Information		Maximum		
	Riwookty Salary	2.876.04 USD				2.744 10 USD				
	Annual Rate	74,777.04 USD				71,346.60 USD				
Charana Maria										
* Required Field										
Salary Plan										
	Salary Admin Plan	к		GSAF - OPEIU Local 100						
	Salary Grade	106		108						
	Grade Entry Date	06/11/2007								
	Step	6 Q,								
26.42.0	Step Entry Date	06/11/2007								
Pay Components					3 row					
					F ₄ Q					
Amounts Controls Change	s Conversion She	ow All								
*Rate Code		Seq Comp Rate Currency	Frequency	Percent Rate Code Group						
1 MDBKLY Q		0 2.674.10, USD	B		+ -					
2 PRCHCT Q		0 131.947USD	в		+ -					
3 PRMPAY Q		0 70.00 , U SD	в		+ -					
Calculate Compensation										

Lecture 4: Pay Components (Licenses/ Certifications)

- 13. Review the **New Information** section versus the **Current Information** section. Notice the new **Biweekly Salary**.
- 14. In the **Comments** section, add a **brief description** for the request.
- 15. Select the Add Attachment to add any supporting documentation.
- 16. Review and ensure the request is complete then select **Submit**.

× Exit		DPR Salary Change		Q :
Kaylani Oleary Procurement Contracting	Ofc 1	MD Compensation Detail	2 MD Review & Submit	< Previous Submit
Review and Submit	Transaction Date 01/10/2022			
	Reason Components of Pay New Information Biweekly Salary 2,876.04 USD	Current Information 2,744.10 USD		
Comments	Annual Rate● 74,777.04 USD	71,346.60 USD	J	
Request to add the ver	fied CPPO Certification effective 01/10/2022			
Attachments No documents have bee	in attached.			
Add Attachment Changes Made Required Field				

The License/Certification Salary request has been successfully submitted pending the approval of Central HR.

(HOME		DPR Salary Change	
		✓Your transaction request for Kaylani Oleary has been successfully submitted for approval.	
Kaylani Oleary Procurement Contracting Ofc 1			
Submit Confirmation			
DPR Salary Change Approval			
🔻 : Pending 👳	View/Hide Comments		
DPR Salary Change Approval			
Pending			
Multiple Approvers			
Central HR approver			
✓ Comments			
Felica Krebs at 02/11/22 - 9:50 AN Request to add the verified CPPO 0	Certification effective 01/10/2022		



Lecture 5: Review Salary Changes via Job Data (Salary Grade)

On the Job Data page, users can review Salary Changes once the Payroll, Time, and Attendance (PTA) Division has reviewed and approved the request.

Navigate to Job Data: Human Resources (HCM) > HR Administration > Job Information > Job Data

- 1. Select Find an Existing Value.
- 2. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.

C Human Resources (HCM)		HR Administration
4 Job Information	Job Data	
Job Data	Enter any information you have and click Search. Leave fields blank for a list of all values.	
Workforce Job Summary	Find an Existing Value Keyword Search	
Manage Employee Profile	▼ Search Criteria	
Neadcount	Empl ID begins with 🗸	
Labor Administration	Empl Record = •	
AR Configuration	Name begins with 🗸	
Dotted Line	Last Name begins with 🗸	
류 Export Org Chart	Second Last Name begins with 🗸	
🏦 OnBoarding	Alternate Character Name begins with 🗸	
A OffBoarding	Middle Name begins with v	
	Search Clear Basic Search 🖾 Save Search Criteria	

3. Select Search.

Lecture 5: Review Salary Changes via Job Data (Salary Grade)

4. Select the **Compensation** tab.

Notice the most recent record. **1 of 2**, the **Effective Date**, **Effective Sequence**, **Action**, **Reason**, and the new **Compensation Rate**.

5. Within the **Pay Components** section, select the **Amounts** tab.

Notice the **Comp Rate** with the new Merit Increase.

				l	HR Administ	ration			
Work Location	ormation	Job Labor Payroll	Salary Plan Co	ompensation					
laudette Mclean mployee			Empl ID Empl Record	00218029 0					
Compensation Details ⑦						Q	I. H. 🔍 🕇	of 2 🗸	•
Effect Effective Se Hf Payrol	equence 1 Status Act	24/2021 tive tive		Act Reas Job Indica	ion Pay Rate C son Merit tor Primary Job	hange	Go	To Row	
Compensative Information	ntion Rate	1,670.27	USD Q		*Frequer	ncy BQ	Biweekly		
▼ Pay Rates ③									
Biweekly Annual		1,670.269500 USD 43,427.007000 USD	Hourly Monthly		20.878369 (3,618.917250 (JSD JSD			
Default Pay Compo	nents)		Con	tract Change Pror	ate Option			
■ Q						K	1-2 of 2	*	
Amounts Controls	Changes	Conversion							
*Rate Code	Seq (Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY Q	0	1,610.269500	USD Q	B Q				+	-
2 PRMPYK Q	0	60.000000,	USD	В				+	-
Calculate Compens	ation	1							
Job Data Em	ployment Data	Earnings D	Distribution	Benefits Program Par	ticipation	Creditable A	djusted Dates		
Save Return to Searc	h Notify	Refresh			Upda	ite/Display	nclude History	Согте	ct Histo



Lecture 5: Review Salary Changes via Job Data (Salary Grade)

6. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

					HR	Adminis	stration			_
Work Location	Information	Job Labor Payroll S	alary Plan	Compensation]					
udette Mclean			Emp	ID 00218029						
ployee			Empl Rec	ord 0						
ompensation Details)						(αι ⊮ ∢ [1 of 2 🗸	•
Effe	ctive Date 11/2	4/2021						G	o To Row	
Effective	Sequence 1				Action	Pay Rate C	change			
1	HR Status Activ	/e			Reason	Merit				
Рауг	oll Status Activ	/e			Job Indicator	Primary Jo	b		Current	
Compen	sation Rate	1.670.27	ISD Q			*Freque	ncy B	Q. Biweekly		
Comparativo Informa	tion (1)	.,						,		
 Comparative morma 										
Pay Rates ⑦										
Biweekly		1,670.269500 USD	Hourly		20	0.878369	USD			
Annual		43,427.007000 USD	Monthly		3,618	8.917250	USD			
Default Pay Com	ponents				Contract (Change Pro	rate Option			
ay Components ⑦										
₽ Q								€	2 🗸 🌗	
Amounts Controls	Changes	Conversion III								
*Rate Code	Seq	Change Amount	Curr	ency	Frequency		Change Points	Change Percent		
	0	76.6795	00 🛒 USE	Q	Biweekly			5.000	+	-
2 PRMPYK Q	0	0.00	0000 🛒 USD		Biweekly			0.00	• •	-
Calculate Compe	nsation									
lab Data	in the second second second		-11	Description of	Description in the second second		0	the Advected Det		
JOD DATA E	mpioyment Data	Earnings Dist	ribution	Benefits F	rogram Participa	auon	Credita	able Adjusted Dates		
Return to Sea	rch Notify	Refresh				Upda	ate/Display	Include History	Corre	ct Histo
Location Job Informat	tion Job Labor	Payroll Salary Plan Co	ompensation							

Lecture 5: Review Salary Changes via Job Data (Salary Grade)

Listed below is the initial record of the employee. Notice the displayed record **2 of 2**, **Effective Date**, and the previous **Compensation Rate** and ***Rate Code** before the merit increase.

							U	P Administ	ration			
							n	K Auminisi	rauon			
Work Location	Job Information	Job <u>L</u> abor	Payroll	Salary Plan	Con	pensation						
audette Mclean				Em	ipl ID	00218029						
nployee				Empl Re	ecord	0						
Compensation Deta	ils ⑦								(Q 4 4	2 of 2 🗸	•
_	Effective Date										Go To Row	
Effe	ctive Sequence	12/28/2020					Actio	n Data Chano	1e			
	HR Status	Active					Reaso	n	-			
	Payroll Status	Active					lob Indicato	or Primary Job	0		History	
	mennetien Dete		_	USD Q				*Freque	ncy B	Q	Thistory	
Col	npensation Rate		1,593.59							Biweekly		
Comparative Info	ormation ⑦											
▼ Pay Rates ②												
Biweekly		1,593.5900	00 USD	Hourly				19.919875	USD			
Annual		41,433.3400	00 USD	Monthly			3,4	452.778333	USD			
		_					_					
Default Pay	Components						Contra	act Change Pror	ate Option			
Pay Components ?)											
Γ, Q										I I I I I I I I I I I I I I I I I I I	2 of 2 🗸 🕨	
Amounts C	ontrols Chang	jes Convers	ion >									
*Rate Code	Seq	Comp Rate		Currency		Frequency	1	Points	Percent	Rate Code Group		
1 MDBKLY Q	0	1,5	33.590000 🛒	USD	Q	В	۹				+	-
2 PRMPYK Q	. 0		60.000000	USD		В					+	-
Calculate Co	ompensation											
Guiouidie Ci												
lab Data	Comburged D		Family at Di			Denefit D		-1	0			
JOD LIATA	Employment Da	на	Earnings Di	SUIDUTION		Benetits Pr	ogram Parti	cipation	Creditab	ne Adjusted Dates	ó	
Paulo Date	Caarah	if. Dof						Durate		Include Lists	n. C	oot Histor
save Return to	Not	Refresh						Upda	nerbispiay	Include Histo	Corr	ect Histor
k Location Job Inf	ormation Job La	bor Payroll	Salary Plan (Compensation								





Lecture 5:
Review Salary
Changes via Job
Data (Salary
Step)Review the Salary Change request for a Salary Step employee.
Navigate to Job Data: Human Resources (HCM) > HR Administration > Job Information
> Job DataData (Salary
Step)1. Select Find an Existing Value.
2. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.

C Human Resources (HCM)				HR Administration
Job Information	^	Job Data		
Job Data		Enter any information you hav	e and click Search. Leave fields blank for a list of all value	S.
Workforce Job Summary		Find an Existing Value	Keyword Search	
Manage Employee Profile		▼ Search Criteria	-	
Neadcount	~	Empl ID	begins with 🗸	
🕹 Labor Administration	~	Empl Record	= •	
R Configuration	~	Name	begins with 🗸	
Line		Last Name	begins with 🗸	
🔜 Export Org Chart		Second Last Name	begins with 🖌	
🏦 OnBoarding	~	Alternate Character Name	begins with 🖌	
A OffBoarding	~	Middle Name	begins with V	
		□Include History □Corre	ect History 🗌 Case Sensitive	
		Search Clear Ba	sic Search 🖉 Save Search Criteria	

3. Select Search.





Lecture 5: Review Salary Changes via Job Data (Salary Step)

4. Select the **Salary Plan** tab.

Notice the most **Current** record **1 of 1**, the **Effective Date**, **Action**, **Reason**, **Step** and **Step Entry Date**. The non-job basis employee's salary change request for the merit increase from **Step 9 to Step 10** was processed with the effective date of **1/31/2022**.

			HR	Administration	
Work Location	Job Information	Job Labor Pay	roll Salary Plan	Compensation	
Ofir Doty Employee			Empl ID 00 Empl Record 0	0014872	
Salary Plan De	tails ⑦			Q	¶ ¶ 1 of 1 ∨ ▶ ▶
E	Effective Date 01/3 ffective Sequence 0 HR Status Acti Payroll Status Acti	31/2022 ve ve		Action Pay Rate Change Reason Merit	Go To Row
	Salary Admin Plan K Grade 03 Step 10	GSAF - OPE 035	EIU Local 100	Grade Entry Date 01/31/1994 Step Entry Date 01/31/2022	Current
Job Data	Employment D	ata E	arnings Distribution	Benefits Program Participation	Creditable Adjusted Dates
Save Re Work Location	turn to Search Pre	evious in List Ne. abor Payroll Salar	xt in List Notify y Plan Compensation	Refresh	Update/Display Include History

Lecture 5: Review Salary Changes via Job Data (Salary Step) 5. Select the **Compensation** tab.

6. Within the **Pay Components** section, select the **Amounts** tab.

Notice the **Comp Rate** with the new Merit Increase.

Work Location	Job Information	Job <u>L</u> at	bor <u>P</u> ayroll	<u>S</u> alary Plan	Compensation					
fir Doty				Em	pl ID 00014872					
mployee				Empl Re	cord 0					
Compensation D	Details ⑦							Q	Ⅰ Ⅰ	of 1 🗸 🕨
	Effective Dat	e 01/31/202	22						Go To	Row
	Effective Sequence	e 0				Action	Pay Rate Ch	ange		
	HR Statu	s Active				Reason	Merit			
	Payroll Statu	s Active								urrent 🗇
Comparative	Information ⑦		_,	J×= 050			Frequen	ncy B	Biweekly	
Comparative Pay Rates ③ Default F Pay Components © Q	Pay Components s ⑦	annes	Conversion	Jæ USD		Contract	Frequen	te Option	Biweekly	v
Comparative Pay Rates Pay Rates Default F Pay Components Q Amounts Rate Code	Information ⑦ Pay Components s ⑦ Controls Ch Seq	anges C Comp Ra	Conversion +	Currency	Frequency	Contract (Change Prora	te Option	Biweekly	~ • •
Comparative Pay Rates ? Default F Pay Components Q Amounts Rate Code	Information ⑦ Pay Components s ⑦ Controls Ch Seq	anges Comp Ra	Conversion }	Currency	Frequency	Contract (Frequer Change Prora	te Option Percent	Biweekly	v Þ Þi
Comparative Pay Rates ? Default F Pay Component: Q Amounts Rate Code 1 MDBKLY	Information ⑦ Pay Components s ⑦ Controls Ch Seq	anges Comp Ra	Conversion III	Currency USD	Frequency B	Contract I	Frequer	te Option Percent	Biweekly	up
Comparative Pay Rates ? Default F Pay Components Q Amounts Rate Code 1 MDBKLY 2 PRMPAY	Information (?) Pay Components s (?) Controls Ch Seq	anges C Comp Ra 0 0	Conversion III ate 2,145.8000 70.0000	Currency 000, USD	Frequency B B	Contract (Frequer	te Option Percent	Rate Code Gro	up
Comparative Pay Rates ? Default F Pay Components Q Amounts Rate Code 1 MDBKLY 2 PRMPAY Calculat	Information ⑦ Pay Components s ⑦ Controls Cr Seq te Compensation	anges C Comp Ra 0 0	Conversion III ate 2,145.8000 70.0000	Currency 000, USD 000, USD	Frequency B B	Contract (Frequer	te Option Percent	Biweekly	up


Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (Salary Step)

7. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

					н	R Administration					
Work Location	Job Information	Jot	b Labor	Payroll	Salary Plan	Compensation					
fir Doty mployee					Empl	Empl ID 00014872 Record 0					
Compensation D	etails ⑦								Q	1 1	1 of 1 🗸
	Effective Da Effective Sequen HR State Payroll State	te 01/31 ce 0 us Active us Active	1/2022 e e				Action Reason	Pay Rate Chan Merit	ge		Go To Row
 Comparative Pay Rates (?) 	Information ⑦							. ,	2	,	
Default F	Pay Components						Contract	Change Prorate	Option		
Default I Pay Components Q Amounts	Pay Components s ⑦ Controls Ci	langes	Conversio	on ∐▶			Contract	Change Prorate	Option	1-2	of 2 🗸 🕨 🕅
Pay Component: Q Amounts Rate Code	Controls Cep	anges	Conversio Change Amo	on II»		Currency	Contract	Change Prorate d	Option	Change Per	of 2 v 🕨 🕨
Default I Pay Components Image: Components Image: Components Rate Code 1 MDBKLY	Controls Cl Seq	nanges 0	Conversio Change Amo	on II▶ ount	8.060000 🛒	Currency	Contract Frequency Biweekly	Change Prorate I	Option	Change Per	of 2 v 🕨 🕨
Pay Component: Pay Component: Pay Q Amounts Rate Code 1 MDBKLY 2 PRMPAY	s ⑦ Controls Controls Seq	nanges 0 0	Conversio Change Amo	on II⊁ ount 88	3.060000 🛒	Currency USD	Contract Frequency Biweekly Biweekly	Change Prorate I	Option hange oints	Change Per	of 2 v b bl cent 4.279 0.000
Default i Pay Components Pay Components Pay Amounts Rate Code 1 MDBKLY 2 PRMPAY Calculat	Pay Components s ⑦ Controls CI Seq e Compensation	anges 0 0	Conversio Change Amo	on II> punt 88 C	3.060000 ;] 3.000000 ;]	Currency USD USD	Contract Frequency Biweekly Biweekly	Change Prorate I	Option	Change Per	of 2 • • • • • • • • • • • • • • • • • •

Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (Pay Components)

Review the Salary Change for requested Pay Components.

Navigate to Job Data: Human Resources (HCM) > HR Administration > Job Information > Job Data

- 1. Select Find an Existing Value.
- 2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
- **HR Administration** C Human Resources (HCM) 🌯 Job Information \sim Job Data Job Data Enter any information you have and click Search. Leave fields blank for a list of all values. Workforce Job Summary Find an Existing Value Keyword Search Manage Employee Profile Search Criteria 🛂 Headcount \sim Empl ID begins with v Empl Record = ~ 🕹 Labor Administration \sim R Configuration \sim Name begins with v Last Name begins with V Line Second Last Name begins with ~ 🕂 Export Org Chart Alternate Character Name begins with 🗸 👬 OnBoarding \sim Middle Name begins with v A OffBoarding \sim □ Include History □ Correct History □ Case Sensitive Basic Search 🖉 Save Search Criteria Search Clear
- 3. Select Search.



4. Select the **Compensation** tab.



Lecture 5: Review Salary Changes via Job Data (Pay Components)

Notice the **Current** record **1** of **1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee's salary change request for the Leadworker (LEAD) pay component was approved and processed with the effective date of **1/31/2022**.

										HR Ad	dministration	
V	Vork Location	Job I	Information	Jot	b <u>L</u> abor	Payroll	Salary Plan	Compensation				
Georg	ie Looper vee				1		Er Empl R	mpl ID 00197376 ecord 0				
Cor	npensation [Details (1	D								QI	1 of 1 🗸 🕨 🕅
		Effective Pay	ective Date e Sequence HR Status yroll Status	01/31/ 0 Active Active	2022				Action Reason	n Pay Rate Cha Components	ange of Pay	Go To Row
Ţ	Comparativ	Compe e Informa	nsation Rat	e		4,600.61	USD			Frequen	cy B B	- Current -
		Chang Chang	e Amount e Percent		193.1	54800	USD Biwee Compa	kly -Ratio 1.46				
Pay	Pay Rates (Default Component	Pay Comp s ?	ponents						Contra	ct Change Prorate	e Option	< 1-6 of 6 V > >
	Amounts	Control	s Cha	nges	Conver	sion ∥▶						
	Rate Code		Seq	Comp	Rate		Currency	Frequency		Points	Percent	Rate Code Group
1	EDINCP			0		155.78000	USD	В				
2	2 FIRBA			0		50.77000	USD	в				
3	FIRPRM			D		856.42080	USD	в			24.000	MDCMAX
4	HZDFIR			0		125.00000	USD	в				
ę	5 LEAD			D		155.77000) USD	В				
6	MDBKLY			þ		3,256.87000	J USD	В				
	Calcula	te Compe	nsation									
	lob Data	E	mployment	Data		Earnings	Distribution	Benefits Pro	gram Partic	ipation	Creditable Adjus	sted Dates



Lecture 5: Review Salary Changes via Job Data (License/ Certifications) 1.

Review the Salary Change for requested License/Certification Pay Components.

Navigate to Job Data: Human Resources (HCM) > HR Administration > Job Information > Job Data

- 1. Select Find an Existing Value.
- 2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
- **HR Administration** C Human Resources (HCM) 🌯 Job Information \sim Job Data Job Data Enter any information you have and click Search. Leave fields blank for a list of all values. Workforce Job Summary Find an Existing Value Keyword Search Manage Employee Profile Search Criteria 🛂 Headcount \sim Empl ID begins with v Empl Record = ~ 🕹 Labor Administration \sim R Configuration \sim Name begins with v Last Name begins with V Dotted Line Second Last Name begins with ~ 🕂 Export Org Chart Alternate Character Name begins with 🗸 👬 OnBoarding \sim Middle Name begins with v A OffBoarding \sim □ Include History □ Correct History □ Case Sensitive Basic Search 🖉 Save Search Criteria Search Clear
- 3. Select Search.

Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (License/

Certifications)

4. Select the **Compensation** tab.

Notice the **Current** record. **1 of 1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee's salary change request to add the **Procurement or Contract Procure (PRCHCT)** pay component was approved and processed with the effective date of **1/10/2022**.

					HR Administra	ation	
Work Location Job	Information Job L	abor <u>P</u> ayroll	Salary Plan	Compensation			
Kaylani Oleary Employee			Empl IE Empl Record) 00219546 I 0			
Compensation Details	Ð					QI	€
Eff Effective Pa	lective Date 01/10/20 e Sequence 0 HR Status Active yroll Status Active	22			Action Pay Rate Ch Reason Components	ange of Pay	Go To Row
Compe	ation @	2,876.04	USD		Frequen	су В В	iweekly
Chang	e Amount e Percent	131.940000 USE 4.808	D Biweekly Compa-Ratio	0 1.12			
▶ Pay Rates ⑦ Default Pay Com Pay Components ⑦	ponents				Contract Change Prorat	e Option	
III Q	Changes	Conversion				14	
Rate Code	Seq Comp F	late	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	2,674.100000,	USD	в			
2 PRCHCT	0	131.940000	USD	в			
3 PRMPAY	0	70.000000	USD	в			
Calculate Compe	ensation						
Job Data E	Employment Data	Earnings Dis	stribution	Benefits Prog	ram Participation	Creditable Adjus	sted Dates

End of Review Salary Changes via Job Data Process.



Lesson 6: Submitting HR Salary Changes

Lesson Summary

Now that you have completed the lesson, you should be able to:

Request Merit Increase for Salary Grade Employee



- Request Merit Increase for Salary Step Employee
- Request Component of Pay
- Request License/Certification



Lesson 7: At the conclusion of this lesson, you will be able to:

Overview

• Reviewing Employee's Paycheck for a specific pay period

Lesson 7: Payroll

Lesson 7: Introduction



Key Terms

The following key terms are used in this module:

Term	Definition
Pay Calendar	Pay calendars are used to schedule payroll cycles for pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements including employee type, pay frequency, or same country location. A pay group consolidates a set of employees within a company for payroll processing.
Pay Run IDs	Pay Run IDs enables payroll processes to be run for each pay calendar. A pay run ID must be created for each "run" and attached to a pay calendar at the beginning of a new year.
Earnings Codes	An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.
Deduction Codes	In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. INFORMS calculates using different rules depending on the type of deduction selected.



Lecture 1: This lesson will review Define Payroll.

•

Payroll

Review an Employee's Paycheck for a specific pay period.



Lecture 1: Users can review an employee's Paycheck via the Review Paycheck process. There are three pages in reviewing a paycheck such as **Paycheck Earnings, Paycheck Taxes, and Paycheck Deductions**.

NOTE: Users can review an employee's paycheck via the review paycheck page. This page provides a detailed overview of an employee's paycheck.

Navigate to Review Paycheck: Main Menu > Navigator > Human Capital Management (HCM) > Payroll North America > Payroll Processing USA > Produce Payroll > Review Paycheck

- 1. In the Company field, select the appropriate Company.
- 2. In the **Pay Group** field, select from the employee's **specific Pay Group code**.

Listed below is the Pay Group Code chart with a brief explanation of the options.

Pay Group Code	Description	Details
MDC	Miami-Dade General Employees	All County employees
NON	Miami-Dade Non-Employees	Foster Grandparent,
		Service Corps Worker, and
		Senior Companion
CEL	Elections employees	All Constitutional Office
		Elections employees
CSH	Sheriff employees	All Constitutional Office
		Sheriff employees
CCL	Clerk of Courts and Finance	All Constitutional Office
	employees	Clerk of Courts and Finance
		employees
СРА	Property Appraiser employees	All Constitutional Office
		Property Appraiser
		employees
СТС	Tax Collector employees	All Constitutional Office
		Tax Collector employees
RET	Retirees	All Retirees



Lecture 1: Payroll

3. In the **Pay Period End Date** field, enter the **Pay Period End Date**.

- 4. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
- 5. Select Search.

Review Paychec Enter any information yo	k ou have and click	Search. Leave fields blank	: for a list of al	l values.
Find an Existing	Value			
 Search Criteria 				
Company	begins with \mathbf{v}	MDC	Q	
Pay Group	begins with \mathbf{v}	MDC	Q	
Pay Period End Date	= 🗸	05/31/2020	Q	
Off Cycle ?				
Page Nbr	= 🗸		Q	
Line Nbr	= 🗸		Q	
Separate Check Nbr	= 🗸			
Paycheck Number	= 🗸			
Empl ID	begins with 🖌			
Name	begins with 🗸			
□ Case Sensitive				
Search Clear	Basic Search	Save Search Criteria		



Lecture 1: Payroll 6. Select an **individual paycheck** to review by clicking on any link in the desired line.

View All									(- (1 -	100 of 300 🗸 🕨 🕨
Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
MDC	MDC	10/31/2021	N	1	1	0	ADVICE	30969		
MDC	MDC	10/31/2021	N	2	1	0	ADVICE	30970		
MDC	MDC	10/31/2021	N	2	2	0	ADVICE	30971		Sec. And Sec.
MDC	MDC	10/31/2021	N	2	3	0	ADVICE	30972		
MDC	MDC	10/31/2021	N	3	1	0	ADVICE	30976		

Pay Group - Displays the pay group the paycheck was paid under.

Pay Period End Date - Lists the end date of the pay period of the employee's paycheck.

Off-Cycle? - Indicates whether the paycheck was paid as part of regular on-cycle processing (shows as 'N' in this field) or was created as an off-cycle check (shows as 'Y' in this field)

Form Identification - Indicates whether the paycheck was paid as a paper check (CHECK) or went direct deposit (ADVICE). If a check is still in calculated status, or the employee had a confirmed payroll with no earnings on it, this field will show the following value: (blank)

Paycheck Number - Displays the paper paycheck number or advice number associated with each payment. If a check is still in calculated status, or the employee had a confirmed payroll with no earnings on it, this field will show the following value:

Empl ID - Displays the employee's employee ID

Name - Displays the employee's name



Lecture 1: When a user clicks the link to view an employee's paycheck, the user is taken to that paycheck's details. There are multiple tabs within the Review Paycheck page that display different information: Paycheck Earnings, Paycheck Taxes, Paycheck Deductions.

Important fields in this section include:

- **Paycheck Status** This field shows the status of the payment. The following are the most common statuses seen in this field:
 - **Calculated** This status means that the paycheck has not yet been confirmed. This status displays during the payroll processing week.
 - **Confirmed** This status denotes the paycheck you are viewing has been confirmed.
 - **Reversed** This status indicates the paycheck has been reversed, canceling that payment to the employee.
- **Paycheck Option** This field describes the method by which an employee was paid. The following are the most common values seen in this field:
 - Check The employee received a paper check for the payroll
 - Advice The employee received their paycheck via direct deposit for the payroll
 - Check Reversal When a paycheck reversal is completed, the status of the original check changes to "Reversed" and a negative off-setting entry is created in Review Paycheck with the Paycheck Option of "Check Reversal."
 - Manual This paycheck option is only associated with off-cycle paychecks and adjustments. Records created with the paycheck option of "Manual" only update an employee's balances and do not actually pay the employee.
- Issue Date This is the pay date of the paycheck.
- **Paycheck Number** This field displays the paper paycheck number or advice number associated with the payment
- **Off-Cycle** This box is not checked if the paycheck was processed as part of the regular, on-cycle payroll process. This box will be checked if the paycheck was processed as a non-standard off-cycle check.
- **Cashed** This box is checked when the bank notifies us that the employee cashed their paper check. This field only applies to hard copy paper checks.
- Earnings This is the gross amount paid to an employee on their paycheck.
- **Taxes** This is the sum of all taxes deducted from an employee's paycheck.
- **Deductions** This is the sum of all non-tax-related deductions taken from an employee's paycheck.
- Net Pay This is the amount an employee actually receives.





Lecture 1: Payroll

1. Select the drop-down arrow of Page 1 of 2 and select 2 of 2.

Page 2 of 2 displays pay week Begin Date 5/25/2020 and End Date 5/31/2020 with the details of Paycheck Totals, Other Earnings, and Special Accumulators for the second week of the pay period.

Paycheck Earnings				Review
Paycheck Earnings Paycheck Taxes F	aycheck Deductions			
Empl ID 00216718 Name Kennec Company MDC Pay Group MDC	y,Matthew L Pay Period End 05,	/31/2020 Page 126	Line 7 Se	parate Check
aycheck Information Paycheck Status Confirmed Issue Date 06/05/2020 Off Cycle Reprint Adjustr	Paycheck Option Advice Paycheck Number 3521 nent Corrected	Cashed	Earnings 4,228.10 Taxes -2,416.20 Deductions 186.76 Net Pay 6,457.54	
Earnings			Q 4 4 2 of	2 🗸 🕨 🕨 View All
Begin Date 05/25/2020 End Empl Record 0 P	Date 05/31/2020 enefit Record 0	Addl Line Nbr 3	Reason Not Specified Additiona	I Data
Salaried	Hourly		Overtime	
Hours 0.00 Rate 44.042769 Earnings 0.00	Hours 0.00 Rate 0.000 Earnings 0.00 Rate Code	0000	Hours 0.00 Rate 0.000000 Earnings 0.00 Rate Code	
State FL Rate Used Hourly Rate Shift Not Applicable	Locality Shift Rate			
Other Earnings				
Q Other Earnings Details 1 Other Earnings E	etails 2 »		1-1 of 1 🗸	View All
Code Description	Rate Used	Hours R	ate Amount So	urce
REG Regular Hours Pay	Hourly Rate	48.00 44.042	2,114.05	
Special Accumulators				
			l€ € 1-1 c	of 1 🗸 🕨 🕨 🕴 View All
ode Description		Hours	Earnings	Empl Record
RS Reserved for Gross Wages		96.0	0 4,228.10	0
Return to Search Notify //check Earnings Paycheck Taxes Paycheck Dec	luctions			

Lecture 1: Payroll

The **Paycheck Taxes** tab displays a breakdown of the federal and state tax amounts that were withheld from an employee's paycheck. It displays the taxable gross on which the tax withholdings were calculated. The Tax Entity column defines whether the type of tax withheld is for the Federal Government or State. The Tax Class column lists the different types of taxes withheld:

Federal MED/EE - Employee paid Medicare tax (MICA)

Federal Med/ER – Employer-paid Medicare tax (not withheld from the employee's pay) (MICA)

Federal OASDI/EE - Employee paid Social Security tax (FICA)

Federal OASDI/ER - Employer paid Social Security tax (not withheld from the employee's pay) (FICA)

Federal Withholding - Federal withholding tax

State Withholding - State withholding tax (if applicable)

- 1. Select Paycheck Taxes tab.
- 2. Select **Tax Details 1** tab to see the taxes for the pay period.

	Earnings					
Pay <u>c</u> heck	Earnings Payo	check Taxes Pay	check <u>D</u> eductions			
Empl I Compar	D 00216718 IV MDC	Name Kenner Pay Group FRE	dy,Matthew L Pay Period En	d 05/31/2020 Page	126 Line 7	Separate Chec
Paycheck In F	nformation Paycheck Status C Issue Date 0 Ie Repri	Confirmed 6/05/2020 nt Adjustme	Paycheck Option Advi Paycheck Number 3521 ent Corrected	Cee Cashed	check Totals Earnings 4,228 Taxes -2,416 Deductions 186 Net Pay 6,457	3.10 3.20 3.76 7.54
Taxes Q Tax Detai ax Entity	Is 1 Tax Det <u>ails</u> Resident	s 2 Tax Tip <u>s</u>	Locality Name	Tax Class	I ▲ 1-5 of 5 ❤	► ► View All
Taxes Q Tax Detai x Entity	Tax Det <u>a</u> its	s 2 Tax Tipş Locality	Locality Name	Tax Class MED/EE	Id 4 1-5 of 5 ∨ Taxable Gross 4,101.26	Tax Amount -594.74
Taxes Q Tax Detain Ix Entity S Ideral S Ideral	is 1 Tax Details Resident	a 2 Tax Tip <u>s</u> Locality	Locality Name	Tax Class MED/EE Med/ER	Id 4 1.5 of 5 v Taxable Gross 4,101.26 4,101.26 4,101.26	► ► View All Tax Amount -594.74 -594.74
Taxes Q Tax Detai ax Entity S sederal S soleral S soleral	Resident	s 2 Tax Tips III Locality	Locality Name	Tax Class MED/EE Med/ER OASDI/EE	Image: A state of the state of th	View All Tax Amount -594.74 -594.74 -2,542.97
Taxes Tax Detail ax Entity S ederal S ederal S sderal	Is 1 Tax Details Resident	s 2 Tax Tip <u>s</u>) Locality	Coality Name Locality Name	Tax Class MED/EE Med/ER OASDI/EE OASDI/ER	Image: Second	▶ I View All Tax Amount -594.74 -594.74 -2,542.97 -2,542.97



Lecture 1: Payroll

- 3. Select the **Paycheck Deductions** tab.
- 4. Select the **Deduction Details 1** tab to view the employee's deductions for the pay period.
- 5. Select the **Garnishment** arrow to view the general deductions.

Paycheck Earnings Pri Empl ID 00216718 Company MDC Paycheck Information Paycheck Status Issue Date Off Cycle Rep	aycheck Jaxes Paycheck Name Kennedy,M Pay Group FRE Confirmed 06/05/2020 print Adjustment	Atthew L Pay Per Paycheck Optio	iod End	05/31/2020 F					
Empl ID 00216718 Company MDC Paycheck Information Paycheck Status Issue Date Off Cycle Reg	Name Kennedy,N Pay Group FRE Confirmed 06/05/2020 print Adjustment	Aatthew L Pay Per Paycheck Optio	iod End	05/31/2020 F					
Paycheck Status Issue Date	Confirmed 06/05/2020 print Adjustment	Paycheck Optio			Page 126 Paycheck Te	Line otals	7	Separate Check	
		Paycheck Numbe	n Advice er 3521 ected	Cashed	Ea Dedi	rnings Taxes ictions let Pay	4,228.10 -2,416.20 186.76 6,457.54		
Deductions					14	< [1-8 of 9 💙 🕨	▶ View All	
Deduction Details 1	Deduction Details 2 De	duction Details 3	⊪						_
duction Code De	escription		Class		Ar	nount	c	alculated Base	
FFLF D	CFF Basic Life Ins Trust		Nontaxabl	e Benefit		8.90		109,930.75	
DIS SF	hort-Term Disability Insuranc		After-Tax			3.80		259.99	
S FF	RS Contribution		Before-Tax	r .		126.84		4,228.10	
S FF	RS Contribution		Nontaxabl	e Benefit	1	035.88		4,228.10	
1403 Fi	refighters Union Local 1403		After-Tax			38.94			
CHAR Fi	refighters Charities		After-Tax			4.00			
PAC Fi	repac		After-Tax			5.00			
E5X M	innesota Opt Life (5X)		After-Tax			7.75			
Garnishments									-
Net Pay Distribution					4 4	1-1 0	f1 v 🕨 🕅	View All	
heck/Advice Number	Account Type	Bank ID		Account Number				Amount	
521	Checking	87654321		XXXX5678				6,457.54	
Return to Search Notif	ſv								

NOTE: Garnishments section displays court related deductions such as Child Support.

Garnishments		Q	1 of 1 - View All
Priority 1 ID Vendor GARNISH-001	GRN191	Type AP Status	Tax Levy
Law Source \$U		Rule ID	LEVY/S Tax Levy/Single
Disposable Earnings	2,364.32	Proration Rule ID	
Less Exemption	482.69		
Less Other Garnishments			
Maximum Deduction	1,881.63		
Limited Amount	1,881.63	Limited Type	Deduct Not Limited
Garnishment Amount	1,881.63		
Company Fee			
Payee Fee			
Total Deducted	1,881.63	Adjusted Due To Includ	ed Fee



Lecture 1:The Paycheck Deductions Details 2 tab displays the detailed deductions/contributions such
as benefits plan and plan type.

() Paycheck Earnings									
Paycheck Earnings	Paycheck Taxes	Payche	ck Deductions						
Empl ID 00216718 Company MDC Paycheck Information	8 Name Pay Group	Kennedy,N FRE	<u>fatthew L</u> Pay I	Period End	05/31/2020 P	age 126 Pavcheck Te	Line otals	7	Separate Checl
Paycheck Stat Issue Di Off Cycle	tus Confirmed ate 06/05/2020 Reprint A	l djustment	Paycheck Opt Paycheck Num	ion Advic ber 3521 rrected	e	Dedi	arnings Taxes uctions Net Pay	4,228.10 -2,416.20 186.76 6,457.54	
^r Deductions ■ Q								1-8 of 9 🗸 🛛	View All
Deduction Details 1	Deduction Details	2 Dec	duction Details	• ⊪					
Deduction Code	Plan	Benefit R	ecord Pla	п Туре		N	ot Taken	Reason	
DCFFLF	FLIFE	0	Life						
TDIS	STDHGH	0	Sho	rt-Term Dis	ability				
RS	нв	0	Flor	ida Retirem	ent System				
RS	нв	0	Flor	ida Retirem	ent System				
F1403		999	Ger	General Deduction					
FCHAR		999	Ger	eral Deduc	tion				
RPAC		999	Ger	eral Deduc	tion				
JFE5X		999	Ger	eral Deduc	tion				
Garnishments									
Net Pay Distribution									
III Q							1-1 of	1 🕶 🕩 👘	View All
	Account Type		Bank ID		Account Number				Amount
Check/Advice Number									

Note: Constitutional Office employees can receive multiple paychecks and/or W2's if they received retroactive payments from Miami-Dade County or another Constitutional Office.



Lecture 2: Print Paycheck Navigate to Review Self Service Paycheck: Payroll for North America > Payroll

Processing USA > Produce Payroll > Review Self Service Paycheck

- 1. Select the Company, Pay Group, and Empl ID and select Search.
- 2. Select the **Employee Record** from the **Search Results**.

rillu a	n Existing Value	
earch	Criteria	
ompany	begins with V	Q
ay Group	begins with v	٩
Empl ID	begins with v 004008	173
Name	begins with v	
Case Se Search	nsitive Clear Basic Search E	🖉 Save Search Criteria
al off i tot	1 1-1 of 1 v	
ew All		
ew All	Pay Group Empl ID Name	

3. Select View Paycheck under the View Self Service Paycheck section.

View Self Service Paycheck								
Christina Cresp	<u>Christina Crespi</u>							
 Select Pay 	check							
m; Q						1-2 of 2 v	▶ View All	
Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File	
12/03/2021	View Paycheck	Miami Dade County	11/15/2021	11/28/2021	\$1135.97	60372		
11/19/2021	View Paycheck	Miami Dade County	11/01/2021	11/14/2021	\$1319.22	62254		
Return to Se	earch							



Lecture 2: Print4. The employee's paycheck will be available to view. The DPR can print or save the
paycheck as a PDF document.

Miami Dade County 111 NW 1st Street, Ste 2630 Miami, FL 33128-1995		Pay (Pay) Pay)	Group: N Begin Date: 1 End Date: 1	/IDC-General Emj 1/15/2021 1/28/2021	ployees			Business Unit: Advice #: Advice Date:	PH 00000000060372 12/03/2021	
								TAX DATA:	Federal	FL State
Christina Crespi	Employ	ee ID:	00400873					Tax Status:	Single	N/A
112 NW Second Street	Departm	ient:	PH08100000-N	EWBERG WAR	EHOUSE			Allowances	N/A	0
Miami FL 33128	Location	n:	OPEN LAND/	VACANT LOT/C	ANAL			Addl Deserts	37/4	
	Job Title	e:	Electrician					Addi. Percent.	INA	
	Pay Rat	e:	\$1,900.70 Biwe	ekly				Addi. Amount:		
	НО	URS AN	D EARNINGS						TAXES	
			Current			YTD				
Description		R	ate Hours	Earnings	Hours		Earnings	Description	Current	YTD
AdminHrs		23 7587	750 40.00	950.35	84.00		1 005 74	Fed Withholdng	155.66	370.60
AdminHrs		23 7587	750 24.00	570.21	01.00		0.00	Fed MED/EE	27.56	60.45
Woliday		22 7597	750 16.00	390.14	24.00		570.21	Fed OASDI/EE	117.84	258.46
Car Allowa		100.100	10.00	0.00	24.00		100.00			
Night Diff				0.00	16.00		17.02			
Night Dill				0.00	7.00		240.47			
Deruher He				0.00	62.00		1 225 46			
Kegular Ho			80.00	1,000,70	52.00		1,255.40	TOTAL	201.05	690 51
IUIAL:			30.00	1,900.70	183.00		4,108.71	IOTAL:	301.00	039.51
BEFORE-	TAX DEDUCTIONS			AFTER-TAX	DEDUCTIO	NS		E	MPLOYER PAID BENEFITS	
Description	Current	YTD	Description		Curre	nt	YTD	Description	Current	VTD
FRS Contribution	57.02	122.06	GARNChild (Ar	(trunc	50	00	100.00	Medical Select Inco	manco Blan 510.22	1 029 46
The control of	57.02	122.00	GARNChild (Co	(Fee)	2	00	4 00	Regic Life Insurance		1,038.40
			GARN-Ter Lorg		250	40	672.70	EDS Contribution		440.04
			GARNWrit (Am	ount)	81	25	81.25	FRS Conditionion	205.00	440.24
			GARNIWrit (Co	Fool	2	00	2.00			
			Gout Supervisor	Assoc Dues	21	00	42.00			
TOTAL:	57.02	122.06	TOTAL:	Assoc Dues	406	.65	901.95	*TAXABLE		
	TOTAL GROSS	FEI	TAXABLE GR	OSS	тот	AL TA	XES	TOTAL DE	DUCTIONS	NET PAY
VTD	1,900.70		1,84	5.08		50	1.00		403.07	1,135.97
YID	4,108./1		4,04	0.00		08	9.51		1,024.01	2,455.19
				NET PAY DI	STRIBUTIO	DN .				
Advice #0000000006037	2 Cheo	king	<u>e</u>		XXXXXX67	89		5	00.00	
	Cheo	king:			XXXXXX	XXX60	75	6	35.97	
TOTAL								1	135.07	
MESSAGE:					1				,100.91	
	Please consider the environment before printing your paystut		Mission Statemen Delivering excelle	t: ent public services	that address	our com	munity's nee	ds and enhance our q	uality of life, now and in the futur	e."



Lesson Summary

- Now that you have completed the lesson, you should be able to:
- Reviewing Employee's Paycheck for a specific pay period





Lesson 8: At the conclusion of this lesson, you will be able to:

Overview

• Review and Approve License/Certification Requests







LEI

The following key terms are used in this module:

Term	Definition
N/A	N/A



Lecture 1: Approvals (License/ Certifications)

The Department Personnel Representative (DPR) is responsible for approving various transactions. One of the approvals related to guide is the Employee's Profile License/Certification Request.

Navigate to Approvals: Approvals

The number on the bottom right side of the Approvals icon indicates how many items are pending approval.



1. Select the Licenses and Certifications request.

K HOME			Pending Approvals	🐔 Q, 🗙 🚦	MEMU
View By Type	*	Ŧ			
ai	3	All		3 rows	/s
Person Profile	3	Person Profile Devaughn Liang	Profile Type: Person Licenses and Certifications(1)	Routed > 01/20/2022	
		Person Profile Kilvondra Stocker	Profile Type: Person Degrees(1)	Routed > 02/18/2022	
		Person Profile Kilvondra Stocker	Profile Type: Person Licenses and Certifications(1)	Routed > 02/18/2022	·



Lecture 1: Approvals (License/ Certifications)

Upon selecting, the **Person Profile** page will be displayed.

- 2. Select the **Profile Item Changes Content Item** to view the request before
- approving.

C Pending Approvals	Person Profile	*	Q 🥥	MEMU
Kilvondra Stocker				
Hr Business Systems Section Cf			Approve	Deny
🏥 In Process				
Person Profile Information				
	Emplid 00124506			
Р	rofile Type Person			
Profile Item Changes				
Content Type	Content Item	Disposition		
Licenses and Certifications	Profess Human Resources Cert	Add		>
Approver Comments				
Approval Chain				

3. Select Approve.

C Pending Approvals	Person Profile	A 🗨	
Kilvondra Stocker			
Hr Business Systems Section Cf		Approve	Deny
Person Profile Information			
	Emplid 00124506		
	Profile Type Person		
Profile Item Changes			
Content Type	Content Item	Disposition	
Licenses and Certifications	Profess Human Resources Cert	Add	>
Approver Comments	>		

4. Select Submit.

Emplid 00	0124506			
emplia of	You are abo	Approve ut to approve this request. omments	Submit	
>				



Lecture 1: Approvals (License/ Certifications)

The pending and approved License and Certifications can be found on the **Manage Employee Profile** section.

Navigate to Manage Employee Profile: Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile

C Human Resources (HCM)				н	R Administ	ration					1	ñ	ñ 9	ñ 🔍
Sob Information	^	Person Pro	ofile						New	Window	Help		Pen	Person
Job Data			Empl ID 001245	06 <u>K</u>	ilvondra Stocke	er								
Workforce Job Summary			Profile Type PERSC *Profile Status Active	N P	erson									
Manage Employee Profile			*Description Shane	lissessar										
Neadcount	~	Print 🕫 Co	omments		Deef		[Select Acti	on]	▼ ⑧					
🕹 Labor Administration	~				Profi	le Actions								
R Configuration	~	▼ Approval	S											
		✓ 1 item((s) approved (since 09/2)	//2021)										
		Education	Qualifications	Veterans' Prefere	ence Addit	ional Informat	ion M	DC Blue Book						
			addimeditionity		, 100									
		▼ Degrees						M	∨	View A	Ш			
		ID	Degree			Major Code			Attachments	;				
		BS	Bachelor of Science			Public Admir	nistration		P	Û				
		HSD	High School Diploma						P	Û				

Note: Recently approved items will appear with a green check icon. Pending approvals will appear with a clock icon.



Lesson Summary

- Now that you have completed the lesson, you should be able to:
 - Review and Approve License/Certification Requests





	Lesson 9: Reports and Queries
Lesson 9:	At the conclusion of this lesson, you will be able to:
Overview	Understand the list of Reports:
	o RPT-HR-508: Combo Code Summary
	 RPT-HR-573: Safe Driving Award
	 RPT-HR-530: Active and LOA Employee Counts by Business Unit

• **RPT-HR-536:** Overtime and Earning Code, Detail Report



Lesson 9: Reports and Queries



LEI

The following key terms are used in this Lesson.

Term	Definition
N/A	N/A



Lesson 9: Reports and Queries

Lecture 1: Reports and Queries

The following reports and queries are available for the Department Personnel Representative (DPR) to run in INFORMS.

Refer to **HCM 101: Human Resources Fundamentals** to gain step by step instructions to run the following:

Report Name	Description
Safe Driving Award	Used to obtain Departmental Employees with Safe Driving Award with Amount and Pay Period Date
Combo Code Summary	Used to obtain Departmental Combination Codes for Position Budget Funding related to Position Management
Active and LOA Employee Counts by Business Unit	Used to obtain active and leave of absence employee counts
Overtime and Earning Code, Detail Report	Used to obtain overtime and earning code details

Lesson 9: Lesson Summary

Objectives Achieved

- Now that you have completed the Report and Queries lesson, you should be able to:
- Achieved
- Understand the list of Reports:



- **RPT-HR-508:** Combo Code Summary
- o **RPT-HR-573:** Safe Driving Award
- o **RPT-HR-530:** Active and LOA Employee Counts by Business Unit
- **RPT-HR-536:** Overtime and Earning Code, Detail Report

Module 3: Guide Summary Objectives You have completed the Personnel Changes guide. You now should be able to: Achieved Submit Job Change Position Management Position Management Define Department/Position Budget Data Submitting position change Submitt Job Data Changes that impact benefits

- Submitting HR Transactions
- Submitting HR Salary Changes
- Workflow Approvals
- Reports and Queries

	Module 3: Guide Summary
Additional	Other training materials, related to this topic, include:
Training and Job Aids	 DPR 303 - Time Management DPR 304 - Updating Team Information DPR 321 - Recruitment
	You also have the following resources available to you:
	Job Aids
	Budget Funding
	Budget Incumbent
	Paycheck Overview Job Aid
	Approve a Job Opening or Position Opening in HR Compensation
	Approve a Job Opening or Position Opening in OMB
	Approve a Job Opening or Position Opening in HR Recruitment
	Approve a Job Opening or Position Opening as a CO Budget Administrator
	For additional information, be sure to visit:
	Miamidade.gov/informs



Glossary

Key Terms



The following key terms are used in this guide:

Term	Definition
Combination Code	A key that defines a combination of ChartFields needed for Position Budget Funding.
Components of Pay	Additional elements of pay added to the employee's compensation. Components can be added or removed based on operational need.
Deduction Codes	In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. INFORMS calculates using different rules depending on the type of deduction selected.
Earnings Codes	An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.
Full-Time Equivalent (FTE)	A unit that indicates the workload of an employed person. FTEs are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.
Job Code	Contains the classification's information such as title, salary plan and grade, bargaining unit, and job description.
Pay Calendar	Pay calendars are used to schedule payroll cycles for pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements including employee type, pay frequency, or same country location. A pay group consolidates a set of employees within a company for payroll processing.
Pay Run IDs	Pay Run IDs enables payroll processes to be run for each pay calendar. A pay run ID must be created for each "run" and attached to a pay calendar at the beginning of a new year.
Position Data	Details related to a position such as Position Information, Job Information, Work Location, and Salary Plan Information
Top of Stack	When the position effective date is equal to or greater than a Job's effective date, INFORMS automatically updates the Job record once approved.


Module 3: Summary

New Terms A glossary of new INFORMS terminology is provided for reference.

New Term	Definition
Company	A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets.
Historical Row	Position effective date lands in between Job effective dates, position row will not be added. The Job record must be manually updated by the HR Position Administrator.