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## **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.

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

## Module 1: Introduction

### Learning Objectives

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

- 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 related business processes
- 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.

## Module 1: Introduction

### Purpose and Benefits

The purpose and benefits of the Departmental Human Resources Personnel Changes business 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:

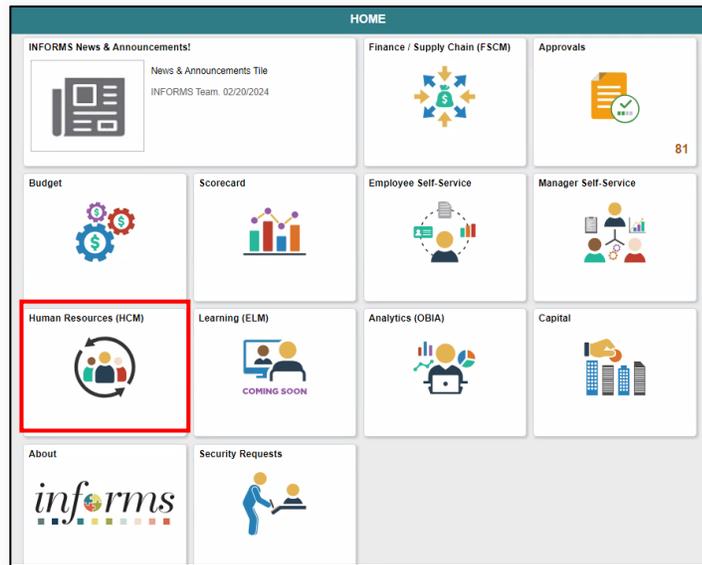
- Positions need to be approved before changes take effect on employee's data
- Positions need to be approved before they can be attached to job opening

# Module 1: Introduction

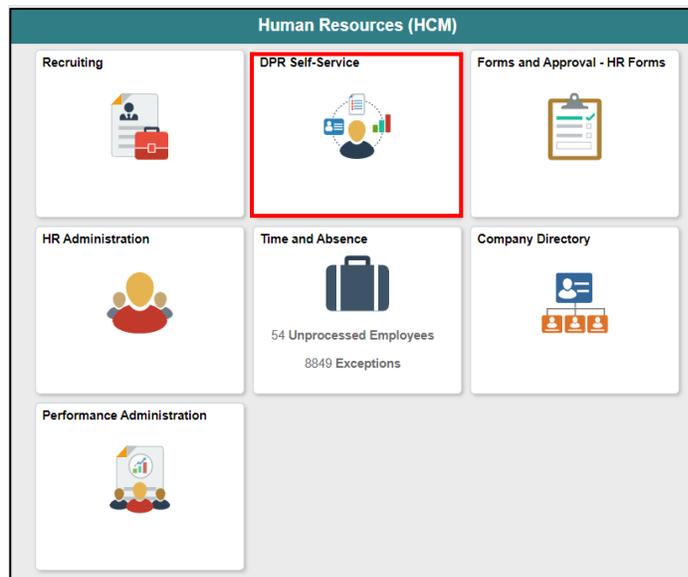
## Navigation

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-Service**. 1. Login to INFORMS and select **Human Resources (HCM)** from the home landing page below.



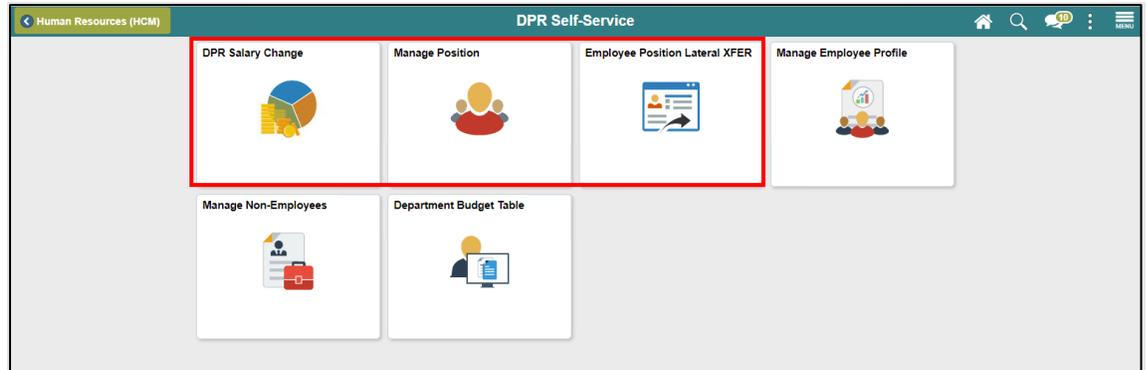
2. Select **DPR Self-Service**.



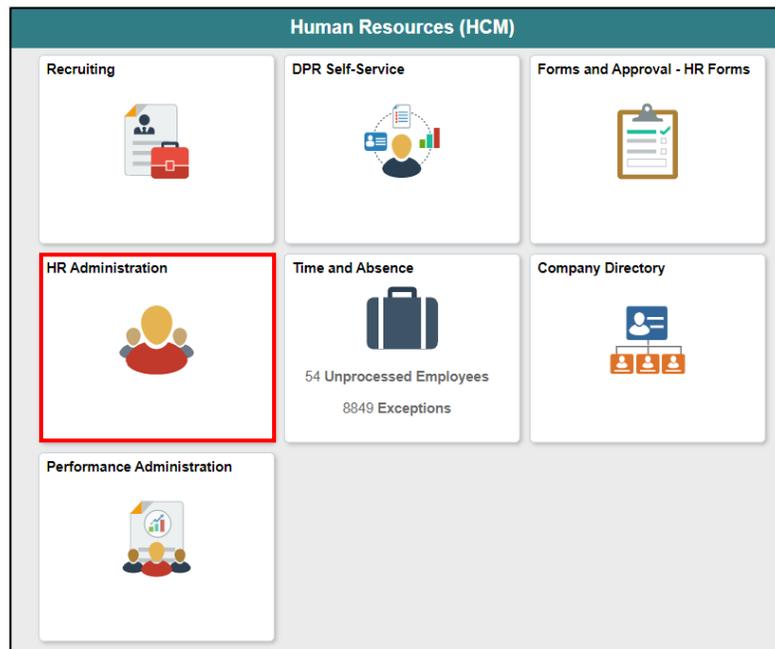
# Module 1: Introduction

## Navigation

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

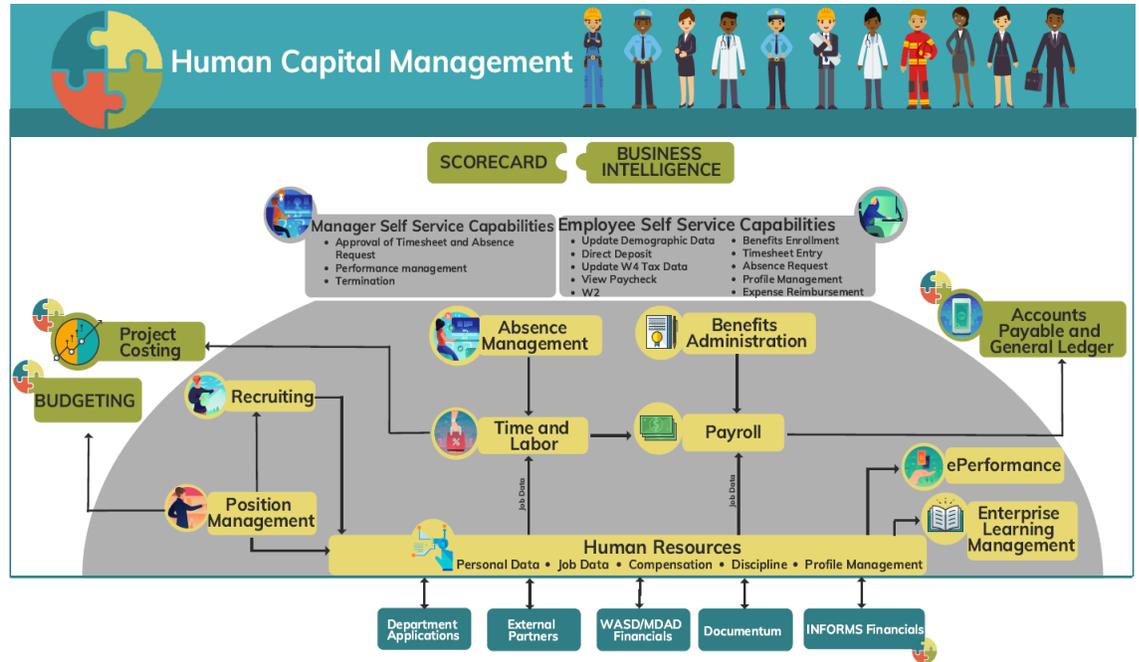


Navigation for Job Data: **Human Resources (HCM) > HR Administration**



# Module 1: Introduction

## The End-to-End Business Process



## Module 1: Introduction

### Module 1: Introduction Summary

The following key concepts were covered in this module:

- Learning Objectives
- 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  
Summary**

- 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

## Lesson 1: Position Management

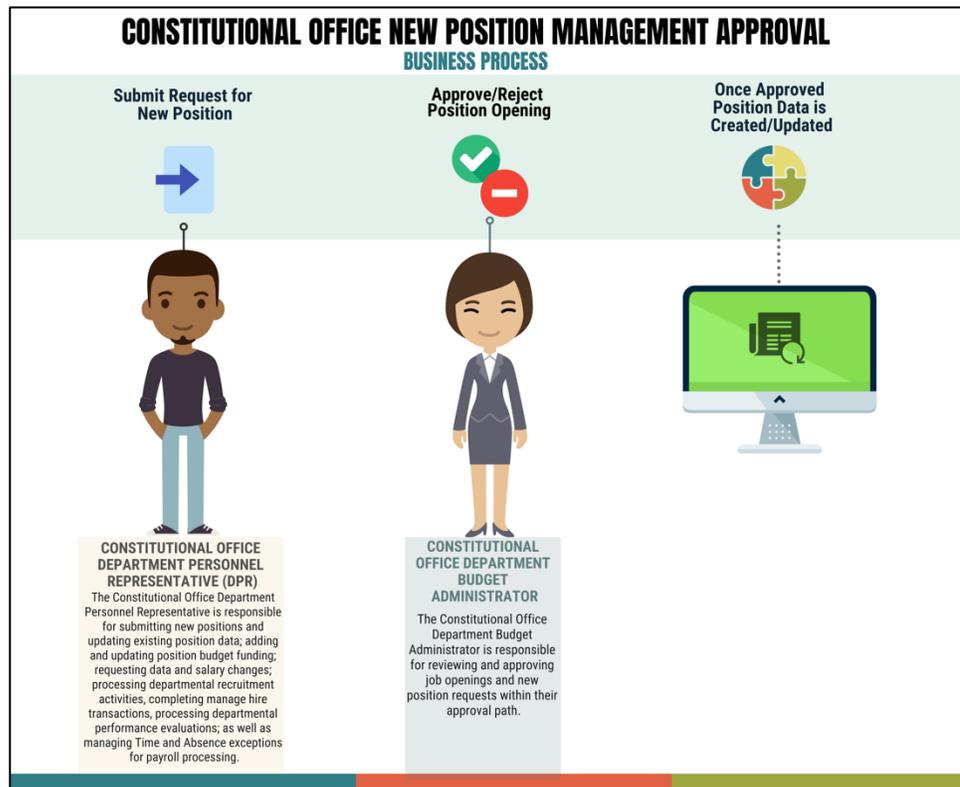
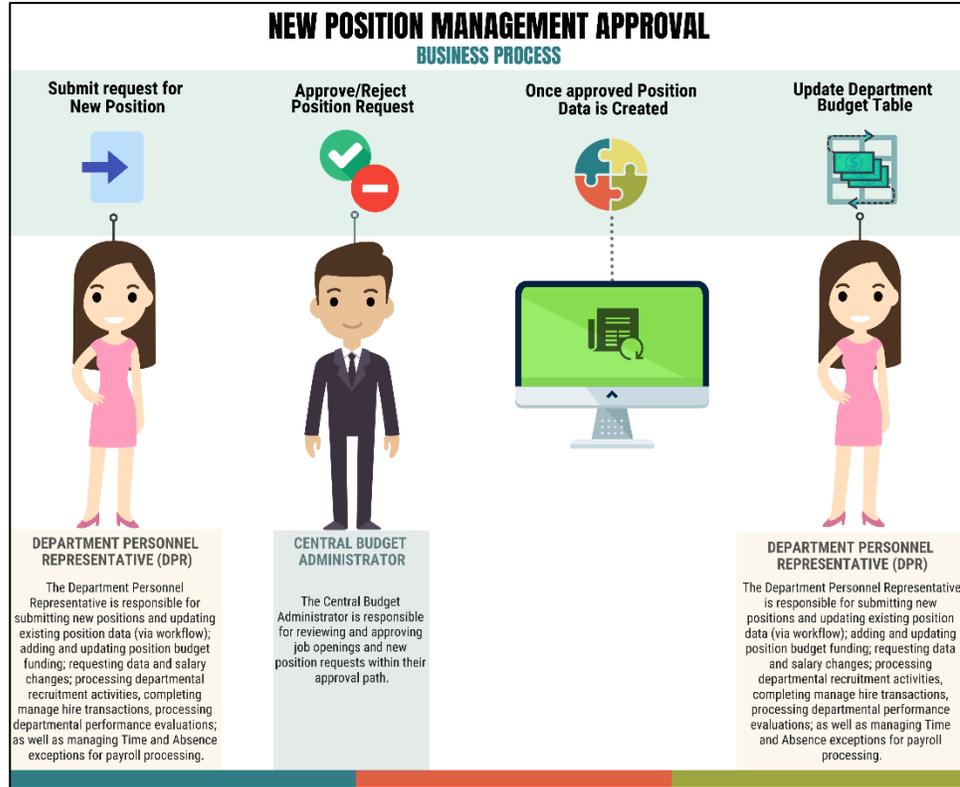
### Lesson 1: Overview

At the conclusion of this lesson, you will 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 1: Position Management

## Lesson 1: Introduction



## Lesson 1: Position Management

### 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
  - 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

### Lesson 1: Introduction

#### 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)

## Lesson 1: Position Management

### Key Terms



The following key terms are used in this module:

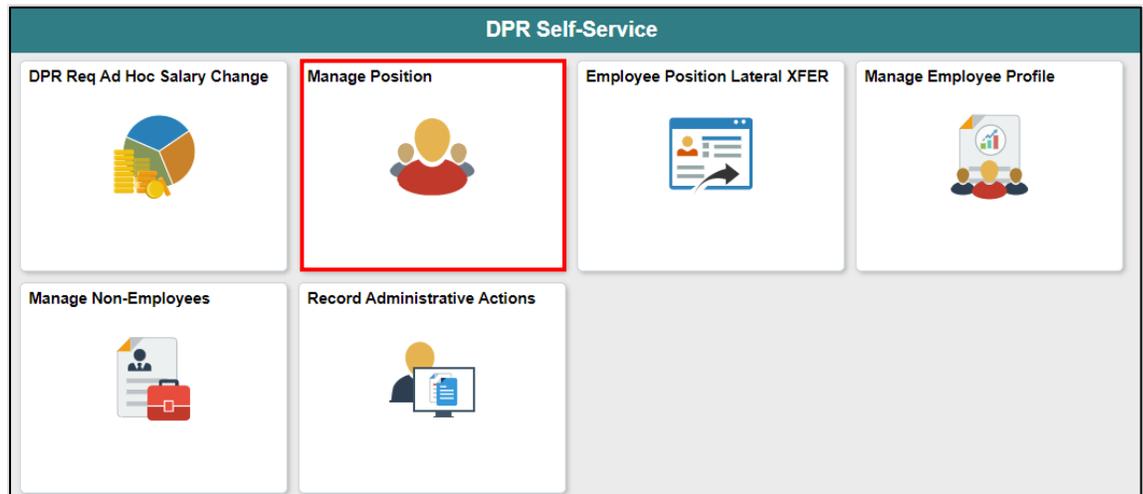
Term	Definition
<b>Full-Time Equivalent (FTE)</b>	A unit that indicates the workload of an employed person. FTEs are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.
<b>Job Code</b>	Contains the classification's title, salary plan and grade, bargaining unit, and job description.
<b>Position Data</b>	Details related to a position including Position Information, Job Information, Work Location, and Salary Plan Information.
<b>Company</b>	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.

## Lesson 1: Position Management

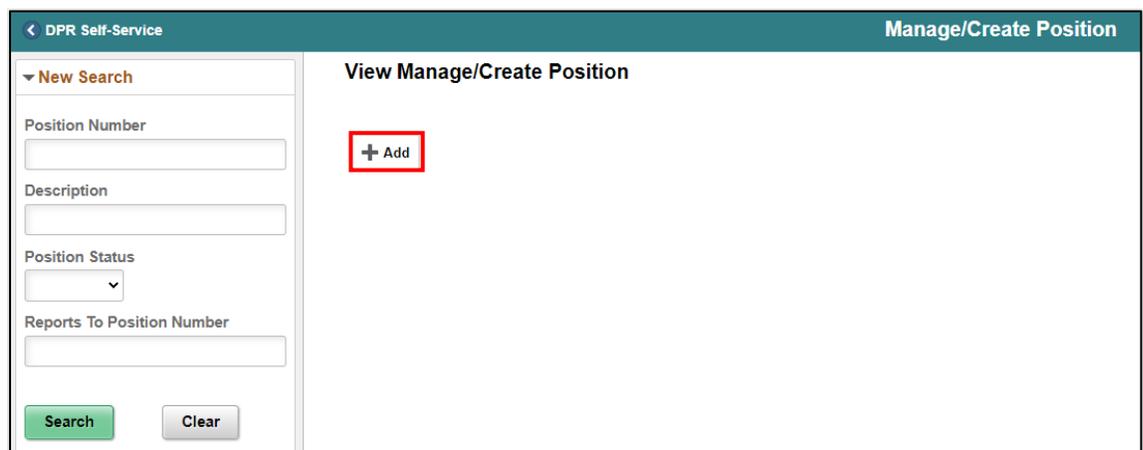
### Lecture 1: Create New Position

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.



**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**.



## Lesson 1: Position Management

### Lecture 1: Create New Position

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 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

Effective Sequence 0

Reason Code NEW New Position

Approval Status Not Available

**Position Information**

\*Filed Status

\*Status

Budgeted Position  Yes  No

Senior Management  No

Max Head Count

Non-Mayoral  No

## Lesson 1: Position Management

### Lecture 1: Create New Position

In the **Job Information** section, users select the following:

7. The **\*Business Unit** field is default by security.
8. In the **Full/Part Time** field, select **Full-Time** or **Part-Time** depending on the position.
9. 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 Information	
*Business Unit	PR <input type="text"/> Parks, Recreation & Open Spcs
*Job Code	000459 <input type="text"/> Hris Technician
*Regular/Temporary	Regular <input type="text"/>
*Regular Shift	Not Applicable <input type="text"/>
*Title	Hris Technician <input type="text"/>
*Full/Part Time	Full-Time <input type="text"/>
Union Code	H <input type="text"/> Local199 - General Employees
Short Title	Hris Tech <input type="text"/>
Description	Hris Technician <input type="text"/>

## **Lesson 1: Position Management**

**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.

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

Supervisor Level	Description
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

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

**Work Location**

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;"><b>*Reg Region</b></td> <td style="width: 30%;"><input type="text" value="USA"/></td> <td style="width: 10%; text-align: center;">Q</td> <td style="width: 39%;">United States</td> </tr> <tr> <td><b>*Department</b></td> <td><input type="text" value="PR08000000"/></td> <td style="text-align: center;">Q</td> <td>HUMAN RESOURCES</td> </tr> <tr> <td>Location</td> <td><input type="text" value="PR00000001"/></td> <td style="text-align: center;">Q</td> <td>1451 NW 67TH ST</td> </tr> <tr> <td>Reports To</td> <td><input type="text" value="00010781"/></td> <td style="text-align: center;">Q</td> <td>HUMAN RESOURCES MANAGER</td> </tr> </table>	<b>*Reg Region</b>	<input type="text" value="USA"/>	Q	United States	<b>*Department</b>	<input type="text" value="PR08000000"/>	Q	HUMAN RESOURCES	Location	<input type="text" value="PR00000001"/>	Q	1451 NW 67TH ST	Reports To	<input type="text" value="00010781"/>	Q	HUMAN RESOURCES MANAGER	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;"><b>*Company</b></td> <td style="width: 30%;"><input type="text" value="MDC"/></td> <td style="width: 10%; text-align: center;">Q</td> <td style="width: 39%;">Miami Dade County</td> </tr> </table>	<b>*Company</b>	<input type="text" value="MDC"/>	Q	Miami Dade County
<b>*Reg Region</b>	<input type="text" value="USA"/>	Q	United States																		
<b>*Department</b>	<input type="text" value="PR08000000"/>	Q	HUMAN RESOURCES																		
Location	<input type="text" value="PR00000001"/>	Q	1451 NW 67TH ST																		
Reports To	<input type="text" value="00010781"/>	Q	HUMAN RESOURCES MANAGER																		
<b>*Company</b>	<input type="text" value="MDC"/>	Q	Miami Dade County																		

[View Current Incumbents](#)

Supervisor Level

## Lesson 1: Position Management

### Lecture 1: Create New Position

16. In the **Salary Plan Information** section, the following fields automatically default from the Job Code:

- **Salary Admin Plan (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 Plan Information**

Salary Admin Plan	<input type="text" value="H"/>	Grade	<input type="text" value="147"/>
Standard Hours	<input type="text" value="80.00"/>	Step	<input type="text"/>
Work Period	<input type="text" value="B"/>	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**.

Exit
Create Position

Position Number: 00000000  
Headcount Status: Open  
Current Head Count: 0

Next >

**Position Data**  
Valid

2 Additional Information  
Not Started

3 Attachments  
Not Started

4 Budget Incompletes  
Not Started

6 Review and Submit  
Not Started

**Step 1 of 5: Position Data**

Effective Date: 12/27/2021  
Employee Sequence: 0

Reason Code: NEW - New Position  
Approval Status: Not Available

**Position Information**

\*Filed Status: Approved ▼  
\*Status: Active ▼  
Budgeted Position:  Yes  No  
Senior Management:  Yes  No

**Job Information**

\*Business Unit: PR Parks, Recreation & Open Spcs  
\*Job Code: 000459 Hrs Technician  
\*Regular/Temporary: Regular ▼  
\*Regular Shift: Not Applicable ▼  
\*Title: Hrs Technician

\*Full/Part Time: Full-Time ▼  
Union Code: H Local199 - General Employees  
Short Title: Hrs Tech  
Description: Hrs Technician

**Work Location**

\*Reg Region: USA United States  
\*Department: PR08000000 HUMAN RESOURCES  
Location: PR00000001 1451 NW 6TH ST  
Reports To: 00010781 HUMAN RESOURCES MANAGER  
Supervisor Level:

**Salary Plan Information**

Salary Admin Plan: H  
Standard Hours: 80.00  
Work Period: B Biweekly

Grade: 147  
Step:

▼ Specific Information  
▼ USA

Updated on: \_\_\_\_\_ Updated By: \_\_\_\_\_

## Lesson 1: Position Management

### Lecture 1: Create New Position

In the **Additional Information** page (Step 2 of 5), the following fields automatically default:

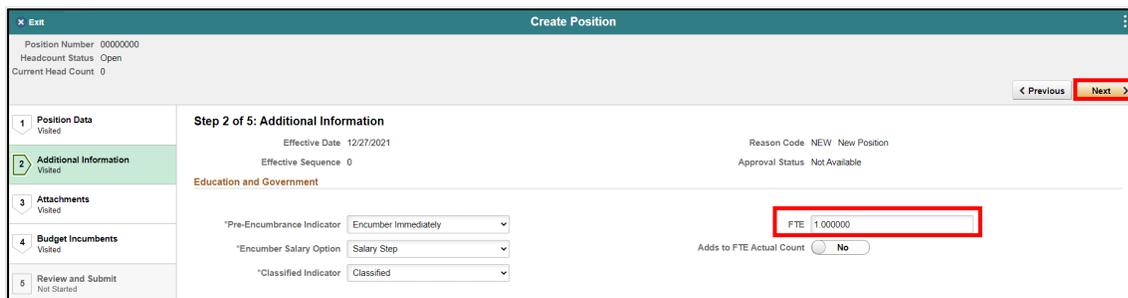
- **\*Pre-Encumbrance Indicator** (Leave as Defaulted)
- **\*Encumber Salary Option** (Leave as Defaulted)
- **\*Classified Indicator** (Leave as Defaulted)

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 Part-time 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**.



The screenshot displays the 'Create Position' form at Step 2 of 5: Additional Information. The form includes a sidebar with navigation steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main content area shows the following details:

- Position Number: 00000000
- Headcount Status: Open
- Current Head Count: 0
- Effective Date: 12/27/2021
- Effective Sequence: 0
- Reason Code: NEW - New Position
- Approval Status: Not Available
- Section: Education and Government
- \*Pre-Encumbrance Indicator: Encumber Immediately
- \*Encumber Salary Option: Salary Step
- \*Classified Indicator: Classified
- FTE: 1.000000 (highlighted with a red box)
- Adds to FTE Actual Count: No

## Lesson 1: Position Management

### Lecture 1: Create New Position

In the **Attachments** page (Step 3 of 5), users add supporting documentation for the new position.

#### 1. Select **Add Attachment**.



The screenshot shows the 'Create Position' form at Step 3 of 5: Attachments. The form includes a progress bar on the left with steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main content area shows 'Step 3 of 5: Attachments' with fields for 'Effective Date' (12/27/2021), 'Effective Sequence' (0), 'Reason Code' (NEW New Position), and 'Approval Status' (Not Available). Below these fields, the text reads 'You have not added any Attachments.' and a red box highlights the 'Add Attachment' button.

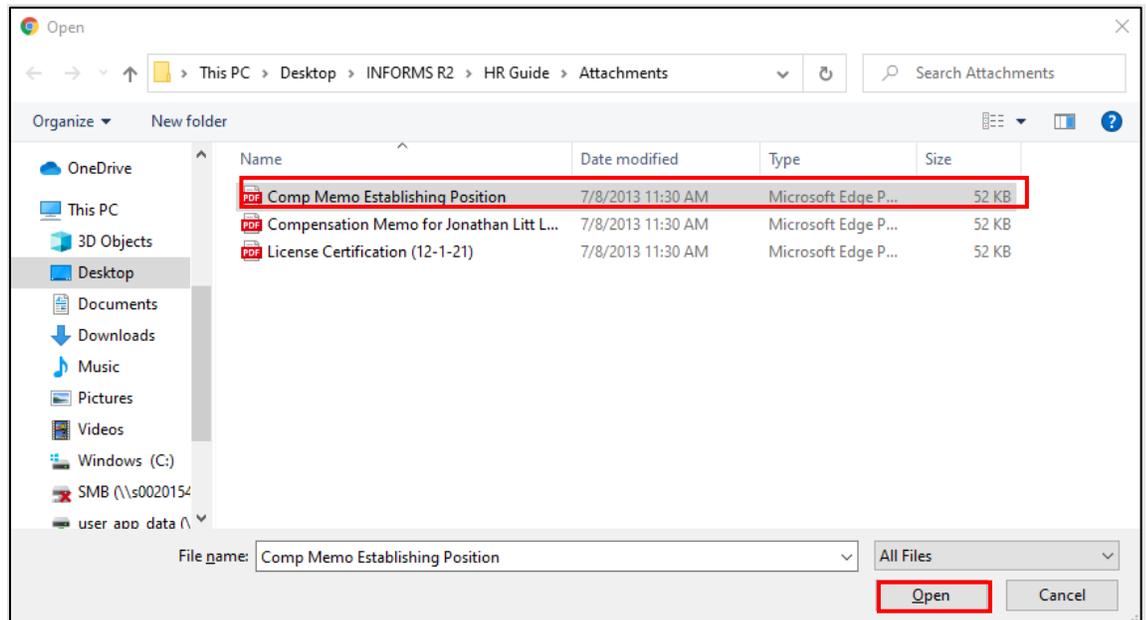
#### 2. Select **My Device**.



The screenshot shows the 'File Attachment' dialog box. It has a title bar 'File Attachment' and a close button. Below the title bar, it says 'Choose From'. There are two options: 'My Device' (with a computer icon) and 'My Recent Files' (with a folder icon). The 'My Device' option is highlighted with a red box.

#### 3. Search and **select the document to attach**.

#### 4. Select **Open**.



The screenshot shows a Windows File Explorer window titled 'Open'. The address bar shows the path: 'This PC > Desktop > INFORMS R2 > HR Guide > Attachments'. The search bar contains 'Search Attachments'. The left sidebar shows the 'Desktop' folder selected. The main pane displays a table of files:

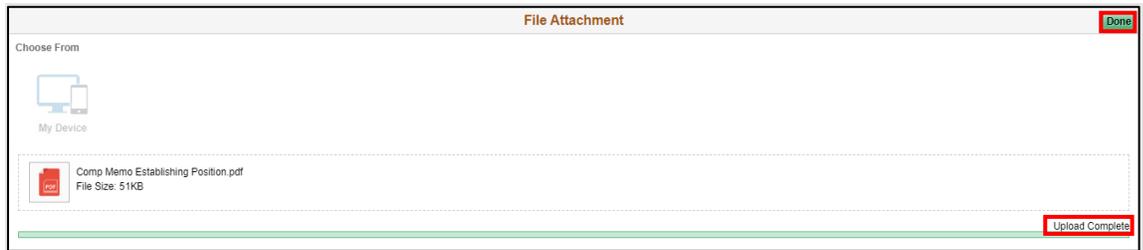
Name	Date modified	Type	Size
 Comp Memo Establishing Position	7/8/2013 11:30 AM	Microsoft Edge P...	52 KB
 Compensation Memo for Jonathan Litt L...	7/8/2013 11:30 AM	Microsoft Edge P...	52 KB
 License Certification (12-1-21)	7/8/2013 11:30 AM	Microsoft Edge P...	52 KB

The first file, 'Comp Memo Establishing Position', is highlighted with a red box. At the bottom of the window, the 'File name' field contains 'Comp Memo Establishing Position' and the file type is set to 'All Files'. The 'Open' button is highlighted with a red box.

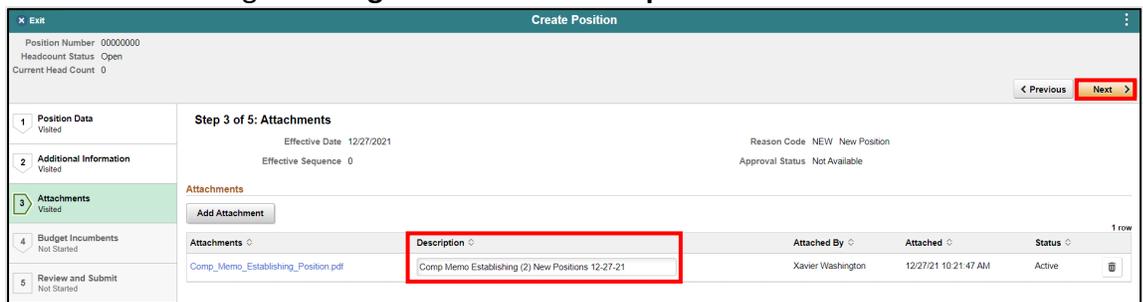
## Lesson 1: Position Management

### Lecture 1: Create New Position

5. Select **Upload**.
6. Select **Done** once the upload is complete.



7. In the **Description** field, enter a **brief description of the documentation**.
8. Select **Next** to go to **Budget Incumbents – Step 4 of 5**.

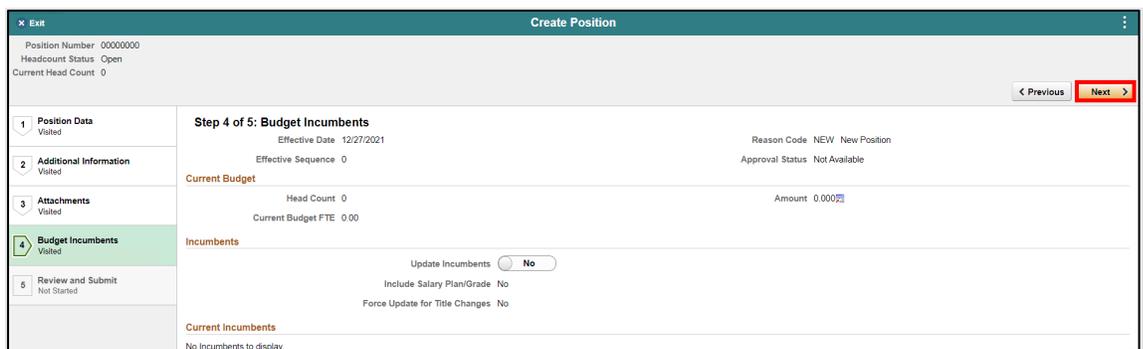


In the **Budget Incumbents** page (Step 4 of 5), users will review and leave defaulted items as is.

- **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**.



## Lesson 1: Position Management

### 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**.

Description	Proposed Value
Business Unit	PR
Department	PR08000000
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.

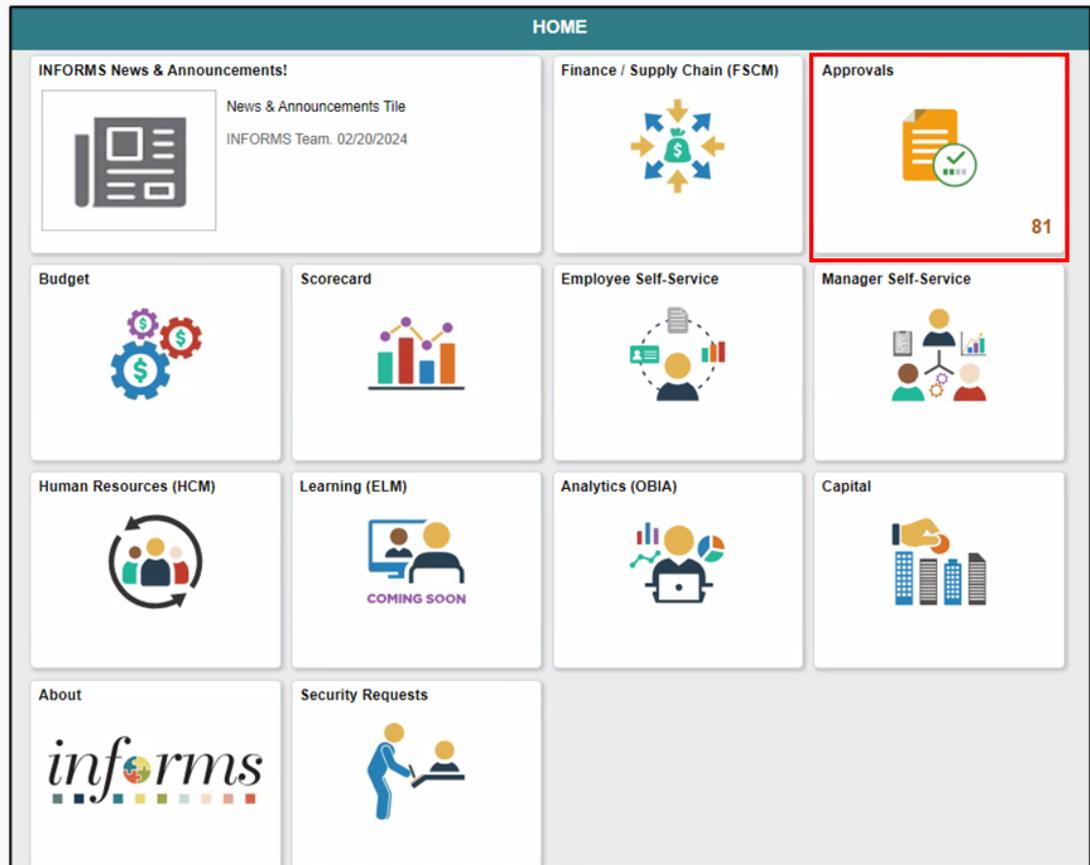
Notice the **New Position Number issued**.

## Lesson 1: Position Management

### 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**.

View By		Type	
All			3 rows
Create Position			
<b>Create Position</b>	Data Entry Specialist 1	Position Number MD000033 New Position	Routed 12/20/2021 >
<b>Create Position</b>	Park Service Aide	Position Number TST00000 New Position	Routed 12/21/2021 >
<b>Create Position</b>	HRIS Technician	Position Number 59000759 New Position	Routed 12/22/2021 >

## Lesson 1: Position Management

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**.

The screenshot shows a web application interface for creating a position. At the top, it says 'Pending Approvals' and 'Create Position'. Below this, there are fields for 'Position Number' (59000759) and 'Title' (HRIS Technician). There are three buttons: 'Approve', 'Deny', and 'Pushback'. The main content area shows 'Effective Date' (11/02/21), 'Effective Sequence' (0), and 'Reason Code' (NEW). A table titled 'Proposed Changes' is highlighted with a red border. Below the table, there are sections for 'Additional Details' (with a 'View Position Details' link highlighted in red), 'Attachment Details', 'Attachments', 'Approver Comments', and 'Approval Chain'.

Description	Proposed
Business Unit	PR
Company	MDC
Department	PR08000000
Job Code	000459
Location Code	FR00000001
Max Head Count	2
Reports To Position Number	00010780

# Lesson 1: Position Management

## Lecture 2: Budget Approval

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

View Position

Position Number 0003288  
Reasoned Status Open  
Current Head Count 0 of 0

Effective Date 10/15/2024  
Effective Sequence 0  
Reason REW New Position  
Approval Status In Approval Process

<< Previous    Next >>

**Position Information**

Position Status Approved	Max Head Count 1
Status Active	Status Date 12/11/2024
Action Date 12/15/2024	Job Sharing Permitted No
Key Position No	Non-Mayoral Yes
Budgeted Position Yes	Senior Management No

**Job Information**

Business Unit PA	Office of the Property Appraiser	Manager Level All Other Positions
Job Code 000102	Property Appraiser Clerk 1	FullPart Time Full-Time
Regular/Temporary Regular		Union Code M Local99 - General Employees
Regular Shift Not Applicable		Short Title PA Clk 1
Title Property Appraiser Clerk 1		Description <span style="border: 1px solid #ccc; padding: 2px;">Status of Work This is specialized clerical work in preparation</span>

**Work Location**

Reg Region USA	United States	Company PA Property Appraiser
Department PA01010000	PROPERTY APPRAISER'S OFFICE	Dot-Line
Location ID00000140	Stephens P. Clark Gov. Center	Security Clearance
Reports To 00012391	PROPERTY APPRAISER SUP 1 <a href="#">View Current Incumbents</a>	
Supervisor Lvl		

**Salary Plan Information**

Pay Plan Salary Admin Plan H	Grade 072
Standard Hours 00.00	Step
Work Period B	Mon Tue Wed Thu Fri Sat Sun
	Biweekly

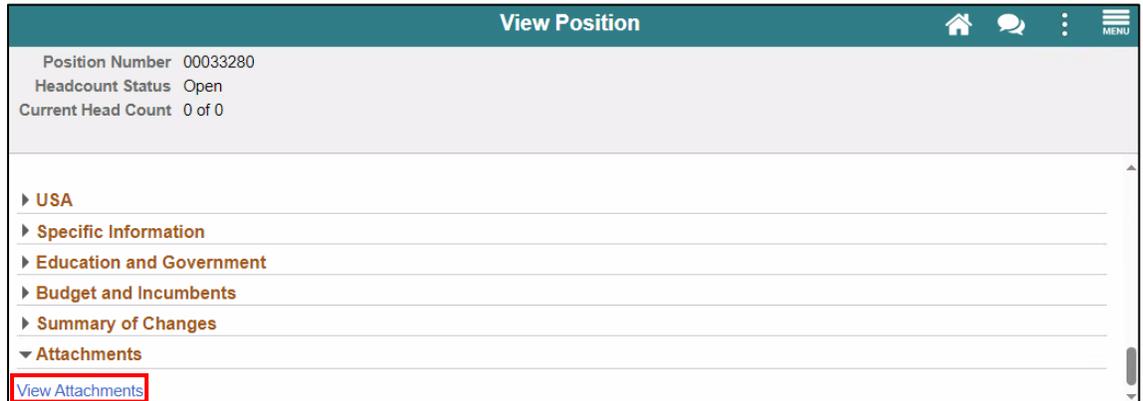
**ITSA**

- ▶ Specific Information
- ▶ Education and Government
- ▶ Budget and Incumbents
- ▶ Summary of Changes
- ▶ Attachments

## Lesson 1: Position Management

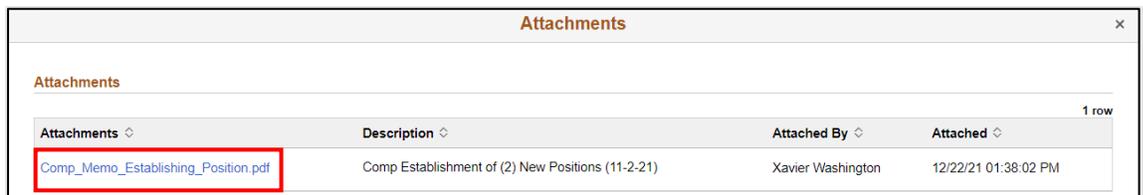
Lecture 2:  
Budget  
Approval

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



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

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



## Lesson 1: Position Management

Lecture 2:  
Budget  
Approval

Once all supporting documentation is reviewed, the user is ready to Approve or Deny the request.

5. Select **Approve**.

**NOTE:** Enter comments as needed.

6. Select **Submit**.

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

Pending Approvals			
2 rows			
<b>Create Position</b> Data Entry Specialist 1	Position Number: MD000033 New Position	Routed 12/20/2021	>
<b>Create Position</b> Park Service Aide	Position Number: TST00000 New Position	Routed 12/21/2021	>

## Lesson 1: Position Management

### Lecture 3: Validate Position

Once the New Position request is fully approved, the DPR can validate the position request.

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**.

The position information is displayed.

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

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
59000759	HRIS Technician	00010781	PR	MDC	PR08000000	Active	000459	0/2

## Lesson 1: Position Management

Lecture 3:  
Validate  
Position

Notice the Status displays **Approved**.

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

Search Results		Position Details						
Position Number: 59000759		<div style="text-align: right; border: 1px solid #ccc; padding: 2px;">Clone</div>						
Headcount Status: Open								
Current Head Count: 0 of 2								
1 row								
Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
12/27/2021	0	New Position	Parks, Recreation & Open Spcs	HUMAN RESOURCES	Hrs Technician	1451 NW 67TH ST	Approved	Approval Chain

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.

## 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

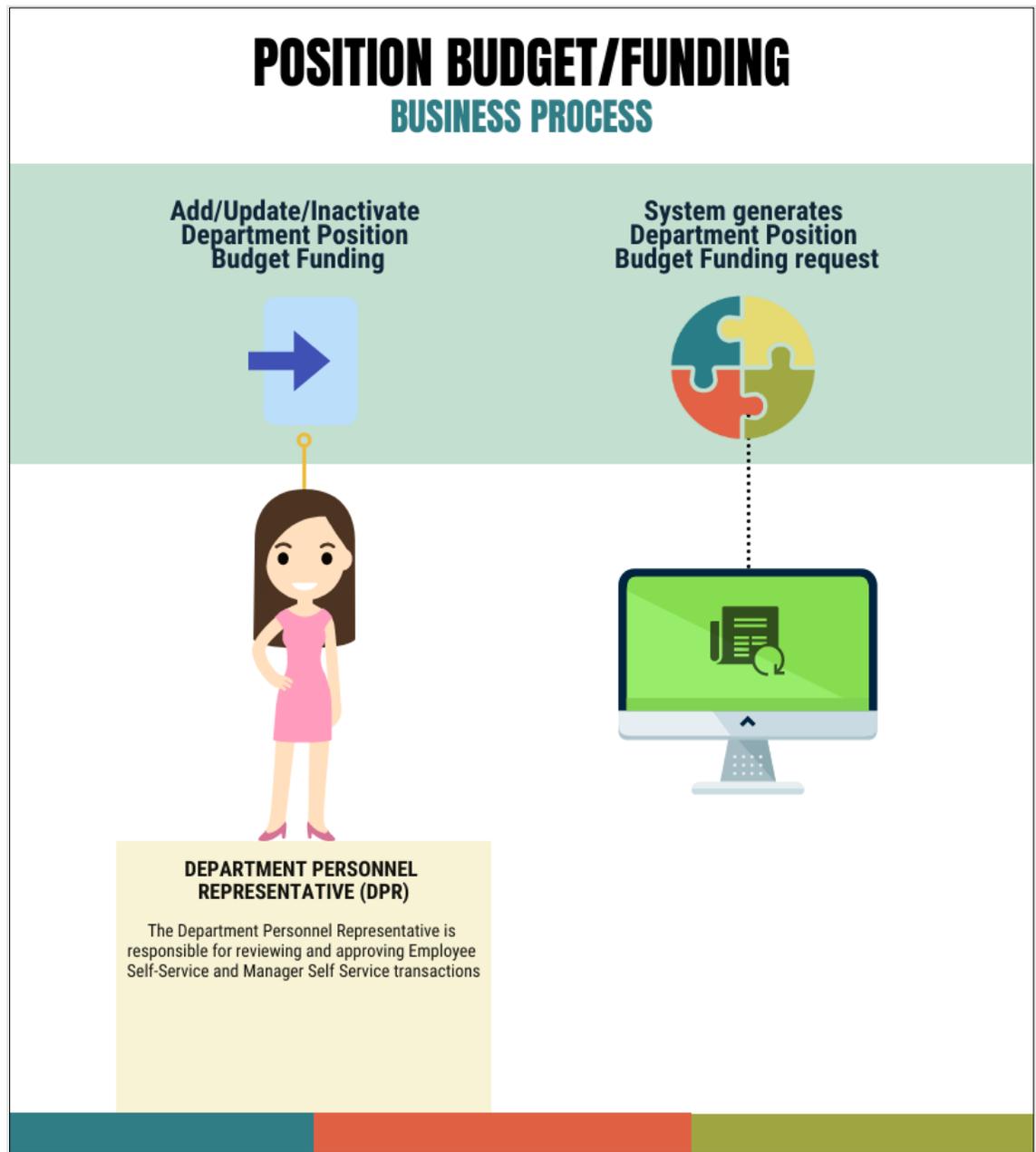
### Lesson 2: Overview

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.

## Lesson 2: Define Department/Position Budget Data

### Lesson 2: Introduction



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: Define Department/Position Budget Data

### 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
  - 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.

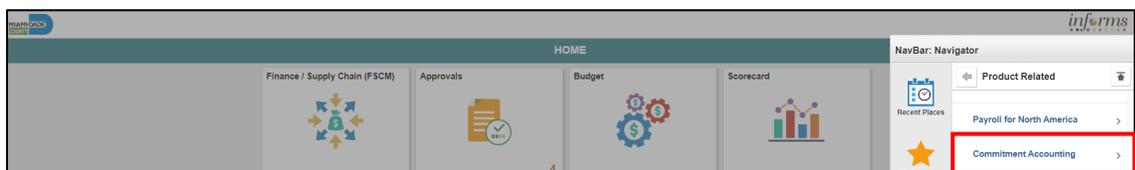
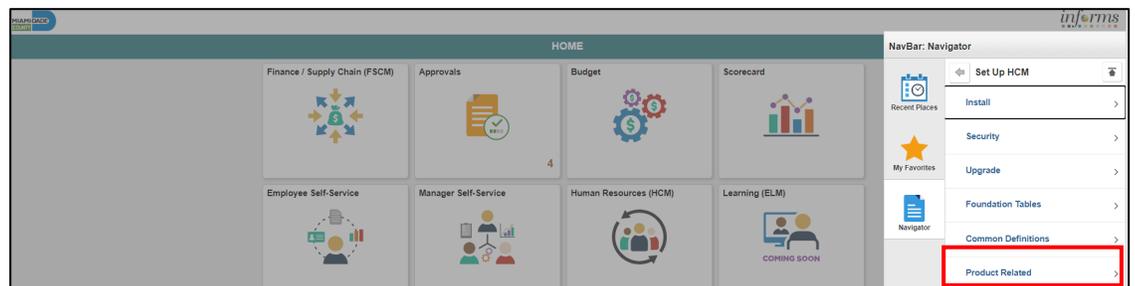
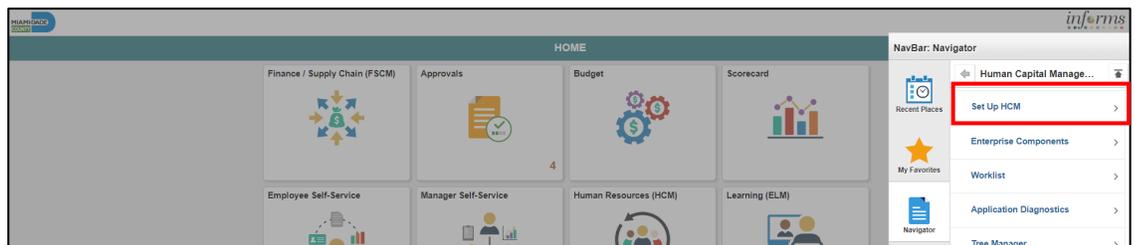
**NOTE:** The position budget date needs to coincide with the beginning of the fiscal year.

## Lesson 2: Define Department/Position Budget Data

### Lecture 1: Add Position Budget Funding

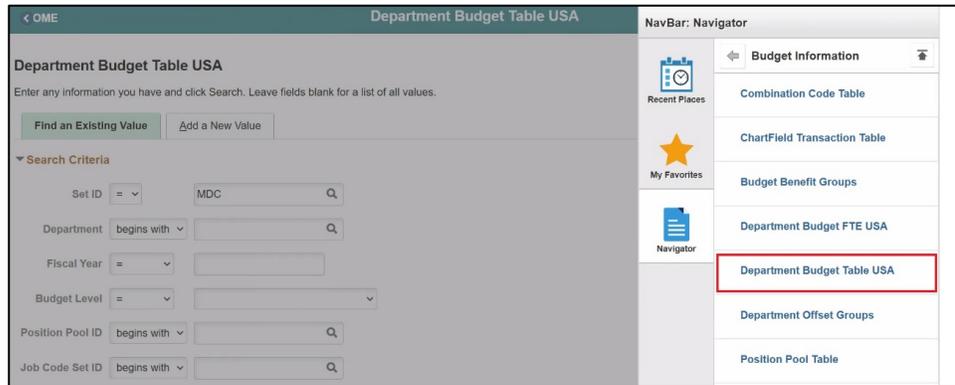
Once the new position has been fully approved, the position is ready for the designated budget funding.

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



## Lesson 2: Define Department/Position Budget Data

### Lecture 1: Add Position Budget Funding



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
<b>AVIAT</b>	Aviation Department
<b>PH</b>	Public Housing & Community
<b>SF</b>	CareerSource South Florida
<b>WASD1</b>	Water & Sewer Department
<b>MDC</b>	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.

## Lesson 2: Define Department/Position Budget Data

### Lecture 1: Add Position Budget Funding

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

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

- 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.

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

The screenshot shows the 'Department Budget Table USA' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are several input fields, each with a search icon: 'Set ID' (pre-filled with 'MDC'), 'Department', 'Fiscal Year' (pre-filled with '0'), 'Budget Level' (a dropdown menu), 'Position Pool ID', 'Job Code Set ID', 'Job Code', 'Position Number', 'Empl ID', and 'Empl Record' (pre-filled with '0'). A red box highlights the 'Add a New Value' button, another red box highlights the 'Position Number' field, and a third red box highlights the 'Add' button at the bottom left of the form.

## Lesson 2: Define Department/Position Budget Data

**Lecture 1:**  
**Add Position**  
**Budget**  
**Funding**

The **Dept Budget Date** tab requires the Fiscal Year, \*Offset Group, and the 03 Combination Code for funding the new position.

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
<b>2025</b>	FY 24-25 (10/1/24– 9/30/25)
<b>2026</b>	FY 25-26 (10/1/25 – 9/30/26)
<b>2027</b>	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.**

The screenshot shows the 'Department Budget Table USA' interface. The 'Dept Budget Date' tab is selected and highlighted with a red box. Below the tabs, the following fields are visible and highlighted with red boxes:

- Set ID:** MDC
- Department:** PR08000000 HUMAN RESOURCES
- Fiscal Year:** 2022
- \*Budget Begin Date:** 10/01/2021
- \*Budget End Date:** 09/30/2022
- \*Offset Group:** MDC (with a search icon and 'Miami Dade Offset' text below it)

Below these fields is the 'Budget Cap' section with radio buttons for 'Per Budget Level' (selected) and 'Per Earn/Tax/Ded'. The 'Suspense Combination Code' section shows:

- \*Effective Date:** 10/01/2021 (with a calendar icon)
- Effective Sequence:** 0
- Combination Code:** (empty field)
- Balance:** 0.00
- ChartField Details:** (a blue hyperlink highlighted with a red box)

At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes'.

## Lesson 2: Define Department/Position Budget Data

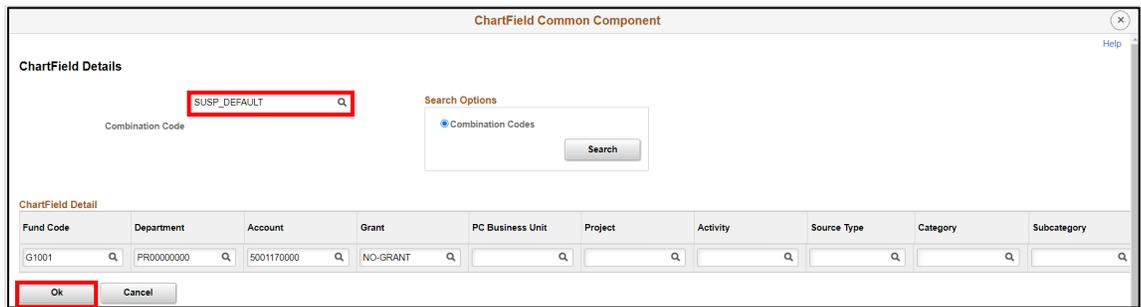
### Lecture 1: Add Position Budget Funding

The ChartField Common Component pop up will be displayed.

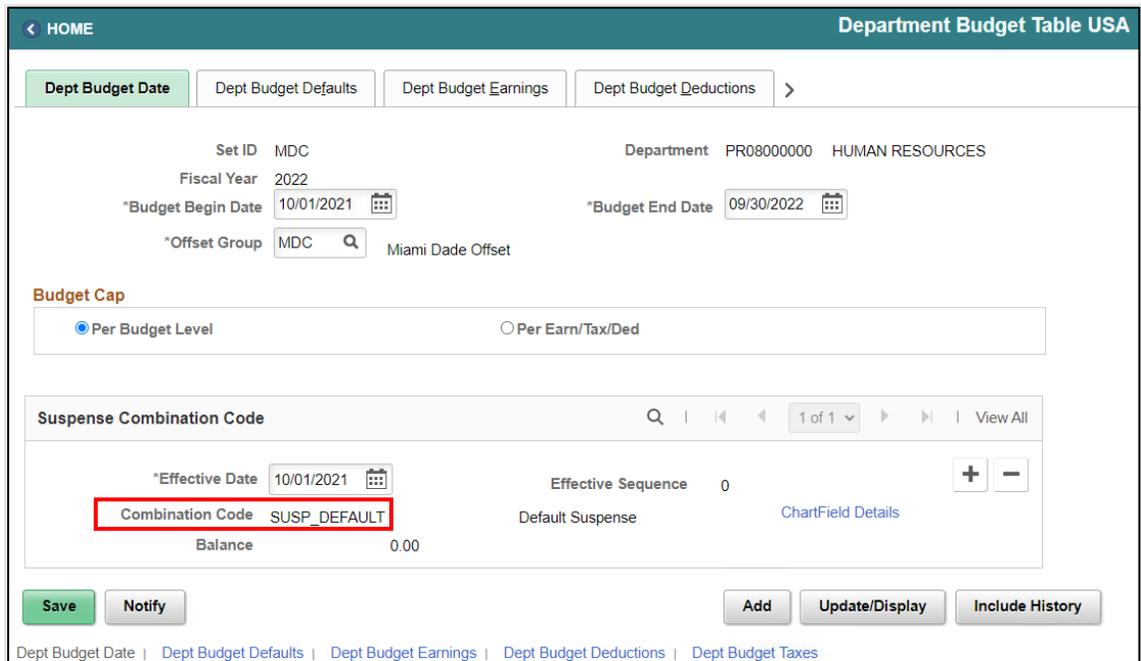
6. In the **Combination Code** field, enter **SUSP\_DEFAULT**.

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

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



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



## Lesson 2: Define Department/Position Budget Data

Lecture 1:  
Add Position  
Budget  
Funding

Select the **Dept Budget Defaults** tab.

Ensure 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**

The screenshot shows the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Date', 'Dept Budget Defaults' (highlighted with a red box), 'Dept Budget Earnings', and 'Dept Budget Deductions'. Below the tabs, the form contains the following fields:

- Set ID:** MDC
- Department:** PR08000000 HUMAN RESOURCES
- Fiscal Year:** 2022
- \*Budget Begin Date:** 10/01/2021
- \*Budget End Date:** 09/30/2022
- \*Offset Group:** MDC (Miami Dade Offset)
- Budget Cap:**  Per Budget Level,  Per Earn/Tax/Ded
- Funding Defaults:**
  - \*Default Funding Source Option:** Distrib over Actual Earnings (highlighted with a red box)
  - Funding End Date Defaults From Funding Source
  - Exclusion Fringe Group:** (empty dropdown)
- Account Overrides:**
  - Use Acct Defined for Earnings (highlighted with a red box)
  - Use Account Defined for Dedns (highlighted with a red box)
  - Use Account Defined for US Tax (highlighted with a red box)
  - Use Account Defined for Can Tax

At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes'.

## Lesson 2: Define Department/Position Budget Data

### 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**.

The screenshot displays the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings' (which is selected), and 'Dept Budget Deductions'. Below the tabs, there are fields for 'Set ID', 'MDC', 'Department' (PR08000000), 'HUMAN RESOURCES', 'Fiscal Year' (2022), 'Budget Begin Date' (10/01/2021), 'Offset Group' (MDC), 'Budget End Date' (09/30/2022), and 'Budget Cap' (Per Budget Level). The 'Level' section shows 'Position Number' 59000759, 'Effective Date' 11/15/2021, and '\*Status' Active. The 'Earnings Distribution' section has a table with one row:

Earnings Code	*Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Allow Overspend	Distribution %
1	1				<input type="checkbox"/>	100

At the bottom, there are 'Save' and 'Notify' buttons, and 'Add', 'Update/Display', and 'Include History' buttons.

## Lesson 2: Define Department/Position Budget Data

Lecture 1:  
Add Position  
Budget  
Funding

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

The screenshot shows the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings' (selected), and 'Dept Budget Deductions'. Below the tabs, there are fields for 'Set ID', 'MDC', 'Department', 'PR08000000', 'HUMAN RESOURCES', 'Fiscal Year', '2022', 'Budget Begin Date', '10/01/2021', 'Offset Group', 'MDC', 'Budget End Date', '09/30/2022', and 'Budget Cap' options. The 'Level' section has radio buttons for 'Department', 'Position Pool', 'Jobcode', 'Position' (selected), and 'Appointment'. Below this, there are fields for 'Position Number', '59000759', 'HRIS Technician', 'Effective Date', '11/15/2021', 'Eff Seq', '0', 'Status', 'Active', 'Date Entered', '03/04/2022', and 'Budget Level Cap', '0.00'. The 'Earnings Distribution' section has a table with columns: 'Earnings Code', 'Sequence Number', 'Combination Code', 'Combination Code Description', and 'ChartField Details'. The 'ChartField Details' column has a link 'ChartField Details' highlighted in a red box. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'.

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.

The screenshot shows the 'ChartField Common Component' dialog box. It has a title bar with 'ChartField Common Component' and a close button. Below the title bar, there is a 'ChartField Details' section with a search input field. To the right, there is a 'Search Options' section with a radio button for 'Combination Codes' (selected) and a 'Search' button highlighted in a red box. Below this, there is a 'ChartField Detail' section with a table of search criteria: 'Fund Code', 'Department', 'Account', 'Grant', 'PC Business Unit', 'Project', 'Activity', 'Source Type', 'Category', and 'Subcategory'. Each column has a search input field. At the bottom, there are 'Ok' and 'Cancel' buttons.

## Lesson 2: Define Department/Position Budget Data

Lecture 1:  
Add  
Position  
Budget  
Funding

10. Enter the **ChartFields** and select **Search**.  
The Combination Code ChartFields displays.
11. Select the **Select** button to load the **Combination Code**.

Search Combination Codes

GL Combination Code

**Search by ChartFields**

Fund Code	G4001	Source Type		ChartField 2	
Department	PR08010000	Category		ChartField 3	
Account	5001100000	Subcategory		Product	
Grant	NO-GRANT	Fund Affiliate			
PC Business Unit		Grant Affiliate			
Project		Affiliate			
Activity		ChartField 1			

Search Clear Cancel

Combination Code / ChartFields

Select	GL Combo Code	Account	Department	Project	Product	Fund Code	Affiliate	Grant	ChartField 1	ChartField 2
Select	000000815	5001100000	PR08010000			G4001		NO-GRANT		

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

12. Select **Save**.

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

Budget Begin Date 10/01/2021 Offset Group MDC Budget Cap  Per Budget Level  Per Earn/Tax/Ded

Budget End Date 09/30/2022

Default Funding Source Option Distrib over Actual Earnings

**Level** | Department | Position Pool | Jobcode | **Position** | Appointment

Position Number 59000759 HRIS Technician \*Effective Date 11/15/2021 Eff Seq 0 \*Status Active Date Entered 03/04/2022

Budget Level Cap 0.00 \*Currency USD

**Earnings Distribution**

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	000000815	EMPLOYEE REGULAR	ChartField Details

Save Notify Add Update/Display Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

## Lesson 2: Define Department/Position Budget Data

### Lecture 1: Add Position Budget Funding

Notice the **Dept Budget Deductions** and **Dept Budget Taxes** pages automatically have the **Sequence, Distribution %, and Combination Code** entered.

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

## Lesson 2: Define Department/Position Budget Data

Lecture 2:  
Update  
Position  
Budget  
Funding

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

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
<b>AVIAT</b>	Aviation Department
<b>PH</b>	Public Housing & Community
<b>SF</b>	CareerSource South Florida
<b>WASD1</b>	Water & Sewer Department
<b>MDC</b>	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
<b>2025</b>	FY 24-25 (10/1/24– 9/30/25)
<b>2026</b>	FY 25-26 (10/1/25 – 9/30/26)
<b>2027</b>	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**.

## Lesson 2: Define Department/ Position Budget Data

Lecture 2:  
Update  
Position  
Budget  
Funding

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

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**.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected. The 'Level' section shows details for a 'SOCIAL WORKER AIDE' position, with the 'Effective Date' field highlighted in red and containing '06/28/2021'. The 'Earnings Distribution' section shows a table with one entry where the '\*Sequence Number' and 'Distribution %' fields are highlighted in red, containing '1' and '100.000' respectively. Navigation buttons like 'Save', 'Return to Search', and 'Notify' are visible at the bottom.

## Lesson 2: Define Department/ Position Budget Data

### 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.

Human Resources (HCM)
Department Budget Table USA

Dept Budget Date

Dept Budget 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 Offset Group MDC

Budget End Date 09/30/2021

Default Funding Source Option Distrib over Actual Earnings

**Budget Cap**

Per Budget Level  Per Earn/Tax/Ded

Level
1 of 2
View All

Department
  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

Budget Level Cap 9,999,999,999.00 \*Currency USD

Earnings Distribution
1-1 of 1

Combination Code

Distributed

Earning Code Description

Combination Code Description

Exclusion Fringe Group

Redirect Combo Code

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	000000199	EMPLOYEE REGULAR	<a href="#" style="border: 1px solid red; padding: 2px;">ChartField Details</a>

Save
Return to Search
Notify

Add
Update/Display
Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

## Lesson 2: Define Department/Position Budget Data

Lecture 2:  
Update  
Position  
Budget  
Funding

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 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.**

Notice the updated Combination Code and Combination Code Description.

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	000000200	EMPLOYEE REGULAR	ChartField Details

## Lesson 2: Define Department/ Position Budget Data

### Lecture 2: Update Position Budget Funding

In the **Dept Budget Deductions** page users are responsible for updating the **\*Sequence Number**, **Distribution Percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Deductions** 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**.

Human Resources (HCM) Department Budget Table USA

Dept Budget Date | Dept Budget 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: Department, 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

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1				1	000000200				100.000

Save | Return to Search | Notify | 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.

HOME Department Budget Table USA

Dept Budget Date | Dept Budget 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: Department, 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

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1				1	000000199	EMPLOYEE REGULAR	ChartField Details

Save | Return to Search | Notify | Add | Update/Display | Include History

## Lesson 2: Define Department/ Position Budget Data

Lecture 2:  
Update  
Position  
Budget  
Funding

The **ChartField Common Component** is now displayed.

- In the **Combination Code** field, enter the same **Combination Code** entered on the **Dept Budget Earnings** page.
- Select **Ok**.

Notice the updated Combination Code and Combination Code Description listed.

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

## Lesson 2: Define Department/ Position Budget Data

### Lecture 2: Update Position Budget Funding

In the **Dept Budget Taxes** page users are responsible for updating the **\*Sequence Number**, **Distribution Percentage**, and **Combination Code** of the position.

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%.)

The screenshot shows the 'Dept Budget Taxes' tab selected. The 'Tax Distribution' table has the following data:

State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	00000200				100.000

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.

The screenshot shows the 'Combination Code Description' tab selected. The 'Tax Distribution' table has the following data:

State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	00000199	ChartField Details	EMPLOYEE REGULAR

## Lesson 2: Define Department/ Position Budget Data

Lecture 2:  
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 Common Component**

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
SC001	CH01010101	5001100000	NO-GRANT						

Buttons: Ok, Cancel

Notice the updated Combination Code and Combination Code Description listed.

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

Human Resources (HCM) | Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

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: 1 of 2 | View All

Position Number: 00000881 | SOCIAL WORKER AIDE | Effective Date: 06/28/2021 | Eff Seq: 0 | Status: Active | Date Entered: 02/17/2022

Tax Distribution

State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	00000200	ChartField Details	EMPLOYEE REGULAR

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History

## Lesson 2: Define Department/ Position Budget Data

### 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**.

The screenshot displays the 'Department Budget Table USA' interface. At the top, it shows the 'Dept Budget Taxes' tab selected. Below this, the system information includes Set ID MDC, Department CH00000000, and Fiscal Year 2021. The main content area is divided into two sections, each representing a different record for the position 'SOCIAL WORKER AIDE'.

**Record 1 (Top):**

- Position Number: 00000881
- Effective Date: 06/28/2021
- Eff Seq: 0
- Status: Active
- Date Entered: 02/17/2022
- Combination Code: 000000200
- Combination Code Description: EMPLOYEE REGULAR

**Record 2 (Bottom):**

- Position Number: 00000881
- Effective Date: 10/01/2020
- Eff Seq: 0
- Status: Active
- Date Entered: 07/01/2021
- Combination Code: 000000199
- Combination Code Description: EMPLOYEE REGULAR

At the bottom left of the interface, the 'Save' button is highlighted with a red box. Other buttons include 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'.

10. The Updating Budget Funding process is now complete.

## Lesson 2: Define Department/ Position Budget Data

### Lecture 3: Inactivate Position Budget Funding

When inactivating the budget funding of a position users must ensure the position was fully approved and inactivated via Position Management before inactivating the budget funding. 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**

1. 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

2. 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 Number** field, enter the **Position Number** of the position that is being inactivated.

## Lesson 2: Define Department/Position Budget Data

Lecture 3:  
Inactivate  
Position  
Budget  
Funding

4. Select **Search**.

Department Budget Table USA

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Set ID = MDC

Department begins with

Fiscal Year =

Budget Level =

Position Pool ID begins with

Job Code Set ID begins with

Job Code begins with

Position Number begins with

Empl ID begins with

Empl Record =

Include History

Search Clear Basic Search Save Search Criteria

Select the **Dept Budget Earnings** tab.

5. On the **Level** Section, select the **Plus (+)** button to enter the **\*Effective Date** which is the date 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 Budget Table USA

Dept Budget Date Dept Budget 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 Offset Group MDC Budget Cap

Budget End Date 09/30/2021  Per Budget Level  Per Earn/Taxi/Ded

Default Funding Source Option Distrib over Actual Earnings

Level

Department  Position Pool  Jobcode  Position  Appointment

Position Number: 00000001

Effective Date: 08/09/2021

Eff Seq: 0 Status: Inactive

Date Entered: 02/25/2022

Budget Level Cap: 9,999,999.99

\*Currency: USD

Earnings Distribution

Combination Code	Distributed	Earning Code Description	Combination Code Description	Exclusion Fringe Group	Redirect Combo Code
1	1	000000200	EMPLOYEE REGULAR		

Save Return to Search Notify

Add Update/Display Include History

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

## Lesson 2: Define Department/Position Budget Data

### 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**.
11. Select **Save**.

The screenshot displays the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings' (highlighted with a red box), and 'Dept Budget Deductions'. Below the tabs, there are fields for 'Set ID', 'MDC', 'Department', 'CH00000000', 'COMM ACTION & HUMAN SRVC. DPT.', 'Fiscal Year', '2021', 'Budget Begin Date', '10/01/2020', 'Offset Group', 'MDC', 'Budget End Date', '09/30/2021', and 'Default Funding Source Option', 'Distrib over Actual Earnings'. There is also a 'Budget Cap' section with radio buttons for 'Per Budget Level' and 'Per Earn/Tax/Ded'. Below this is the 'Level' section with radio buttons for 'Department', 'Position Pool', 'Jobcode', 'Position' (selected), and 'Appointment'. There are plus and minus buttons next to these options. The 'Position' section includes fields for 'Position Number', '00000881', '\*Effective Date', '08/09/2021' (highlighted with a red box), 'Eff Seq', '0', '\*Status', 'Inactive' (highlighted with a red box), 'Date Entered', '02/25/2022', 'Budget Level Cap', '9,999,999,999.00', and '\*Currency', 'USD'. Below the 'Level' section is the 'Earnings Distribution' table with columns for 'Combination Code', 'Distributed', 'Earning Code Description', 'Combination Code Description', 'Exclusion Fringe Group', and 'Redirect Combo Code'. The table has one row with '1' in the 'Earnings Code' column, '1' in the '\*Sequence Number' column, '00000200' in the 'Combination Code' column, 'EMPLOYEE REGULAR' in the 'Combination Code Description' column, and 'ChartField Details' in the 'ChartField Details' column. At the bottom, there are buttons for 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes'.

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

## Lesson 2: Define Department/ Position Budget Data

### Key Terms



The following key terms are used in this module:

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

## Lesson 2: Define Department/Position Budget Data

### 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

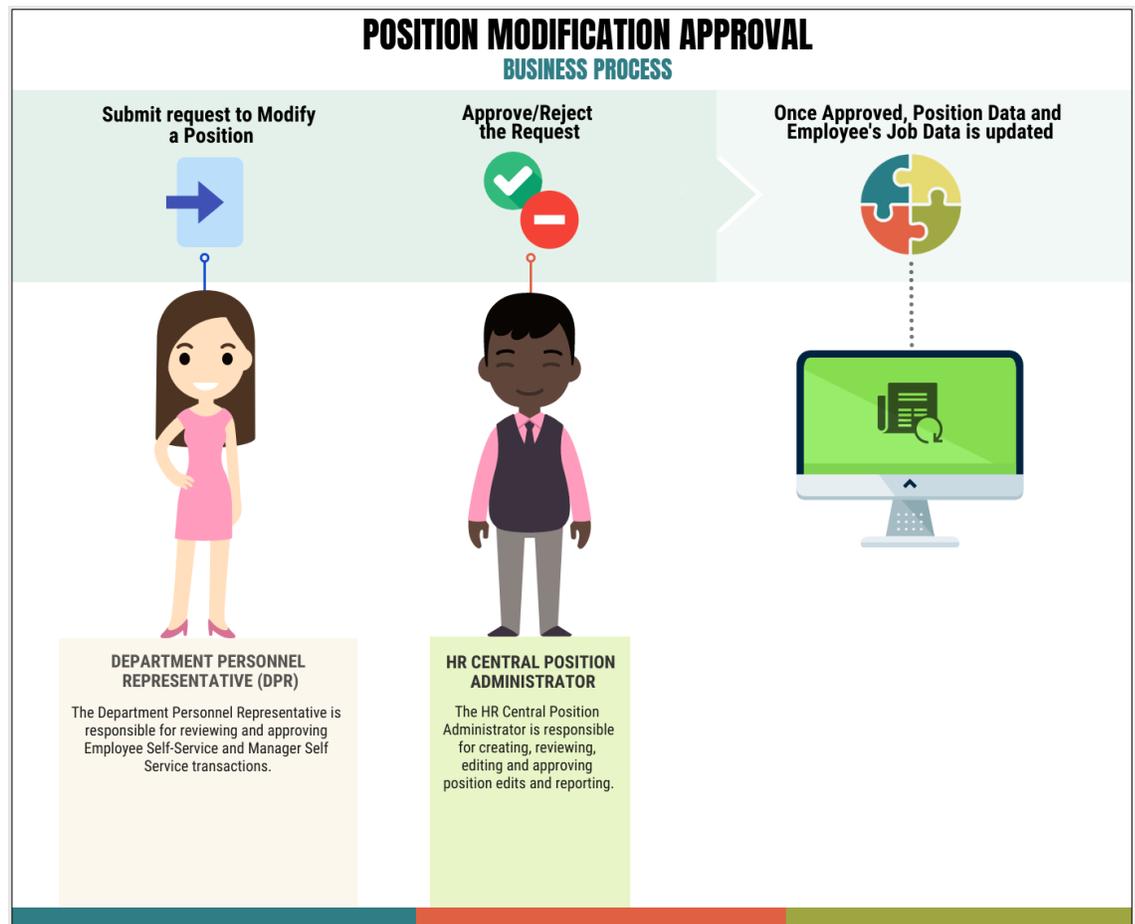
### Lesson 3: Overview

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

- Modify a Position
- Validate the Modification Request
- Inactivate a Position
- Validate the Inactive Request

## Lesson 3: Submitting Position Change

### Lesson 3: Introduction



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.

## Lesson 3: Submitting Position Change

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Historical Row</b>	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.
<b>Top of Stack</b>	When the position effective date is equal to or greater than a Job's effective date, INFORMS automatically updates the Job record once approved.

## Lesson 3: Submitting Position Change

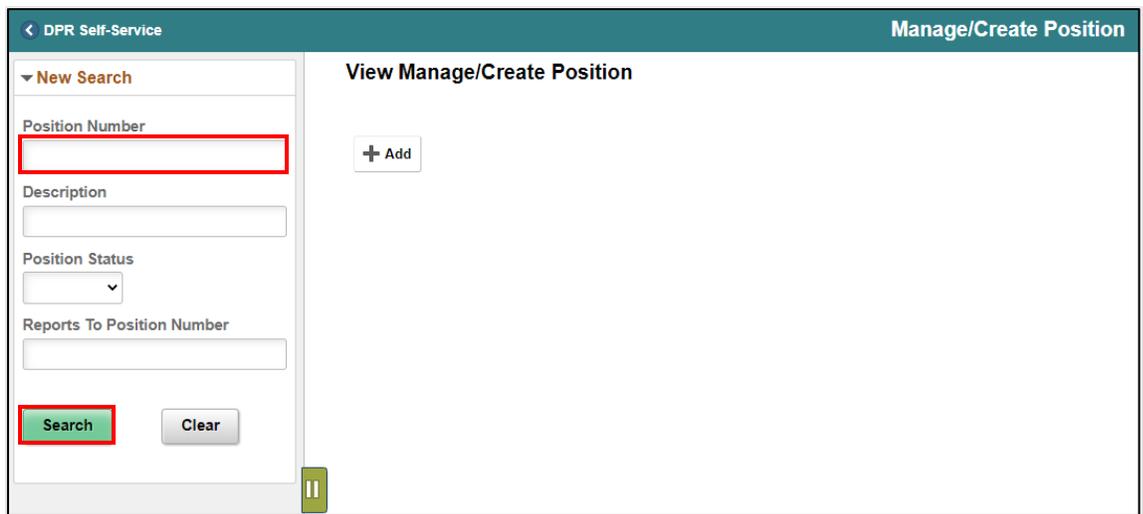
### Lecture 1: Modify Position

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**.



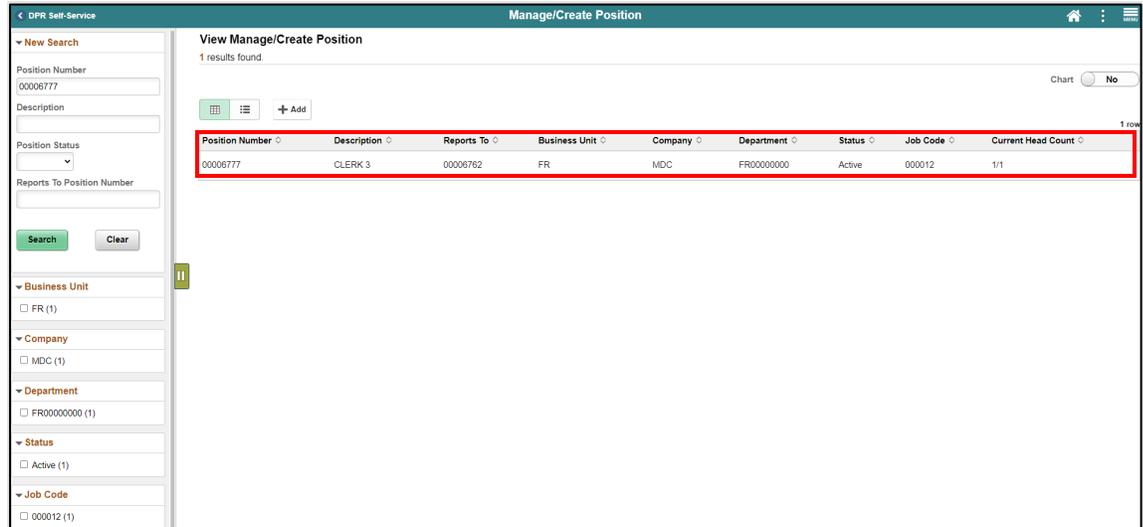
The screenshot displays the 'Manage/Create Position' interface within the 'DPR Self-Service' system. On the left, there is a search form titled 'New Search' with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' (highlighted with a red box) and 'Clear' buttons. On the right, the main area is titled 'View Manage/Create Position' and contains a '+ Add' button. A green pause icon is visible at the bottom right of the interface.

## Lesson 3: Submitting Position Change

### Lecture 1: Modify Position

The position information is displayed.

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



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



## Lesson 3: Submitting Position Change

### 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
<b>FTE</b>	Change from Temporary to Regular
<b>INA</b>	Position Inactivated (Must have an effective date and <b>no incumbents in the position</b> )
<b>RTC</b>	Reports to Change (Must have an effective date and incumbents in the position)
<b>STA</b>	Position Status Change
<b>UPD</b>	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**.

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.

## Lesson 3: Submitting Position Change

### Lecture 1: Modify Position

7. Review the requested modifications and select **Next**.

**Manage Position**

Position Number: 00006777  
Headcount Status: Filled  
Current Head Count: 1 of 1

**Step 1 of 5: Position Data**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: RTC Reports To Change  
Approval Status: Not Available

**Position Information**

\*Filed Status:   
\*Status:   
Budgeted Position:  Yes  
Senior Management:  No

Max Head Count:   
Non Mayoral:  No

**Job Information**

\*Business Unit: FR Fire Rescue  
\*Job Code: 000012 Clerk 3  
\*Regular/Temporary: Regular  
\*Regular Shift: Not Applicable  
\*Title: CLERK 3

\*FullPart Time: Full-Time  
Union Code: K GSAP - OPEIU Local 100  
Short Title: CLERK 3  
Description: NATURE OF WORK: This is supervisory, clerical work or independent

**Work Location**

\*Reg Region: USA United States  
\*Department: FR00000000 FIRE DEPARTMENT  
Location: FR00000056 9300 NW 41ST ST  
Reports To: 00007345 CLERK 4 View Current Incumbents  
Supervisor Level: 12 Supervisor Classes

\*Company: MDC Miami Dade County

**Salary Plan Information**

Salary Admin Plan: STEP  
Standard Hours: 80.00  
Work Period: B Biweekly  
Grade: 75  
Step:

Specific Information  
USA

**Next**

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

**Manage Position**

Position Number: 00006777  
Headcount Status: Filled  
Current Head Count: 1 of 1

**Step 2 of 5: Additional Information**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: RTC Reports To Change  
Approval Status: Not Available

**Education and Government**

\*Pre-Encumbrance Indicator:   
\*Encumber Salary Option:   
\*Classified Indicator:

FTE:   
Adds to FTE Actual Count:  Yes

**Next**

Attachments for this process are optional.

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

**Manage Position**

Position Number: 00006777  
Headcount Status: Filled  
Current Head Count: 1 of 1

**Step 3 of 5: Attachments**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: RTC Reports To Change  
Approval Status: Not Available

**Attachments**

You have not added any Attachments.

**Next**

## Lesson 3: Submitting Position Change

### Lecture 1: Modify Position

- 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.

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

**Step 4 of 5: Budget Incumbents**

Effective Date: 01/05/2022      Reason Code: RTC Reports To Change  
 Effective Sequence: 0      Approval Status: Not Available

**Current Budget**

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

**Incumbents**

Update Incumbents:  Yes  No  
 Include Salary Plan/Grade:  No  No  
 Force Update for Title Changes:  No  No

**Current Incumbents**

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Glinda King	00198155	0	Full-Time	80.00	12/28/2020	Data Change	Conversion	N	Job Data

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

**Step 5 of 5: Review and Submit**

Effective Date: 01/05/2022      Reason Code: RTC Reports To Change  
 Effective Sequence: 0      Approval Status: Not Available

**Summary Of Changes**

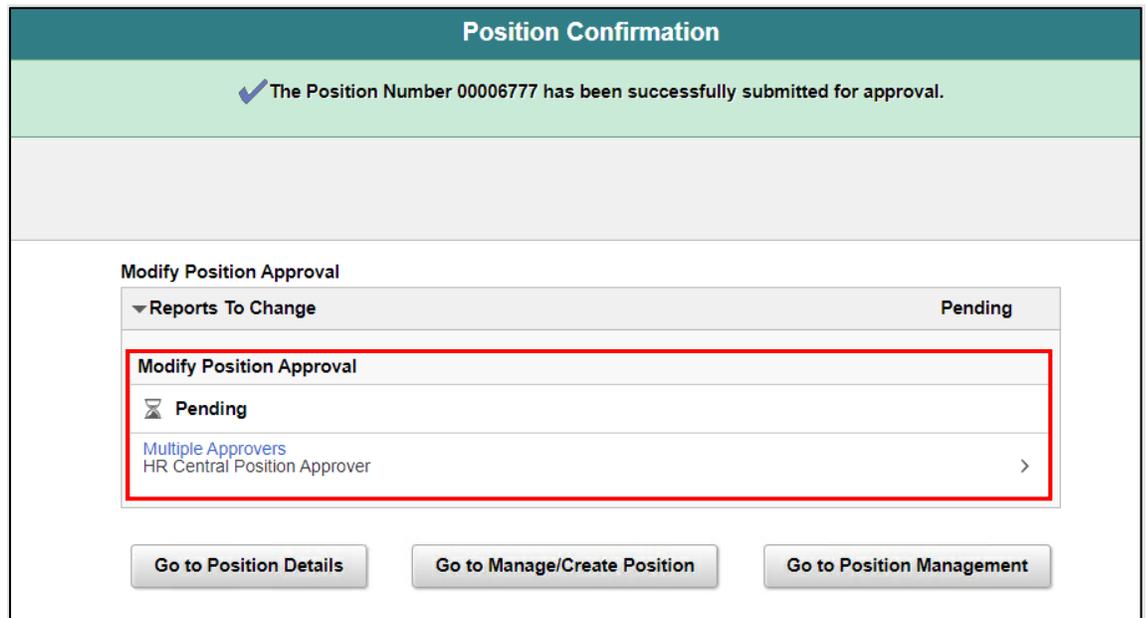
Description	Proposed Value	Current Value
Reason Code	RTC	CNV
Action Date	2022-01-10	2014-10-30
Reports To Position Number	00007345	00006782

## Lesson 3: Submitting Position Change

### 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.



## Lesson 3: Submitting Position Change

### Lecture 2: Validating Modification Request

Validating the modification request affects the Position.

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

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

The position information is displayed.

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

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00006777	CLERK 3	00007345	FR	MDC	FR00000000	Active	000012	1/1

## Lesson 3: Submitting Position Change

### 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.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
01/05/2022	0	Reports To Change	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	

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**

Position Number: 0003280  
Headcount Status: Open  
Current Head Count: 0 of 0

---

Effective Date: 10/15/2024

Reason: NEW: New Position  
 Approval Status: In Approval Process

---

**Position Information**

Position Status: Approved  
 Status: Active  
 Action Date: 12/13/2024  
 Key Position: No  
 Budgeted Position: Yes  
 Senior Management: No

Max Head Count: 1  
 Status Date: 12/11/2024

---

**Job Information**

Business Unit: PA  
 Job Code: 000102  
 Regular/Temporary: Regular  
 Regular Shift: Not Applicable  
 Title: Property Appraiser Clerk 1

Office of the Property Appraiser  
 Property Appraiser Clerk 1

Manager Level: All Other Positions  
 FullPart Time: Full-Time  
 Union Code: M  
 Short Title: PA Clk 1  
 Local 999 - General Employees

---

**Work Location**

Reg Region: USA  
 Department: PA01010000  
 Reports To: 00012391

United States  
 PROPERTY APPRAISER'S OFFICE  
 Stephen P. Clark Gov. Center  
 PROPERTY APPRAISER SUP 1

Company: PA  
 DoI-Line  
 Security Clearance

---

**Salary Plan Information**

Pay Plan  
 Salary Admin Plan: H  
 Standard Hours: 80.00  
 Work Period: B

Grade: 072  
 Step

Mon Tue Wed Thu Fri Sat Sun  
 Weekly

---

USA

- Specific Information
- Education and Government
- Budget and incumbents
- Summary of Changes
- Attachments



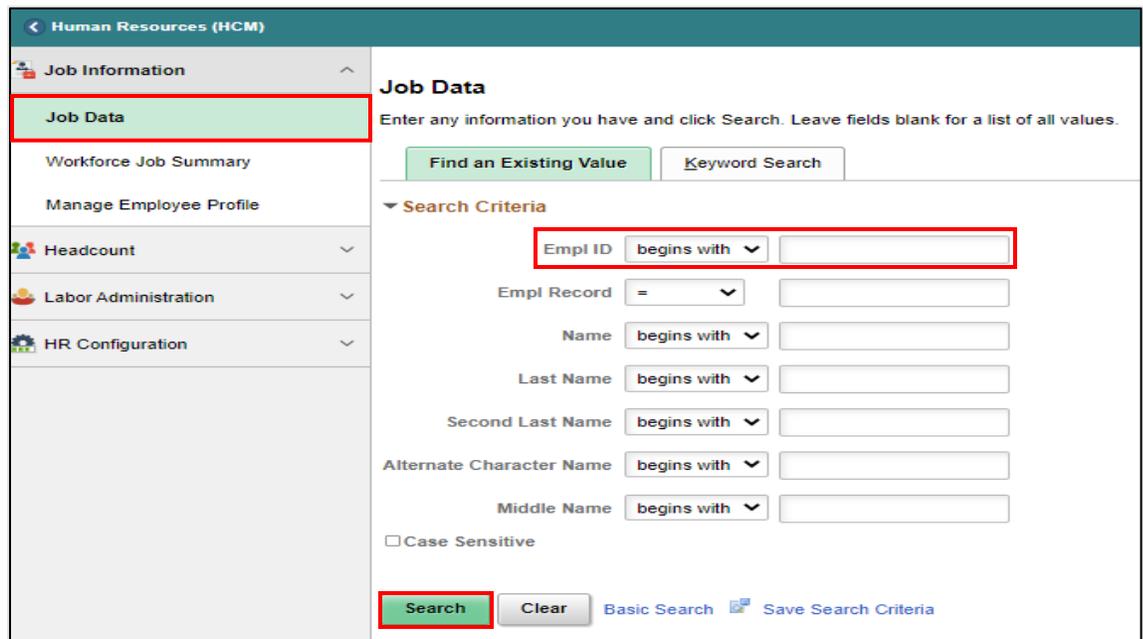
## Lesson 3: Submitting Position Change

### 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
- Workforce Job Summary
- Manage Employee Profile

**Headcount**

**Labor Administration**

**HR Configuration**

**Job Data**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Keyword Search**

**Search Criteria**

Empl ID begins with

Empl Record =

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](#)

## Lesson 3: Submitting Position Change

### 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**.

**Human Resources (HCM) HR Administration**

Job Information | Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Glinda King Employee | Empl ID 00198155 | Empl Record 0

**Job Information Details**

Effective Date: 01/05/2022

Effective Sequence: 0 | Action: Position Change

HR Status: Active | Reason: Reports To Change

Payroll Status: Active | Job Indicator: Primary Job

Job Code: 000012 | Clerk 3

Entry Date: 12/22/2003

Supervisor Level: 12 | Supervisor Classes

Supervisor ID

**Reports To: 00007345 CLERK 4 00158740 Nola Foster**

Regular/Temporary: Regular | Full/Part: Full-Time

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

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.

## Lesson 3: Submitting Position Change

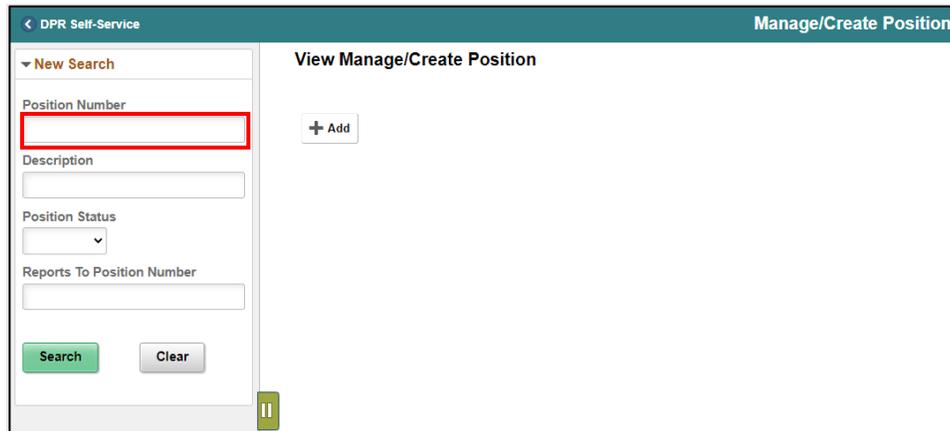
### Lecture 3: Inactivate Position

When inactivating a position, it is important to ensure there are no incumbents in the position.

**NOTE:** 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**

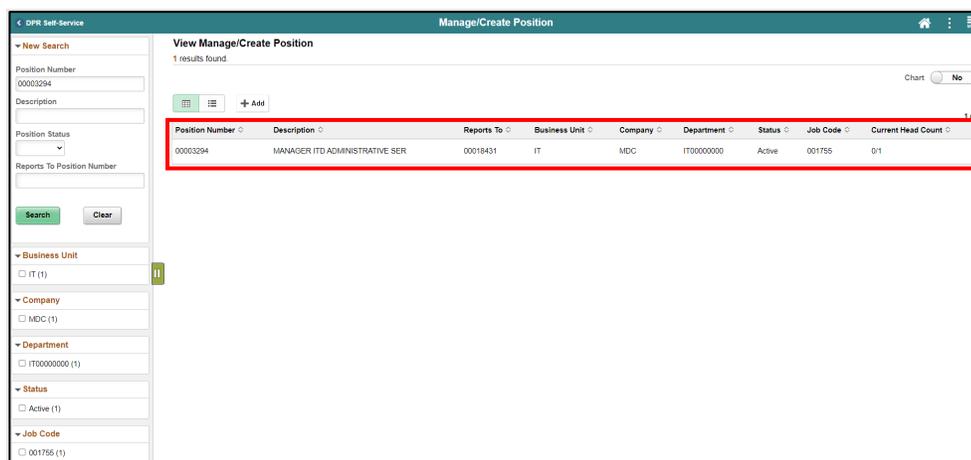
1. In the **Position Number** field, enter the **position number** being inactivated.
2. Select **Search**.



The position information is displayed.

3. Select the **position being inactivated**.

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



## Lesson 3: Submitting Position Change

### Lecture 3: Inactivate Position

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

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5880 SW 87 AVE	Approved	Approval Chain

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**.

**Request Details**

\*Effective Date: 01/05/2022

Effective Sequence: 0

Reason Code: INA Position Inactivated

**Continue**

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

\*Status: Inactive

Budgeted Position:  Yes

Senior Management:  No

Max Head Count: 1

Non-Mayoral:  No

## Lesson 3: Submitting Position Change

### Lecture 3: Inactivate Position

9. Review the requested modifications and select **Next**.

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

**Step 1 of 5: Position Data**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: INA Position Inactivated  
Approval Status: Not Available

**Position Information**

\*Filed Status: **Approved**  
\*Status: **Inactive**  
Budgeted Position:  Yes  No  
Senior Management:  Yes  No

Max Head Count:   
Non-Mayoral:  Yes  No

**Job Information**

\*Business Unit: IT Information Technology  
\*Job Code: 001755 Manager IS Administrative Svc  
\*Regular/Temporary: Regular  
\*Regular Shift: Not Applicable  
\*Title: MANAGER ITD ADMINISTRATIVE SER

\*Full/Part Time: Full-Time  
\*Union Code: L Non Bargaining  
Short Title: MORTDADSV  
Description: MANAGER ITD ADMINISTRATIVE SER

**Work Location**

\*Reg Region: USA United States  
\*Department: IT00000000 INFORMATION TECHNOLOGY DEPT  
Location: ID00000705 5880 SW 87 AVE  
Reports To: 00018431 DIV DIR ITD View Current Incumbents  
Supervisor Level:

\*Company: MDC Miami Dade County

**Salary Plan Information**

Salary Admin Plan: PKYO  
Standard Hours: 80.00  
Work Period: B Biweekly  
Grade: 055  
Step:

> Specific Information  
> USA

**Next**

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

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

**Step 2 of 5: Additional Information**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: INA Position Inactivated  
Approval Status: Not Available

**Education and Government**

\*Pre-Encumbrance Indicator: Encumber Immediately  
\*Encumber Salary Option: Salary Step  
\*Classified Indicator: Classified

FTE:   
Adds to FTE Actual Count:

**Next**

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**.

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

**Step 3 of 5: Attachments**

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: INA Position Inactivated  
Approval Status: Not Available

**Attachments**

You have not added any Attachments.

**Add Attachment**

**Next**

## Lesson 3: Submitting Position Change

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**.

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

Step 3 of 5: Attachments

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: INA Position Inactivated  
Approval Status: Not Available

Attachments

Add Attachment

Attachments	Description	Attached By	Attached	Status
Deactivate_Position_00003294_(1-5-22).docx	Memo to Deactivate Position (1-5-22)	Xavier Washington	01/05/22 03:53:20 PM	Active

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

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

Step 4 of 5: Budget Incumbents

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason Code: INA Position Inactivated  
Approval Status: Not Available

Current Budget

Earnings: 0.000  
Deductions: 0.000  
Tax: 0.000  
Cdn Tax: 0.000  
Total: 0.000

Incumbents

Update Incumbents:  Yes  No

Include Salary Plan/Grade: No  
Force Update for Title Changes: No

Current Incumbents  
No Incumbents to display.

## Lesson 3: Submitting Position Change

### 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.

**Manage Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

Step 5 of 5: Review and Submit

Effective Date: 01/05/2022  
Effective Sequence: 0

Reason Code: INA Position Inactivated  
Approval Status: Not Available

**Summary Of Changes**

Description	Proposed Value	Current Value
Status as of Effective Date	I	A
Reason Code	INA	CAV
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.

**Position Confirmation**

✓ The Position Number 00003294 has been successfully submitted for approval.

**Modify Position Approval**

Position Inactivated Pending

**Modify Position Approval**

Pending

Multiple Approvers  
HR Central Position Approver >

Go to Position Details
Go to Manage/Create Position
Go to Position Management

This concludes the Inactive Position process.

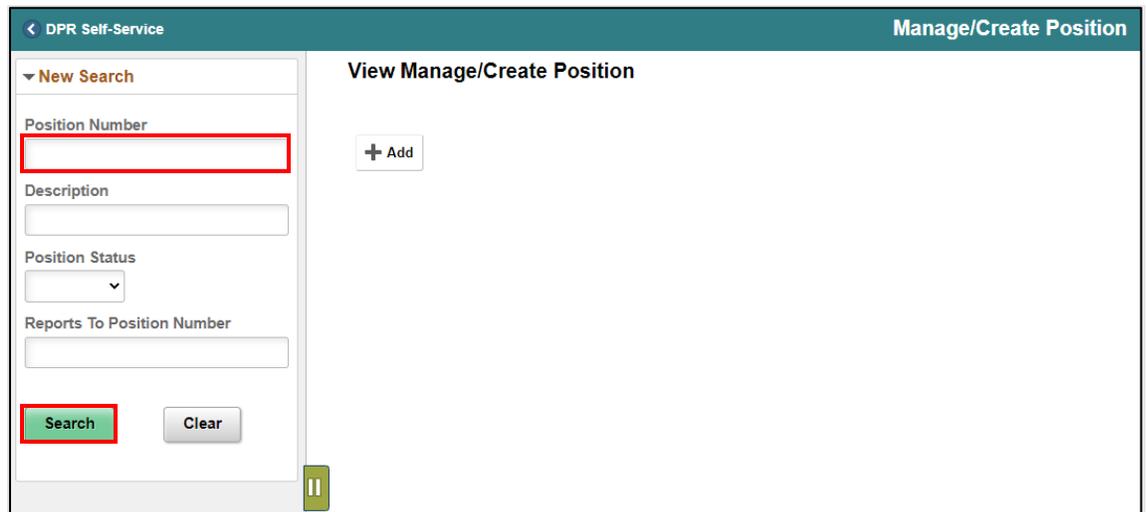
## Lesson 3: Submitting Position Change

Lecture 4:  
Validating  
Inactive  
Position

Validating the modification request affects the Position.

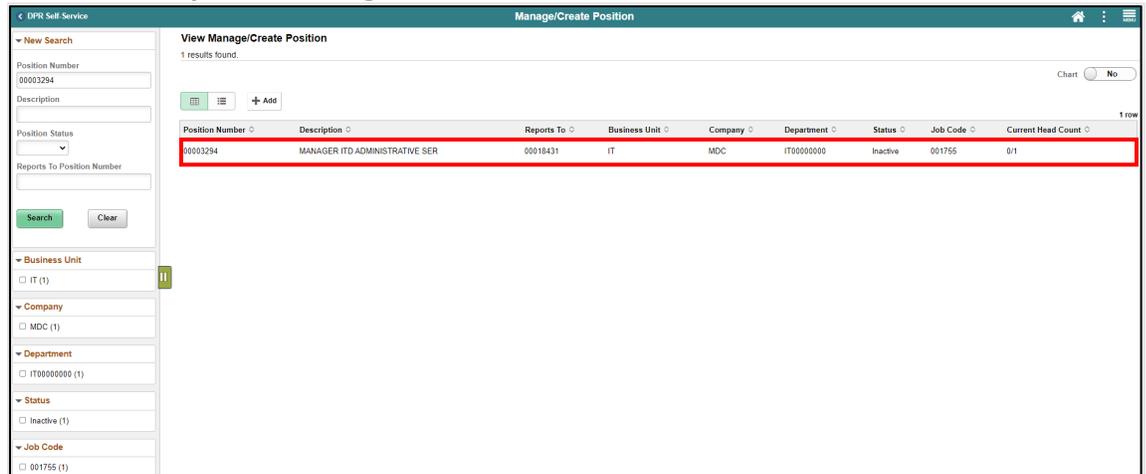
Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

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



The position information is displayed.

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



## Lesson 3: Submitting Position Change

### Lecture 4: Validating Inactive Position

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

Notice the recent request approved.

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

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
01/05/2022	0	Position Inactivated	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5600 SW 67 AVE	Approved	Approval Chain	>
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5600 SW 67 AVE	Approved	Approval Chain	>

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

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

**View Position**

Position Number: 00003294  
Headcount Status: Open  
Current Head Count: 0 of 1

Effective Date: 01/05/2022  
Effective Sequence: 0  
Reason: **INA - Position Inactivated**  
Approval Status: **Approved**

**Position Information**

Position Status: Approved  
Status: Inactive  
Action Date: 01/05/2022  
Key Position: No  
Budgeted Position: Yes  
Senior Management: No

Max Head Count: 1  
Status Date: 03/20/2019  
Job Sharing Permitted: No  
Non-Mayoral: No

**Job Information**

Business Unit: IT Information Technology  
Job Code: 001755 Manager Itd Administrative Svc  
Regular/Temporary: Regular  
Regular Shift: Not Applicable  
Title: MANAGER ITD ADMINISTRATIVE SER

Manager Level: All Other Positions  
Full/Part Time: Full-Time  
Union Code: L Non Bargaining  
Short Title: MGRITDADSV  
Description: MANAGER ITD ADMINISTRATIVE SER

**Work Location**

Reg Region: USA United States  
Department: IT0000000 INFORMATION TECHNOLOGY DEPT  
Location: ID00000705 5600 SW 67 AVE  
Reports To: 00018431 DIV DIR ITD View Current Incumbents  
Supervisor Lvl: Security Clearance

Company: MDC Main Date County

**Salary Plan Information**

Pay Plan: Salary Admin Plan PAYG  
Standard Hours: 80.00  
Work Period: B Biweekly

Grade: 055  
Step: Mon Tue Wed Thu Fri Sat Sun

USA  
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 Summary



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

- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

## Lesson 4: Submit Job Data Changes that Impact Benefits

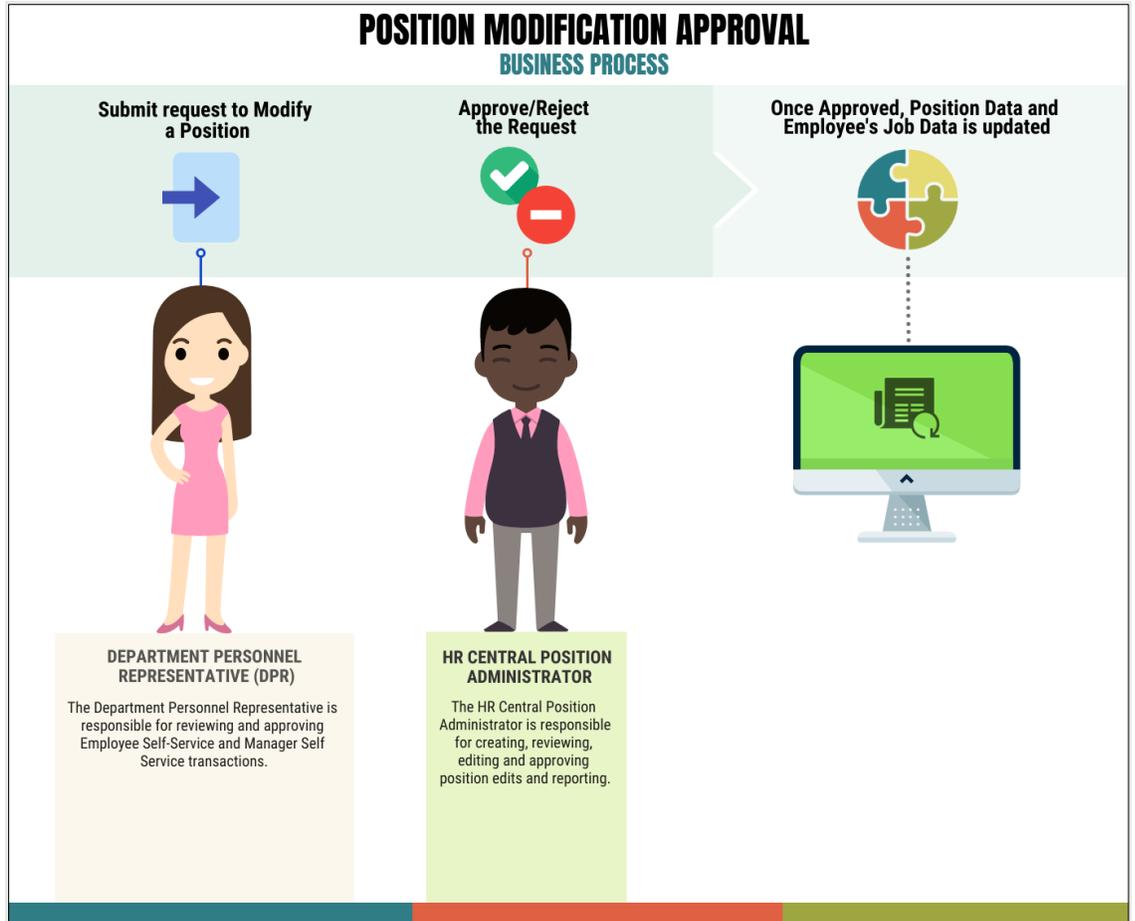
### Lesson 4: Overview

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

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

## Lesson 4: Submit Job Data Changes that Impact Benefits

### Lesson 4: Introduction



## Lesson 4: Submit Job Data Changes that Impact Benefits

### Key Terms



The following key terms are used in this module:

Term	Definition
N/A	N/A

## Lesson 4: Submit Job Data Changes that Impact Benefits

- Lecture 1: This lesson will review Submit Job Data Changes that Impact Benefits:
- Submit Job Data Changes that Impact Benefits
- Update a temporary employee to regular status for them to obtain benefits

## Lesson 4: Submit Job Data 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.

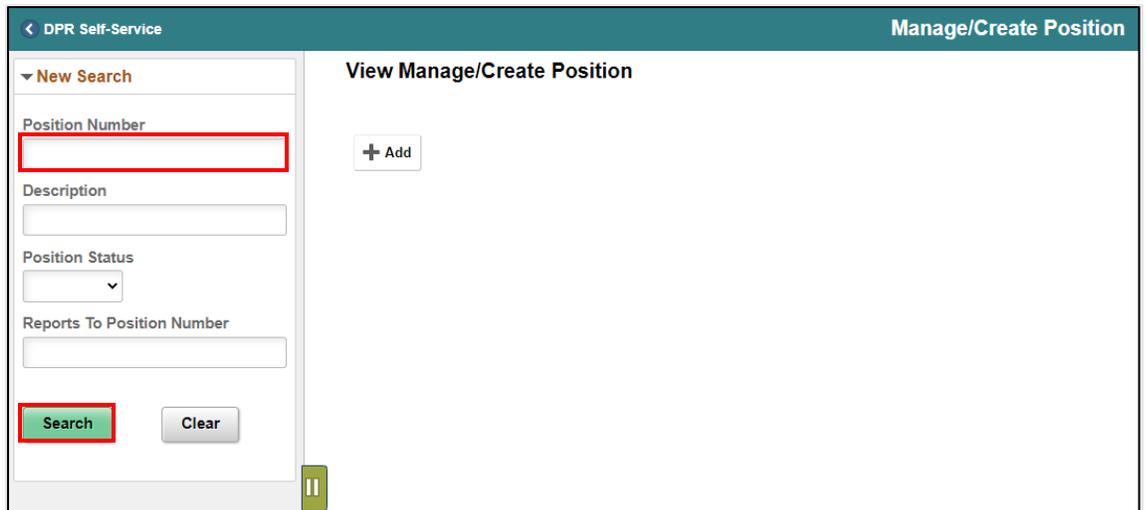
Modifications include:

- 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**.



The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a 'New Search' section with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons, with the 'Search' button also highlighted with a red box. On the right, there is a '+ Add' button. The top right corner of the interface displays 'Manage/Create Position'.

## Lesson 4: Submit Job Data Changes that Impact Benefits

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

The position information is displayed.

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

The screenshot shows the 'View Manage/Create Position' interface. On the left is a search sidebar with filters for Position Number, Description, Position Status, Reports To Position Number, Business Unit, Company, Department, Status, and Job Code. The main area displays '1 results found' and a table with the following data:

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00021632	RECREATION LEADER	00010839	PR	MDC	PR00000000	Active	007301	1/1

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

The screenshot shows the 'Position Details' interface for Position Number 00021632. It includes a 'Clone' button and a table with the following data:

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Parks, Recreation & Open Spcs	PARKS, REC & OPEN SPACES	Recreation Leader	Hickman Building - PR	Approved	Approval Chain

A red box highlights the plus sign (+) icon located above the Effective Date column header.

## Lesson 4: Submit Job Data Changes that Impact Benefits

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

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**.

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**.

## Lesson 4: Submit Job Data Changes that Impact Benefits

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

10. Review the requested modifications and select **Next**.

11. 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**.

Attachments for this process are optional.

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

## Lesson 4: Submit Job Data Changes that Impact Benefits

### 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.

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

**Step 4 of 5: Budget Incumbents**  
Effective Date: 01/24/2022  
Reason Code: FTE - Change from Temp to Reg  
Approval Status: Not Available

**Current Budget**

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

**Incumbents**

Update Incumbents:  Yes  No  
 Include Salary Plan/Grade:  No  
 Force Update for Title Changes:  No

**Current Incumbents**

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Kristy Hobbs	00312190	0	Part-Time	59.00	12/28/2020	Data Change	Conversion	N	Job Data

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.

**Step 5 of 5: Review and Submit**  
Effective Date: 01/24/2022  
Reason Code: FTE - Change from Temp to Reg  
Approval Status: Not Available

**Summary Of Changes**

Description	Proposed Value	Current Value
Reason Code	FTE	CNV
Action Date	2022-01-25	2020-07-28
Regular/Temporary	R	T
Full/Part Time	F	P
FTE	1	0

## Lesson 4: Submit Job Data Changes that Impact Benefits

### 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.

The screenshot displays the 'Position Confirmation' interface. At the top, a green banner with a checkmark icon states: 'The Position Number 00021632 has been successfully submitted for approval.' Below this, the main content area is titled 'Modify Position Approval'. It features a dropdown menu currently set to 'Change from Temp to Reg' and a status indicator 'Pending'. A red rectangular box highlights a section containing the title 'Modify Position Approval', a clock icon followed by the word 'Pending', and a list of 'Multiple Approvers' including 'HR Central Position Approver' with a right-pointing arrow. At the bottom of the screen, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

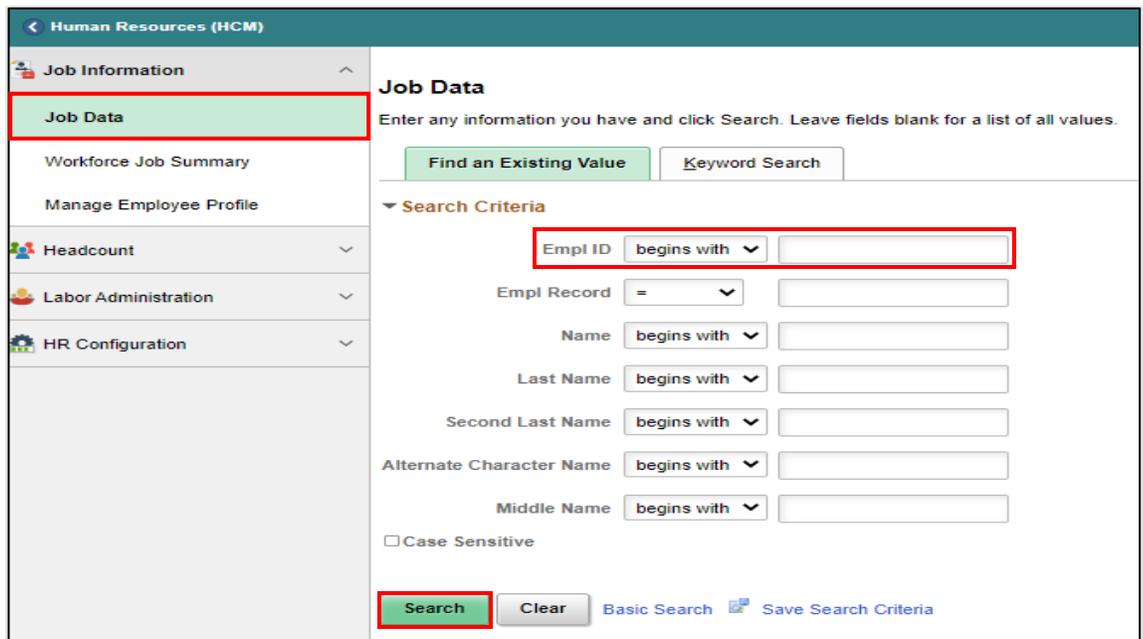
## Lesson 4: Submit Job Data Changes that Impact Benefits

### 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**.



**Human Resources (HCM)**

**Job Information**

- Job Data** (Selected)
- Workforce Job Summary
- Manage Employee Profile

**Headcount**

**Labor Administration**

**HR Configuration**

**Job Data**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | **Keyword Search**

**Search Criteria**

**Empl ID** begins with [ ]

**Empl Record** = [ ]

**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.

## Lesson 4: Submit Job Data Changes that Impact Benefits

### 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**.

**Human Resources (HCM) HR Administration**

Job Information | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

**Job Data**

Kristy Hobbs Employee | Empl ID 00312190 | Empl Record 0

**Job Information Details**

Effective Date: 01/24/2022 | Effective Sequence: 1 | HR Status: Active | Payroll Status: Active | Action: Position Change | Reason: Change from Temp to Reg

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**

Standard Hours	80.00	Work Period	B	Biweekly
FTE	1.000000	<input type="checkbox"/> Adds to FTE Actual Count? <input type="checkbox"/> Encumbrance Override		

**Contract Number**

Contract Type

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

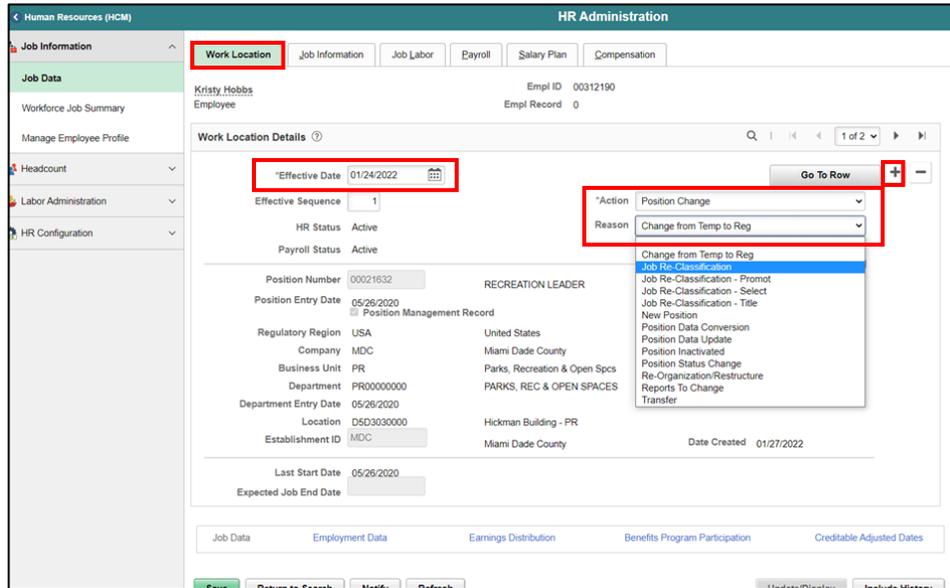
## Lesson 4: Submit Job Data Changes that Impact Benefits

**Lecture 1:**

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

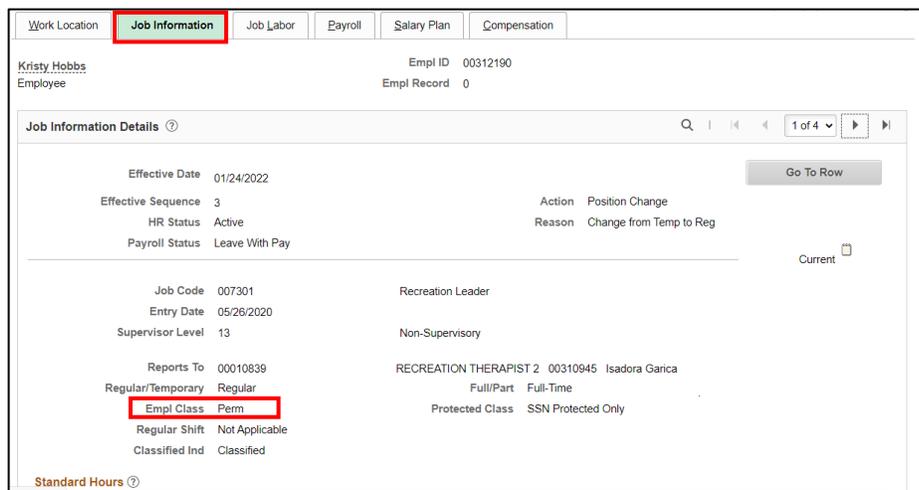
**Submit Job Data Changes that Impact Benefits**

5. Select the **Work Location** tab.
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**.



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

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



## Lesson 4: Submit Job Data Changes that Impact Benefits

### 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

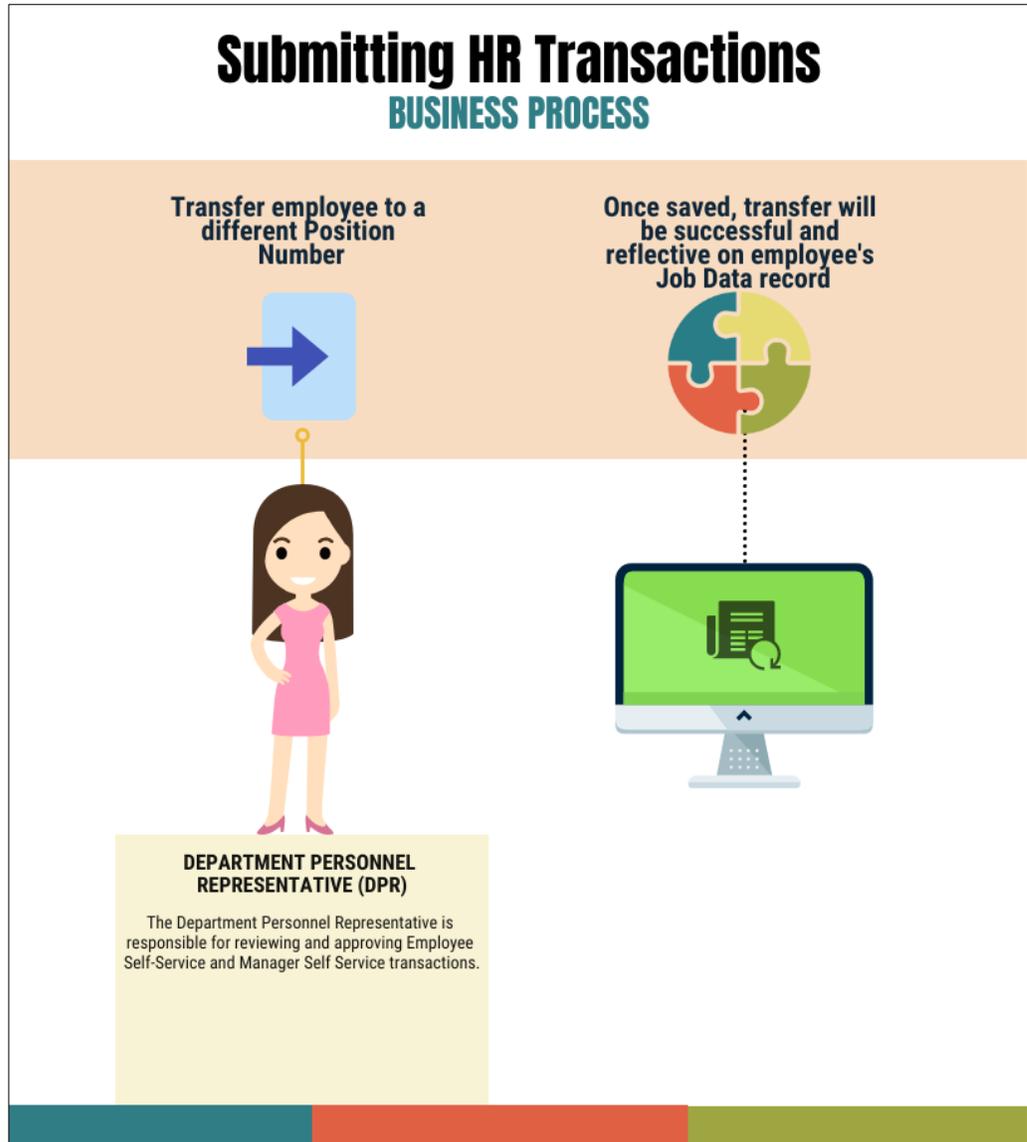
### Lesson 5: Overview

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

- Successfully transfer employees to another Position Number.
- Verify the transfer within the Job Data.

## Lesson 5: Submitting HR Transaction

### Lesson 5: Introduction



## Lesson 5: Submitting HR Transaction

### Key Terms



The following key terms are used in this module:

Term	Definition
N/A	N/A

## Lesson 5: Submitting HR Transaction

### Lesson 5: Submitting HR Transaction

This lesson will review Submitting HR Transaction:

- Transfer employee to a lateral position.

## Lesson 5: Submitting HR Transaction

### Lecture 1: Transfer Employee to a Position (Lateral)

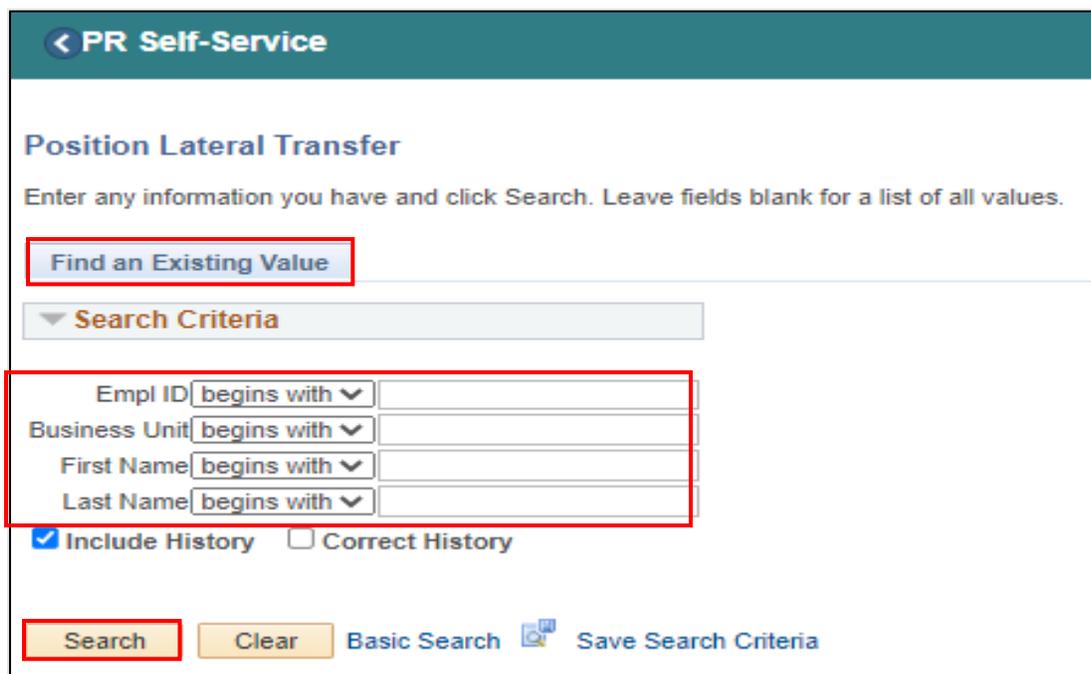
Transfer Employee to a different Position Number (Lateral) allows a user to transfer an employee within the same Department and Job Code to a different Position within the Business Unit (exclusively).

**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**

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**.



The screenshot shows the 'PR Self-Service' interface for 'Position Lateral Transfer'. The page title is 'Position Lateral Transfer' and it includes the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A red box highlights the 'Find an Existing Value' button. Below it is a 'Search Criteria' section with four dropdown menus: 'Empl ID begins with', 'Business Unit begins with', 'First Name begins with', and 'Last Name begins with'. A red box also highlights these four dropdown menus. At the bottom of the search criteria section, there are two checkboxes: 'Include History' (checked) and 'Correct History' (unchecked). At the bottom of the form, there are four buttons: 'Search' (highlighted with a red box), 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.

## Lesson 5: Submitting HR Transaction

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 1 of 1 Last

Effective Date	11/16/2021	Seq	0
Action	XFR	Transfer	
*Position Number	00003262		

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**.

**PR Self-Service**

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	Seq	1
Action	XFR	Transfer	
*Position Number			

Effective Date	11/16/2021	Seq	0
Action	XFR	Transfer	
Position Number	00003262		HR PERSONNEL SERVICES SPEC

## Lesson 5: Submitting HR Transaction

Lecture 2:  
Verify  
Employee  
Transfer  
(Lateral)

Verifying the Employee’s Transfer (Lateral).

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.**
2. Select **Search.**

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

Work Location Details		1 of 4
Effective Date	11/16/2021	Go To Row
Effective Sequence	0	
HR Status	Active	Action Transfer Reason
Payroll Status	Active	Current
Position Number	00003262	HR PERSONNEL SERVICES SPEC
Position Entry Date	11/16/2021	<input type="checkbox"/> Position Management 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 11/16/2021
Last Start Date	10/28/1996	
Expected Job End Date		

## Lesson 5: Submitting HR Transaction

### 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

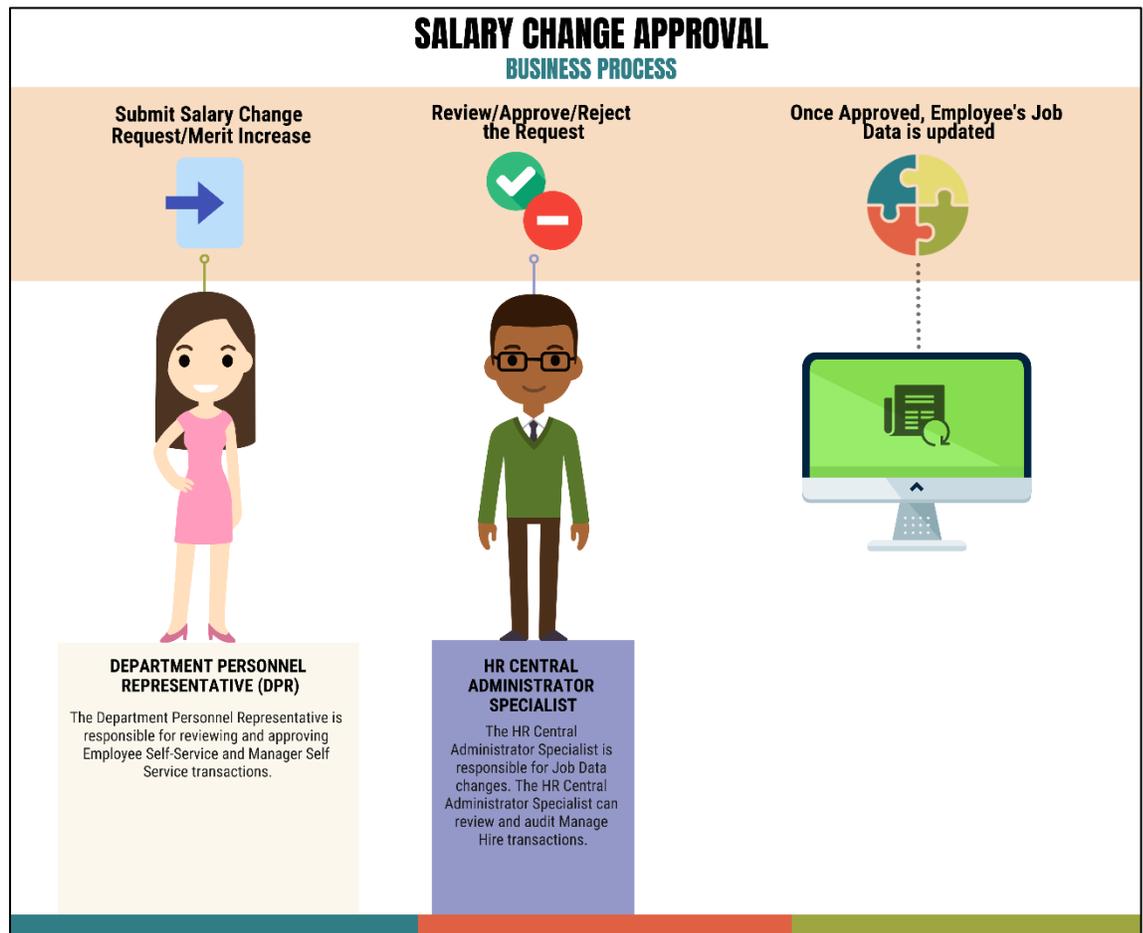
### Lesson 6: Overview

At the conclusion of this lesson, you will 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 6: Submitting HR Salary Changes

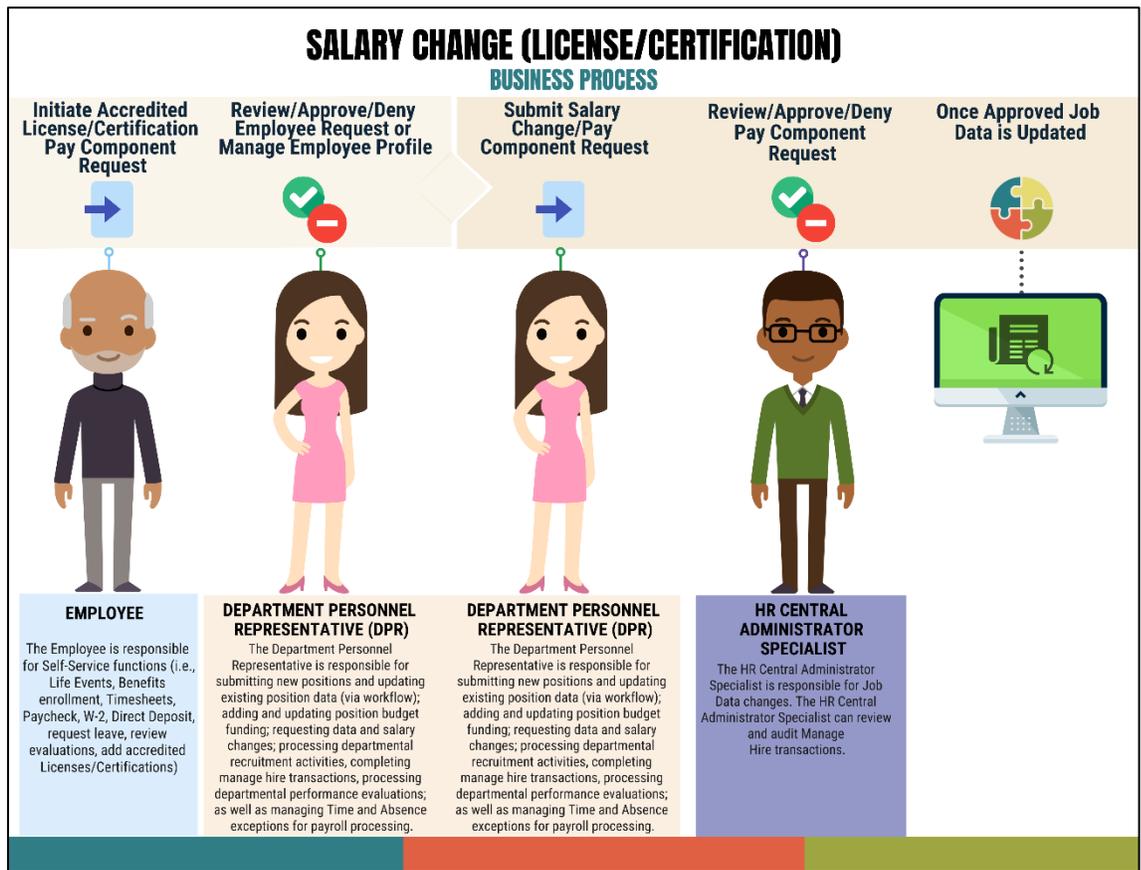
### Lesson 6: Introduction



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

### Lesson 6: Introduction



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: Submitting HR Salary Changes

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Components of Pay</b>	Additional elements of pay added to the employee’s compensation. Components can be added or removed based on operational need.

## Lesson 6: Submitting HR Salary Changes

### Lecture 1: Merit Increase (Salary Grade)

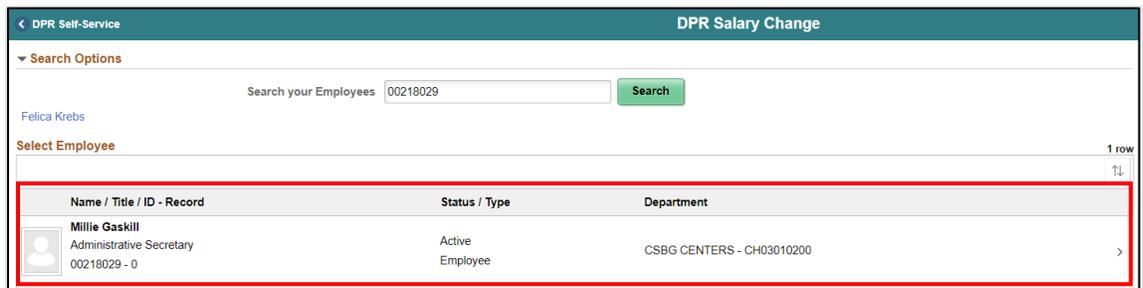
Submitting Merit Increase for a Salary Grade employee.

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

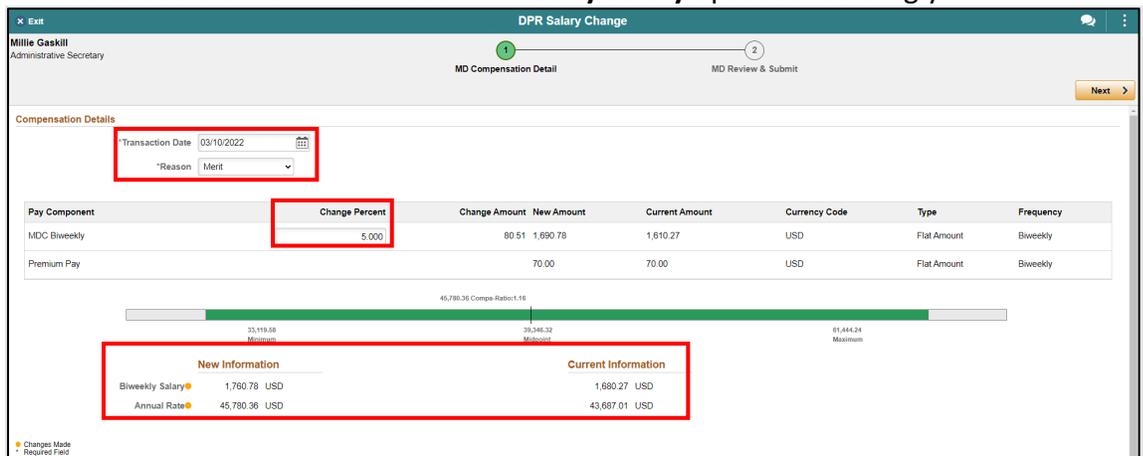
1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter either the **Employee’s Name or Employee ID #**.
3. Select **Search**.



4. Select the **Employee’s Record**.



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.



## Lesson 6: Submitting HR Salary Changes

### 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**.

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly	5.000	80.51	1,690.78	1,610.27	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

New Information		Current Information	
Biweekly Salary	1,780.78 USD	Biweekly Salary	1,680.27 USD
Annual Rate	45,780.36 USD	Annual Rate	43,687.01 USD

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	MDBKLY	0	1,690.78/USD	B		
2	PRMPAY	0	70.00/USD	B		

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.

Transaction Date: 03/10/2022  
Reason: Merit

New Information		Current Information	
Biweekly Salary	1,780.78 USD	Biweekly Salary	1,680.27 USD
Annual Rate	45,780.36 USD	Annual Rate	43,687.01 USD

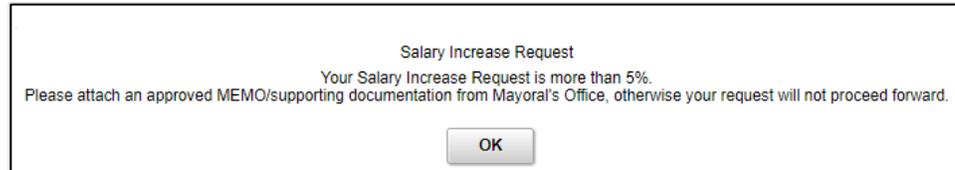
Comments: requesting 5% Merit Increase effective 3/10/2022

Attachments: No documents have been attached. [Add Attachment](#)

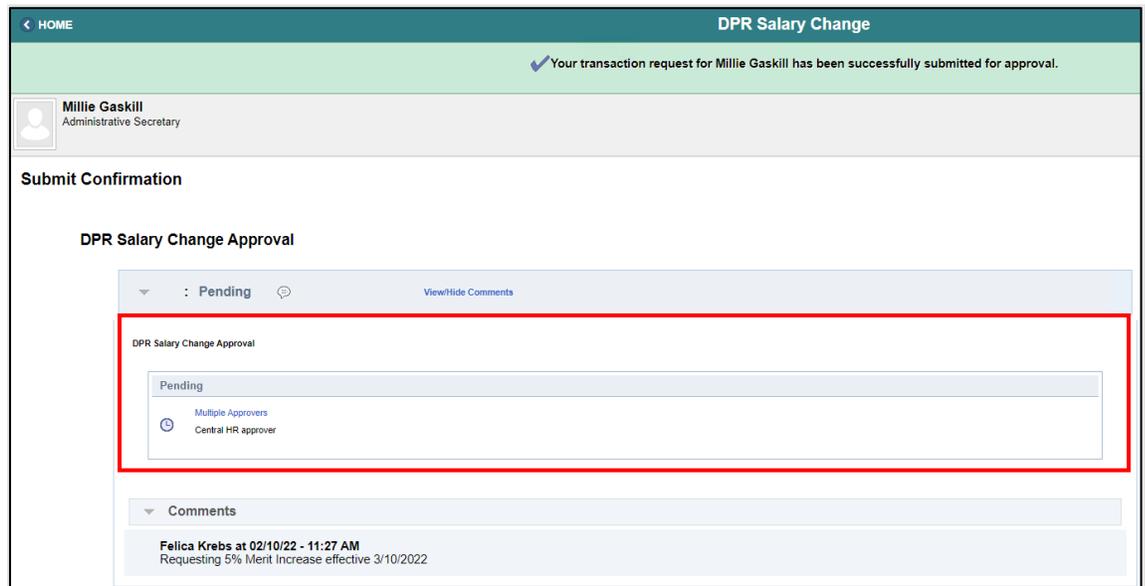
## Lesson 6: Submitting HR Salary Changes

### 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.



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



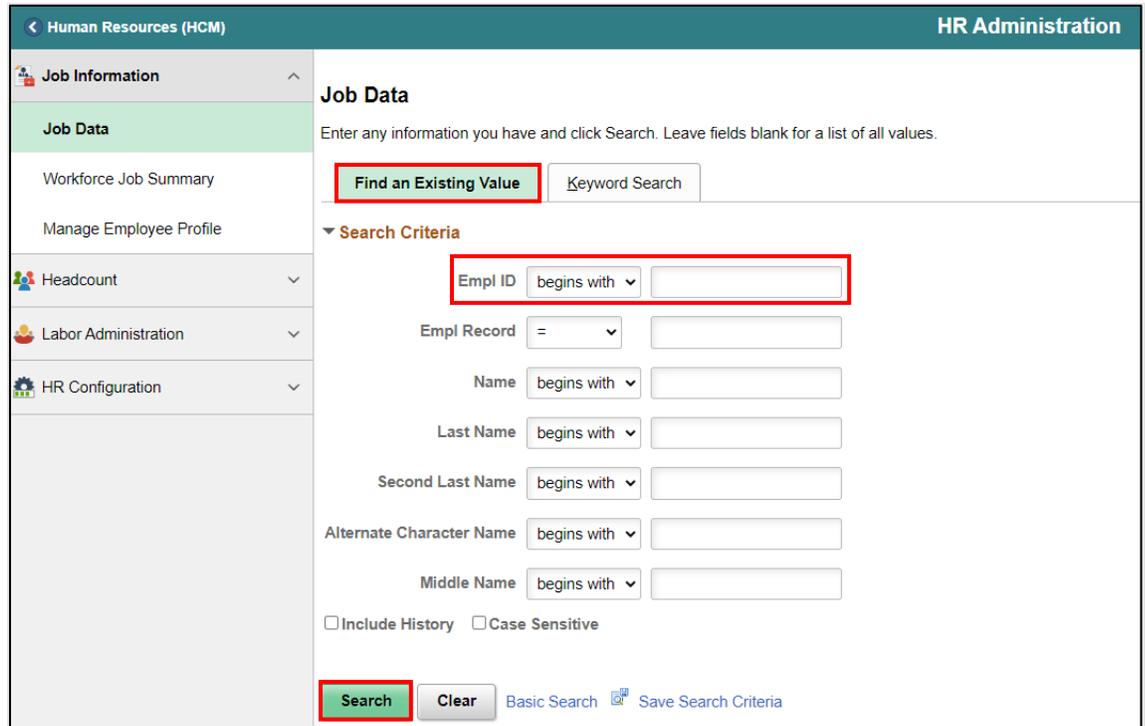
## Lesson 6: Submitting HR Salary Changes

### 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**.



The screenshot shows the 'Job Data' search interface in the HR Administration section. The left sidebar contains navigation options: Job Information (expanded), Job Data (selected), Workforce Job Summary, Manage Employee Profile, Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Keyword Search'. Below the tabs is a 'Search Criteria' section with several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a text input field, highlighted with a red box), 'Empl Record' (with an equals sign dropdown and a text input field), 'Name' (with a dropdown set to 'begins with' and a text input field), 'Last Name' (with a dropdown set to 'begins with' and a text input field), 'Second Last Name' (with a dropdown set to 'begins with' and a text input field), 'Alternate Character Name' (with a dropdown set to 'begins with' and a text input field), and 'Middle Name' (with a dropdown set to 'begins with' and a text input field). At the bottom of the search criteria are two checkboxes: 'Include History' and 'Case Sensitive'. At the bottom of the page are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Basic Search' (with a magnifying glass icon). To the right of the 'Basic Search' button is a link 'Save Search Criteria' with a document icon.

## Lesson 6: Submitting HR Salary Changes

### 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**.

The screenshot shows the 'Salary Plan Details' for employee Millie Gaskill (Empl ID: 00218029). The 'Salary Plan' tab is selected. The record shown is '1 of 2'. The effective date is 03/10/2022, and the status is 'Future'. The record details include: Effective Date: 03/10/2022, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, Action: Pay Rate Change, Reason: Merit. The salary admin plan is K (GSAF - OPEIU Local 100), grade is A01, and step is A01. The grade entry date is 02/26/2007 and the step entry date is also 02/26/2007. A 'Future' label with a calendar icon is visible on the right side of the record details.

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.

The screenshot shows the 'Salary Plan Details' for employee Millie Gaskill (Empl ID: 00218029). The 'Salary Plan' tab is selected. The record shown is '2 of 2'. The effective date is 01/31/2022, and the status is 'Current'. The record details include: Effective Date: 01/31/2022, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, Action: Pay Rate Change, Reason: Merit. The salary admin plan is K (GSAF - OPEIU Local 100), grade is A01, and step is A01. The grade entry date is 02/26/2007 and the step entry date is also 02/26/2007. A 'Current' label with a calendar icon is visible on the right side of the record details.

## Lesson 6: Submitting HR Salary Changes

### 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 Empl ID 00218029  
Employee Empl Record 0

Compensation Details
1 of 2

Effective Date 03/10/2022

Action Pay Rate Change  
Reason Merit

Future

Compensation Rate 1,760.78 USD Frequency B Biweekly

▶ Comparative Information

▶ Pay Rates

Default Pay Components Contract Change Prorate Option

Pay Components
1-2 of 2

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,690.782975	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

## Lesson 6: Submitting HR Salary Changes

### Lecture 1: Merit Increase (Salary Grade)

Record **2 of 2**

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

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Millie Gaskill  
Employee
Empl ID 00218029  
Empl Record 0

Compensation Details ?
2 of 2

**Effective Date** 01/31/2022

**Action** Pay Rate Change  
**Reason** Merit

Go To Row

**Compensation Rate** 1,680.27 USD

**Frequency** B Biweekly

Current

▶ Comparative Information ?

▶ Pay Rates ?

Default Pay Components

Contract Change Prorate Option

Pay Components ?

1-2 of 2

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

## Lesson 6: Submitting HR Salary Changes

### Lecture 2: Merit Increase (Salary Step)

Submitting Merit Increase for a Salary Step.

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 **Employee Name or Employee ID #**.
3. Select **Search**.

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

Name / Title / ID - Record	Status / Type	Department
<b>Offr Doty</b> Police Records Tech 3 00014872 - 0	Active Employee	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**.

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,057.74	2,057.74	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

New Information		Current Information	
Biweekly Salary	2,127.74 USD	Biweekly Salary	2,127.74 USD
Annual Rate	55,321.24 USD	Annual Rate	55,321.24 USD

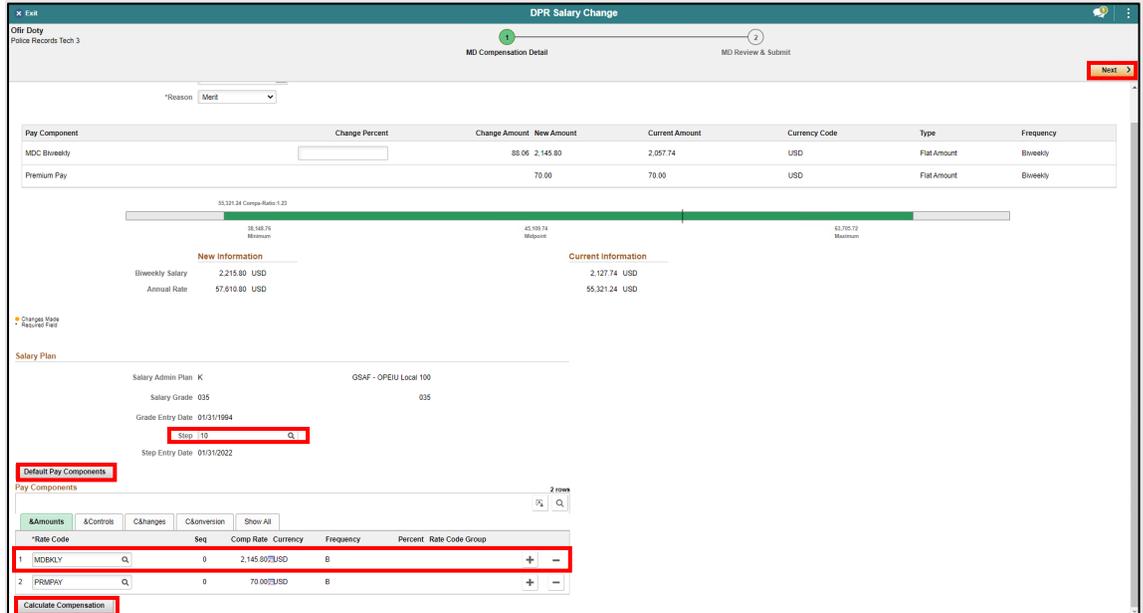
  

Salary Plan	
Salary Admin Plan	K
Salary Grade	035
Grade Entry Date	01/31/1994
Step	10
Step Entry Date	01/31/2022

## Lesson 6: Submitting HR Salary Changes

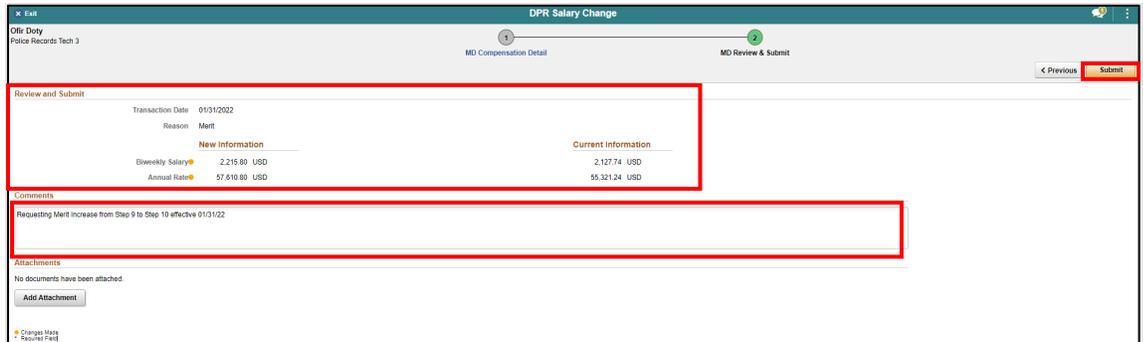
### Lecture 2: Merit Increase (Salary Step)

8. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate. 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**.



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**.

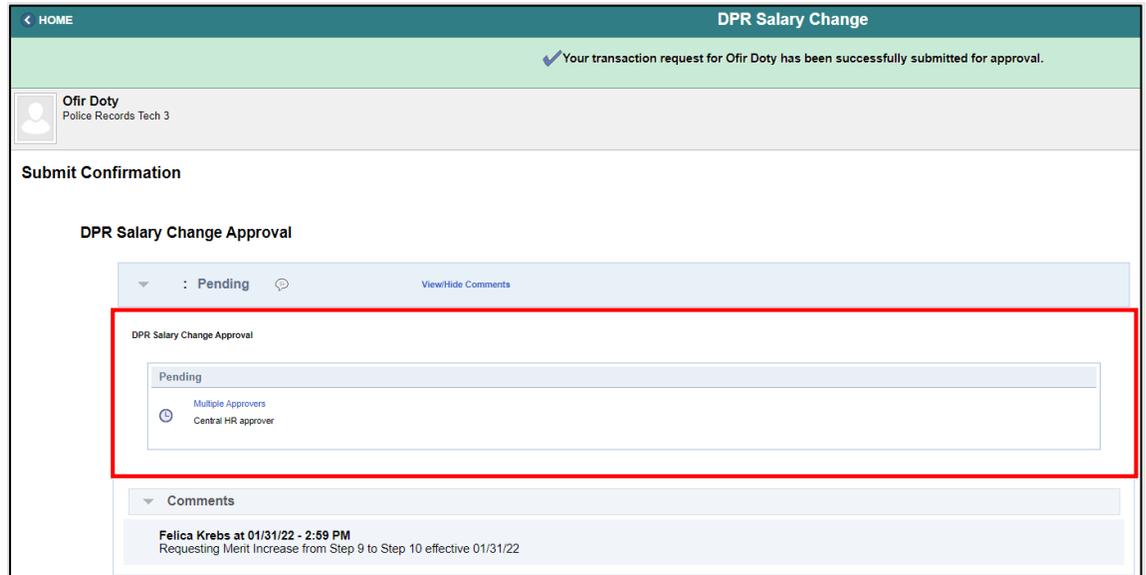
11. In the **Comments** section enter a brief description of the request. (Optional) Select **Add Attachment** to add any documents.
12. Select **Submit** once ready for processing.



## Lesson 6: Submitting HR Salary Changes

### 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.



## Lesson 6: Submitting HR Salary Changes

### Lecture 3: Pay Components (Pay Supplements)

#### Requesting Pay Components (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)

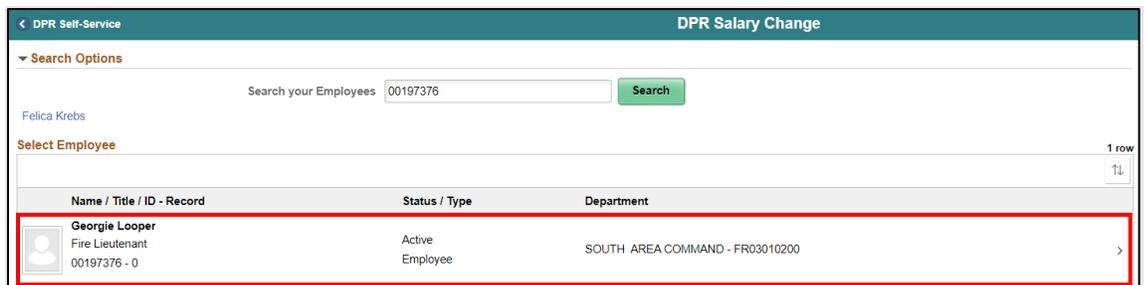
Requesting pay components for an employee.

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

1. 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**.



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



## Lesson 6: Submitting HR Salary Changes

### 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**.

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Education Incentive Pay		155.78	155.78	155.78	USD	Flat Amount	Biweekly
Fire - B A		50.77	50.77	50.77	USD	Flat Amount	Biweekly
Fire Paramedic (Protocol Cert)		24,000	24,000	24,000	%	Percent	Biweekly
Fire Hazardous		125.00	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:1.63

New Information		Current Information	
Biweekly Salary	4,407.46 USD	Biweekly	4,407.46 USD
Annual Rate	114,593.86 USD	Annual Rate	114,593.86 USD

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.

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 EDINCP	0	155.78	USD	B		
2	1					
3 FIRBA	0	50.77	USD	B		
4 FIRPRM	0	819.04	USD	B	24.000	MDCMAX
5 HZDFIR	0	125.00	USD	B		
6 MDBKLY	0	3,256.87	USD	B		

**Calculate Compensation**

## Lesson 6: Submitting HR Salary Changes

### Lecture 3: Pay Components (Pay Supplements)

An available list of **Pay Components** related to the Classification is displayed. This pop-up 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.

Comp Rate Code	Description	Comp Base Pay Switch	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 - Training	Y	Percent	PERCEN
<b>LEAD</b>	<b>Leadworker</b>	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
DPR Salary Change
MD Compensation Detail
MD Review & Submit

**New Information**

Biweekly Salary	4,600.61 USD	Current Information	4,407.46 USD
Annual Rate	119,615.88 USD		114,593.86 USD

**Salary Plan**

Salary Admin Plan: C      IAFF Local 1403 - Firefighters

Salary Grade: 004      004

Grade Entry Date: 10/20/2003

Step: 9

Step Entry Date: 10/20/2003

**Default Pay Components**

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
EDINCP	0	155.78	USD	B		
FIRBA	0	50.77	USD	B		
FIRPRM	0	856.42	USD	B	24,000	MDCMAX
HZDFIR	0	125.00	USD	B		
<b>LEAD</b>	0	155.77	USD	B		
MDBKLY	0	3,256.67	USD	B		

Next >

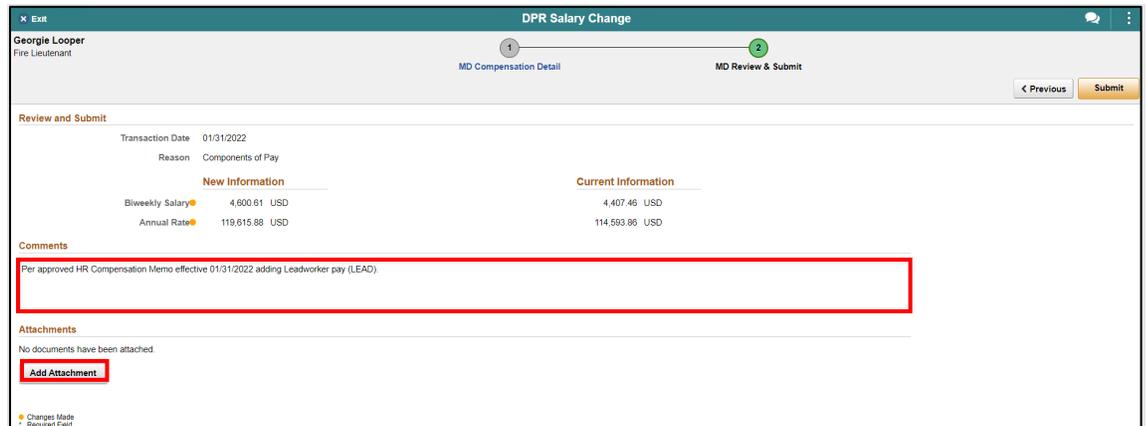
## Lesson 6: Submitting HR Salary Changes

### Lecture 3: Pay Components (Pay Supplements)

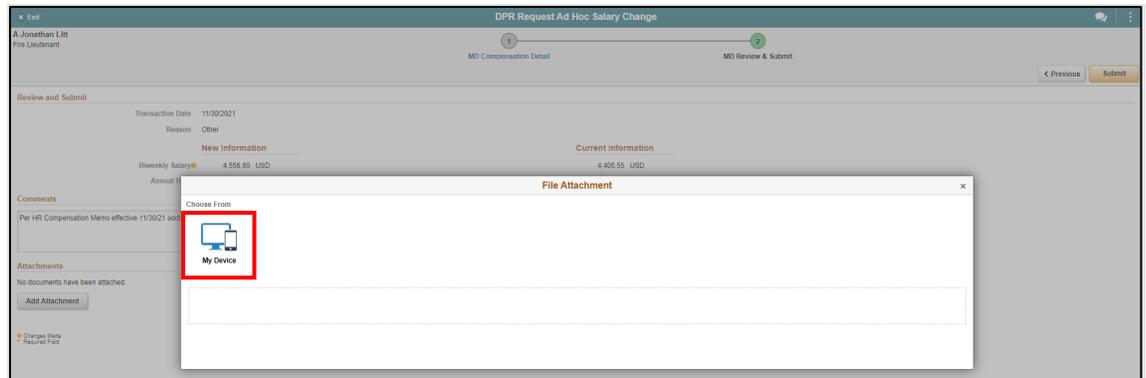
14. In the **Comments** section, enter a brief description of the request.

**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.



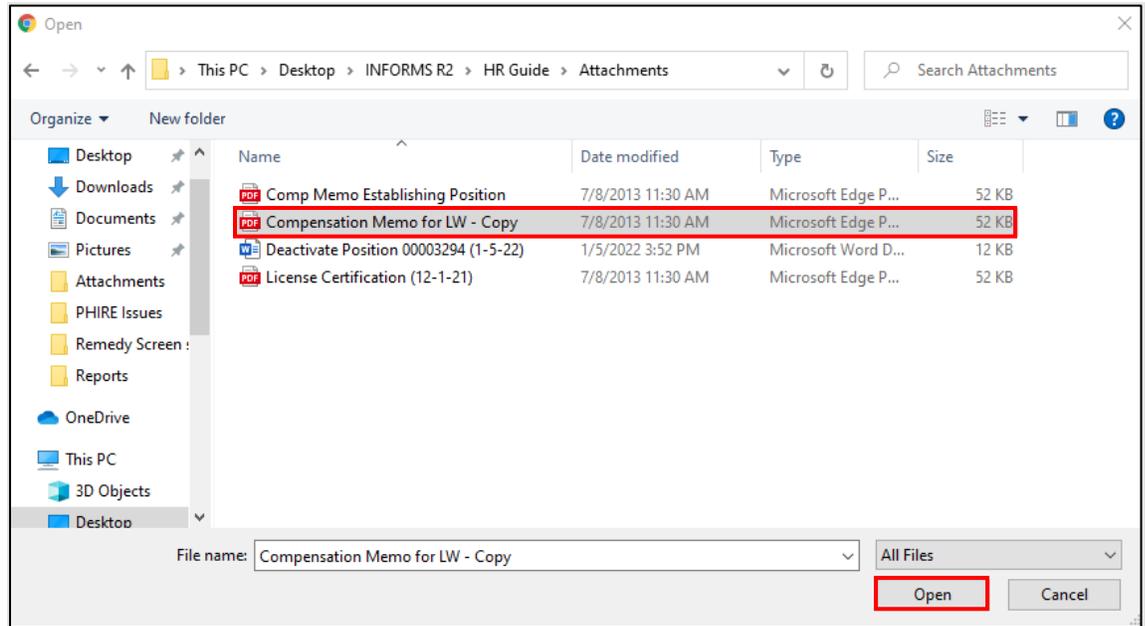
16. Select **My Device**.



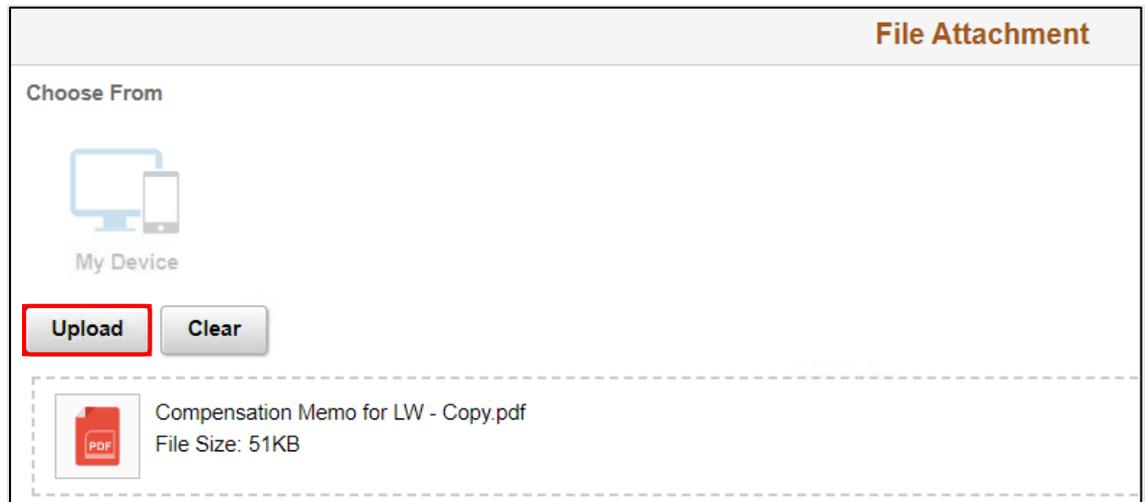
## Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

- 17. Locate and select the documentation.
- 18. Select **Open**.



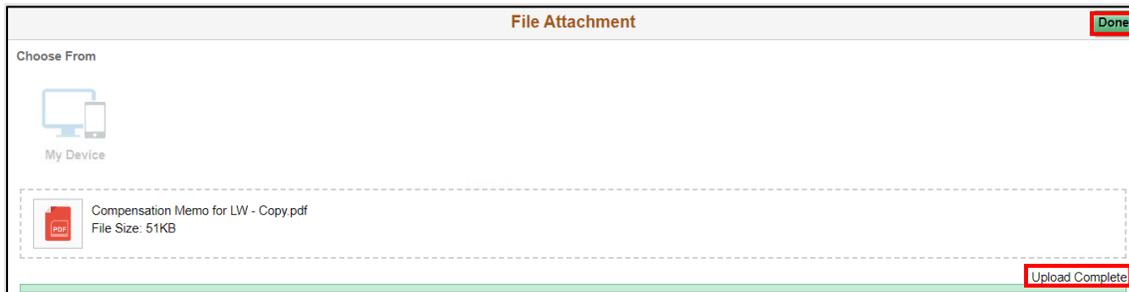
- 19. Select **Upload**.



## Lesson 6: Submitting HR Salary Changes

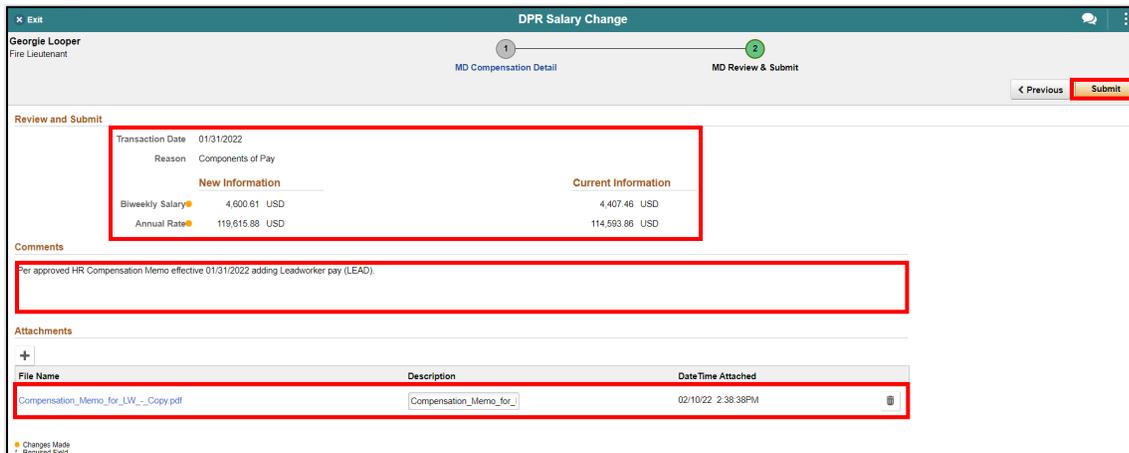
Lecture 3: Pay Components (Pay Supplements)

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

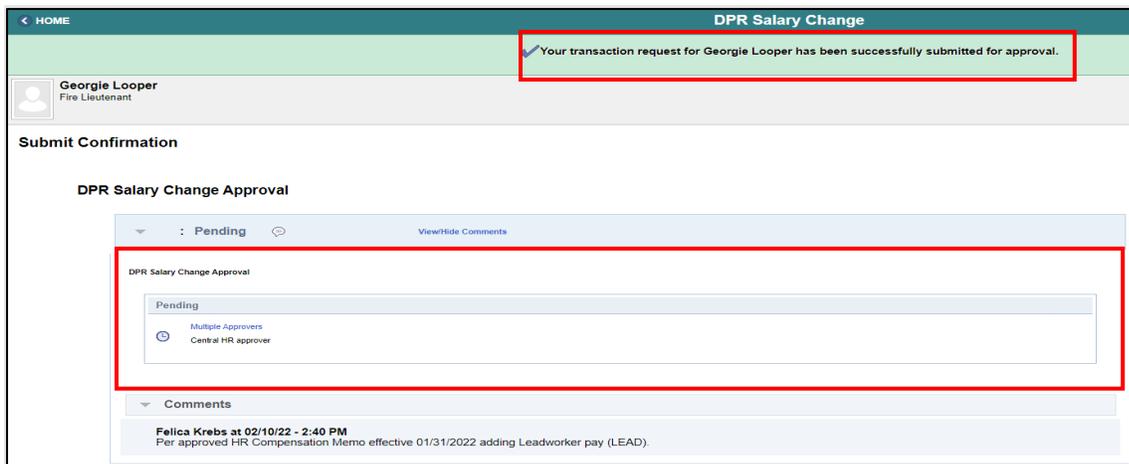


21. Review the adjustments accordingly. Notice the **Transaction Date, Reason, the New Biweekly Salary Information versus the Current Information Biweekly Salary Information, Comments, and Attachments**.

22. Select **Submit** once ready to submit the request.



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



## Lesson 6: Submitting HR Salary Changes

### Lecture 4: Pay Components (Licenses/Certifications)

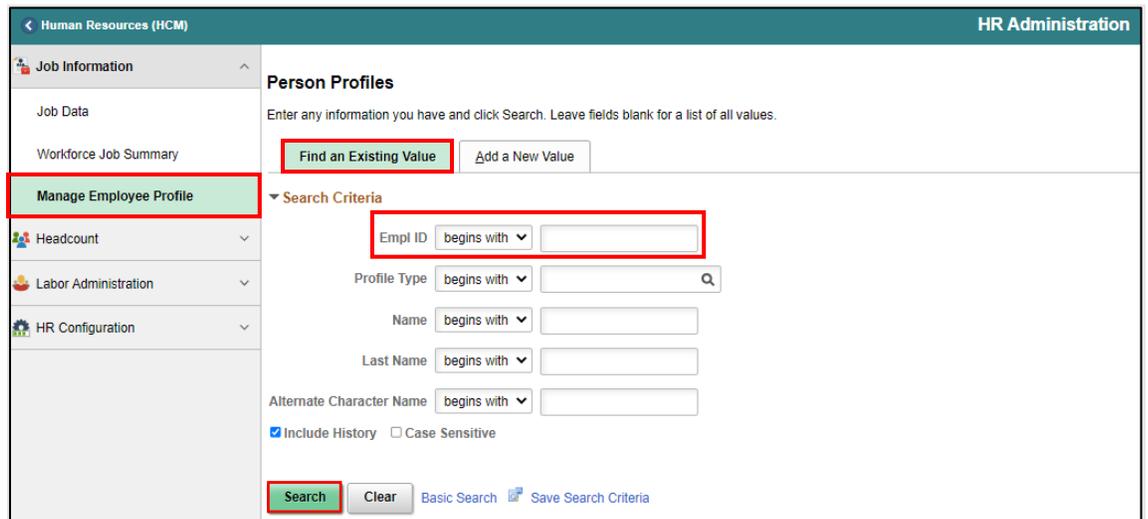
The employee can submit a request to add a License or Certification via Employee Self-Service. The DPR then reviews and ensures all proper, active documents are enclosed and request the salary change to add the License/Certification pay.

**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**.



The screenshot displays the 'Manage Employee Profile' search interface. The left sidebar shows the navigation menu with 'Manage Employee Profile' highlighted. The main content area is titled 'Person Profiles' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search criteria section includes dropdown menus for 'Empl ID', 'Profile Type', 'Name', 'Last Name', and 'Alternate Character Name', each followed by a text input field. The 'Empl ID' field is highlighted with a red box. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

## Lesson 6: Submitting HR Salary Changes

### 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.

The screenshot displays the 'Person Profile' page in the HR Administration system. The left sidebar shows navigation options like 'Job Information', 'Headcount', and 'Labor Administration'. The main content area shows the profile for 'Kaylani O'leary' with details such as Empl ID (00219546) and Profile Type (PERSON). The 'Qualifications' tab is selected and highlighted with a red box. Below this, there are sections for 'Honors and Awards', 'Language Skills', 'Licenses and Certifications', 'Memberships', and 'Competencies'. Each section contains a message stating 'There are currently no [category] for this profile. Please add one if required.' and a '+ Add New [category]' link. The 'Add New Licenses and Certifications' link is highlighted with a red box. At the bottom, there are 'Save', 'Return to Search', and 'Add' buttons.

## Lesson 6: Submitting HR Salary Changes

### Lecture 4: Pay Components (Licenses/Certifications)

The **Person Profile** pop-up page is displayed.

6. In the **\*Issue Date** field, enter the **issue date of the license/certification**.
7. In the **\*License** field, select the **magnifying glass to search for the qualified license/certification**.
8. 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 Certifications

Empl ID 00219546

Profile Type PERSON

Kaylani Oleary

Person

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details
1 of 1
View All

\*Issue Date

\*License  Cert Public Purchasing Officer

Country  United States

State  Florida

License Verified

Expiration Date

License/Certification Number  246 characters remaining

Issued By  196 characters remaining

+

OK

Cancel

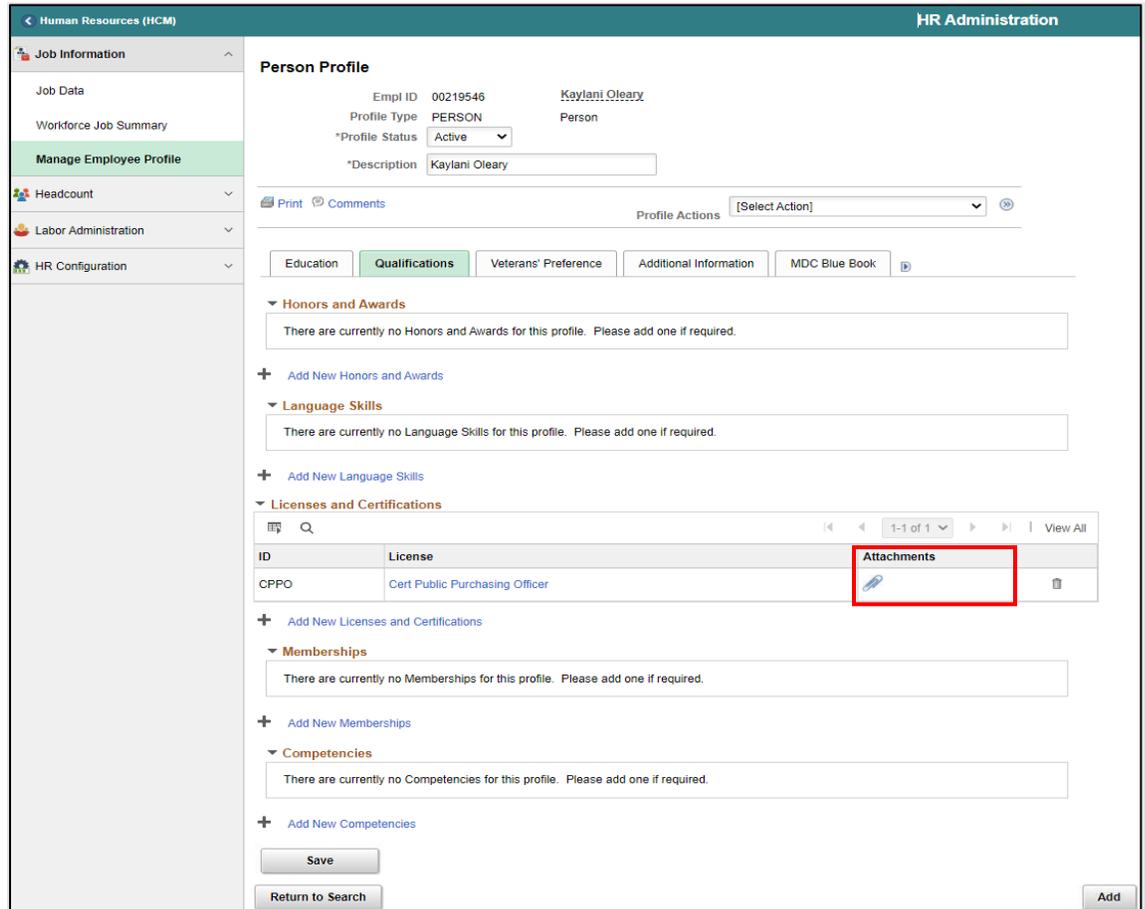
Apply and Add Another

## Lesson 6: Submitting HR Salary Changes

### 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.



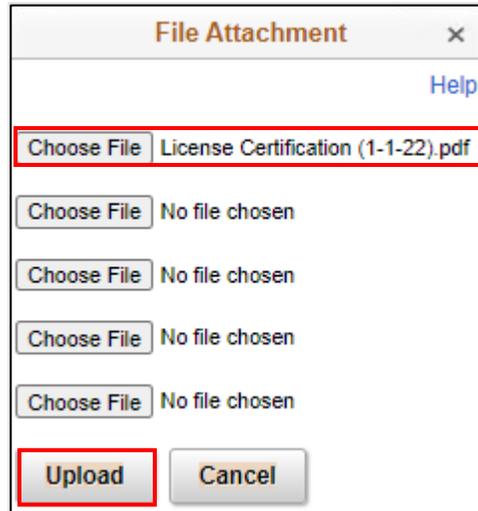
16. Select **Add Attachment** to enclose the license/certification documentation.



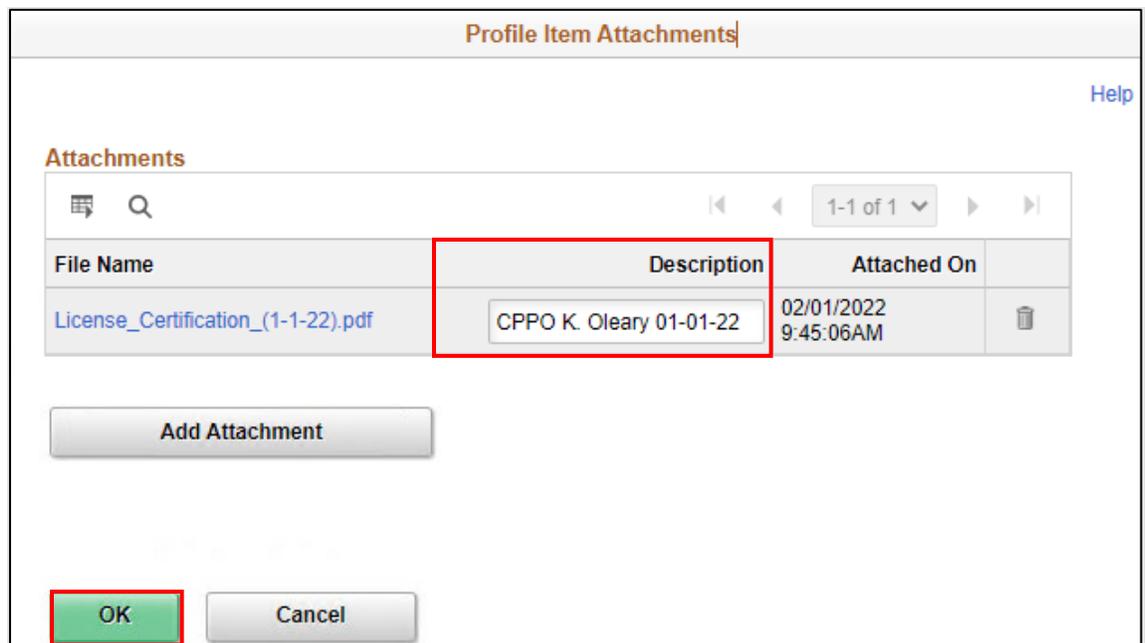
## Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

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



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



## Lesson 6: Submitting HR Salary Changes

### Lecture 4: Pay Components (Licenses/Certifications)

21. Once all supporting documentation is enclosed, select **Save**.

**Person Profile**

Empl ID: 00219546    Kaylani O'leary  
 Profile Type: PERSON    Person  
 \*Profile Status: Active  
 \*Description: Kaylani O'leary

Print    Comments    Profile Actions: [Select Action]

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**  
 There are currently no Language Skills for this profile. Please add one if required.  
 + Add New Language Skills

**Licenses and Certifications**

ID	License	Attachments
CPPO	Cert Public Purchasing Officer	

+ Add New Licenses and Certifications

**Memberships**  
 There are currently no Memberships for this profile. Please add one if required.  
 + Add New Memberships

**Competencies**  
 There are currently no Competencies for this profile. Please add one if required.  
 + Add New Competencies

**Save**    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**.

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

Name / Title / ID - Record	Status / Type	Department
 <b>Kaylani Oleary</b> Procurement Contracting Ofc 1 00219546 - 0	Active Employee	PROCUREMENT - ID08010000

## Lesson 6: Submitting HR Salary Changes

### Lecture 4: Pay Components (Licenses/Certifications)

- 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.

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

**Compensation Details**

\*Transaction Date: 01/10/2022  
 Reason: Components of Pay

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,674.10	2,674.10	USD	Flat Amount	Biweekly
Platinum Pay			70.00	70.00	USD	Flat Amount	Biweekly

**Salary Plan**

Salary Admin Plan: 039AF - OPEU Local 100  
 Salary Grade: 100  
 Grade Entry Date: 05/11/2007  
 Step: 8  
 Step Entry Date: 05/11/2007

**Pay Components**

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
MDCBLY	0	2,674.10/USD	B			
PRPLPAY	0	70.00/USD	B			
	0					

Calculate Compensation

## Lesson 6: Submitting HR Salary Changes

### 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	Comp Base Pay Switch	Rate Code Type	Rate Code Class
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

## Lesson 6: Submitting HR Salary Changes

### Lecture 4: Pay Components (Licenses/Certifications)

Notice the License/Certification Rate code is now added.

10. Select **Default Pay Components**.

11. Select **Calculate Compensation**.

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

12. Select **Next**.

The screenshot displays the 'DPR Salary Change' application window for Kaylin Cleary. The interface includes a progress bar at the top with steps for 'MO Compensation Detail' and 'MO Review & Submit'. A 'Next' button is highlighted in red in the top right corner.

**Compensation Details:**

- Transaction Date: 01/10/2022
- Reason: Components of Pay

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,874.10	2,874.10	USD	Flat Amount	Biweekly
Purchasing O' Contract Prose		131.94	131.94		USD	Flat Amount	Biweekly
Premium Pay		70.00		70.00	USD	Flat Amount	Biweekly

**Salary Plan:**

- Salary Admin Plan: K
- Salary Grade: 108
- Grade Entry Date: 08/11/2007
- Step: 8
- Step Entry Date: 08/11/2007

**Default Pay Components:** (This section is highlighted with a red box)

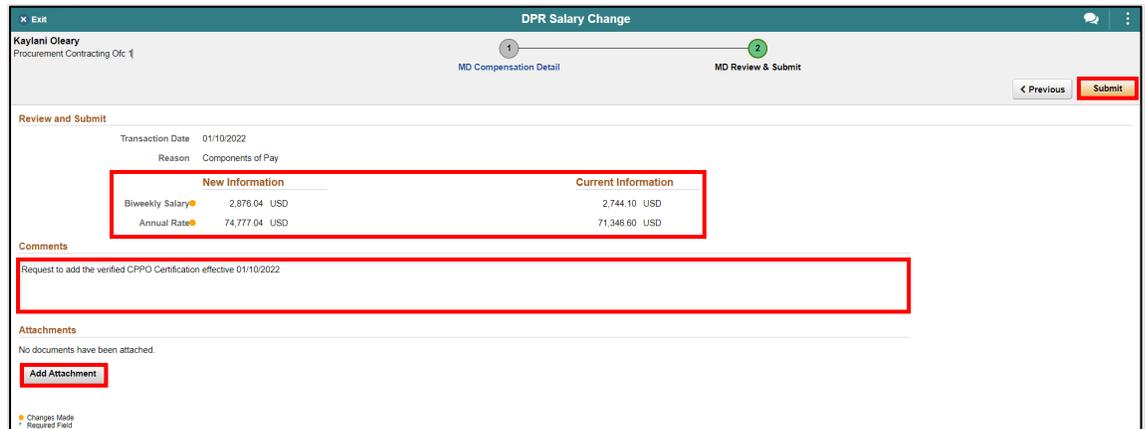
*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
MDCBLY	0	2,874.10	USD	B		
PRCHCT	0	131.94	USD	B		
PRUPAY	0	70.00	USD	B		

**Calculate Compensation:** (This button is highlighted with a red box)

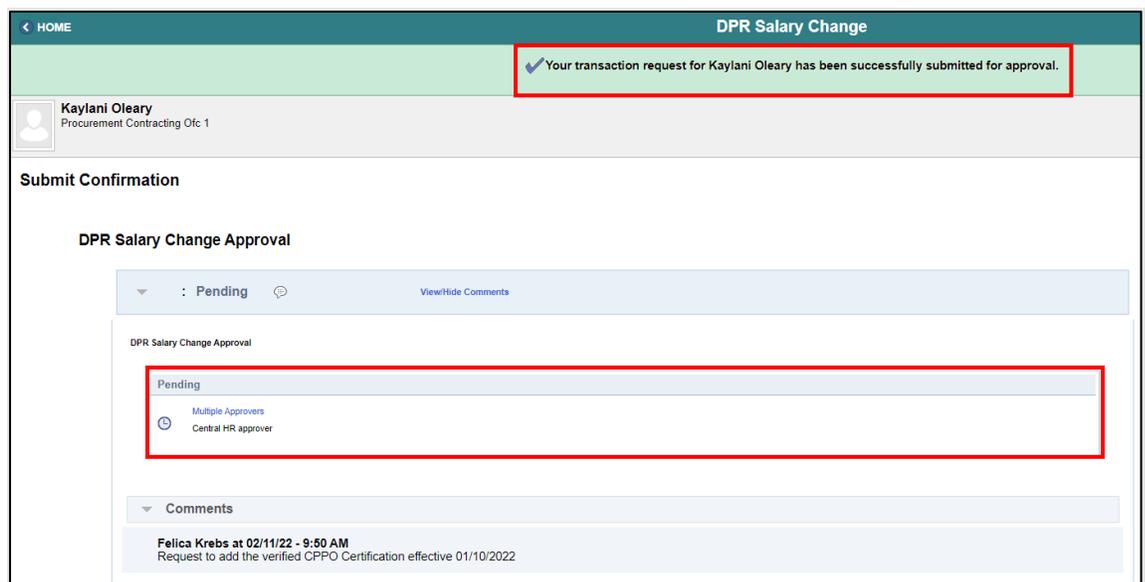
## Lesson 6: Submitting HR Salary Changes

### 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**.



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



## Lesson 6: Submitting HR Salary Changes

### 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**.
3. Select **Search**.

The screenshot shows the 'Job Data' search interface within the 'HR Administration' section of the 'Human Resources (HCM)' system. The left sidebar contains a menu with 'Job Data' highlighted. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two search options: 'Find an Existing Value' (highlighted) and 'Keyword Search'. Under the 'Search Criteria' section, several search fields are listed, with 'Empl ID' (beginning with a dropdown) highlighted. Other fields include 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown and an input field. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a 'Search' button (highlighted) along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.

## Lesson 6: Submitting HR Salary Changes

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.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Claudette Mclean Employee
Empl ID 00218029  
Empl Record 0

Compensation Details
1 of 2

Effective Date 11/24/2021  
 Effective Sequence 1

Action Pay Rate Change  
 Reason Merit

Go To Row

Compensation Rate 1,670.27

\*Frequency B Biweekly

Pay Rates

Biweekly	1,670.269500	USD	Hourly	20,878,369	USD
Annual	43,427,007000	USD	Monthly	3,618,917,250	USD

Pay Components

Amounts
Controls
Changes
Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY	0	1,610.269500	USD	B				+	-
2 PRMPYK	0	60.000000	USD	B				+	-

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

## Lesson 6: Submitting HR Salary Changes

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 Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

**Claudette Mclean** Empl ID 00218029  
Employee Empl Record 0

1 of 2

Effective Date 11/24/2021 Go To Row

Effective Sequence 1 Action Pay Rate Change

HR Status Active Reason Merit

Payroll Status Active Job Indicator Primary Job

---

Compensation Rate 1,670.27 \*Frequency B Biweekly

► **Comparative Information**

▼ **Pay Rates**

Biweekly	1,670.269500	USD	Hourly	20.878369	USD
Annual	43,427.007000	USD	Monthly	3,618.917250	USD

Default Pay Components Contract Change Prorate Option

**Pay Components**

1-2 of 2

Amounts
Controls
Changes
Conversion

*Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent		
MDBKLY	0	76.679500	USD	Biweekly		5.000	+	-
PRMPYK	0	0.000000	USD	Biweekly		0.000	+	-

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

Save Return to Search Notify Refresh

Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

## Lesson 6: Submitting HR Salary Changes

### 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.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Claudette Mclean Empl ID 00218029  
 Employee Empl Record 0

2 of 2

Effective Date 12/28/2020 Go To Row

Effective Sequence 0 Action Data Change  
 HR Status Active Reason  
 Payroll Status Active Job Indicator Primary Job

Compensation Rate 1,593.59 USD \*Frequency B Biweekly

▶ Comparative Information

▼ Pay Rates

Biweekly	1,593.590000	USD	Hourly	19.919875	USD
Annual	41,433.340000	USD	Monthly	3,452.778333	USD

Default Pay Components Contract Change Prorate Option

Pay Components

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	0	1,533.590000	USD	B			
2	0	60.000000	USD	B			

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

Save
Return to Search
Notify
Refresh

Update/Display
Include History
Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

## Lesson 6: Submitting HR Salary Changes

### 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 Data**

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

The screenshot shows the 'Job Data' search interface in the HR Administration system. On the left, a navigation menu lists various HR functions, with 'Job Data' highlighted in red. The main area is titled 'Job Data' and contains a search form. At the top of the form, there are two buttons: 'Find an Existing Value' (highlighted in red) and 'Keyword Search'. Below these is a section for 'Search Criteria' with several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a text input field highlighted in red), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name'. At the bottom of the search criteria section, there are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the very bottom of the form, there are three buttons: 'Search' (highlighted in red), 'Clear', and 'Basic Search' with a 'Save Search Criteria' link.

## Lesson 6: Submitting HR Salary Changes

### 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
Payroll
Salary Plan
Compensation

Ofir Doty  
Employee
Empl ID 00014872  
Empl Record 0

Salary Plan Details ?
1 of 1

Effective Date 01/31/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change  
Reason Merit

Current

---

Salary Admin Plan K

Grade 035

Step 10

GSAF - OPEIU Local 100

Grade Entry Date 01/31/1994

Step Entry Date 01/31/2022

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Update/Display
Include History

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

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## Lesson 6: Submitting HR Salary Changes

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.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Offr Doty  
Employee

Empl ID 00014872  
Empl Record 0

Compensation Details

Effective Date 01/31/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change

Reason Merit

Compensation Rate 2,215.80 USD

Frequency B Biweekly

▶ Comparative Information

▶ Pay Rates

Contract Change Prorate Option

Pay Components

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	MDBKLY	0	2,145.800000 USD	B			
2	PRMPAY	0	70.000000 USD	B			

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

## 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**.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Ofir Doty  
Employee

Empl ID 00014872  
Empl Record 0

**Compensation Details** 1 of 1

Effective Date	01/31/2022		Action	Pay Rate Change
Effective Sequence	0		Reason	Merit
HR Status	Active			
Payroll Status	Active			

Go To Row

---

Compensation Rate Frequency B Biweekly

2,215.80 USD

Current

► **Comparative Information**

► **Pay Rates**

Default Pay Components Contract Change Prorate Option

**Pay Components** 1-2 of 2

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent
1 MDBKLY	0	88.060000 USD	USD	Biweekly		4.279
2 PRMPAY	0	0.000000 USD	USD	Biweekly		0.000

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

## 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**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface with 'HR Administration' selected. On the left, a navigation menu has 'Job Data' highlighted in green. The main area is titled 'Job Data' and contains a search form. At the top of the form, the 'Find an Existing Value' button is highlighted in green. Below it, the 'Search Criteria' section includes several fields: 'Empl ID' (with a dropdown set to 'begins with' and an empty input field highlighted in red), 'Empl Record' (set to '='), 'Name' (set to 'begins with'), 'Last Name' (set to 'begins with'), 'Second Last Name' (set to 'begins with'), 'Alternate Character Name' (set to 'begins with'), and 'Middle Name' (set to 'begins with'). At the bottom of the form, the 'Search' button is highlighted in green, along with 'Clear', 'Basic Search', and 'Save Search Criteria' options. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'.

## Lesson 6: Submitting HR Salary Changes

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

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 for the Leadworker (LEAD) pay component was approved and processed with the effective date of **1/31/2022**.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

George Looper Empl ID 00197376  
 Employee Empl Record 0

1 of 1

Effective Date 01/31/2022
Go To Row

Effective Sequence 0
Action Pay Rate Change

HR Status Active
Reason Components of Pay

Payroll Status Active
Current

Compensation Rate 4,600.61 USD Frequency B Biweekly

Change Amount 193.154800 USD Biweekly  
 Change Percent 4.382 Compa-Ratio 1.46

Pay Rates

Default Pay Components

Contract Change Prorate Option

1-6 of 6

Amounts	Controls	Changes	Conversion				
Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 EDINCP	0	155.780000	USD	B			
2 FIRBA	0	50.770000	USD	B			
3 FIRPRM	0	856.420800	USD	B		24.000	MDCMAX
5 LEAD	0	155.770000	USD	B			
6 MDBKLY	0	3,256.870000	USD	B			

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted Dates

## Lesson 6: Submitting HR Salary Changes

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

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**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface with 'HR Administration' selected. On the left, a navigation menu has 'Job Data' highlighted in green. The main area is titled 'Job Data' and contains a search form. At the top of the form, the 'Find an Existing Value' button is highlighted in green. Below it, the 'Search Criteria' section includes several fields: 'Empl ID' (with a dropdown set to 'begins with' and the input field highlighted in red), 'Empl Record' (set to '='), 'Name' (set to 'begins with'), 'Last Name' (set to 'begins with'), 'Second Last Name' (set to 'begins with'), 'Alternate Character Name' (set to 'begins with'), and 'Middle Name' (set to 'begins with'). At the bottom of the form, the 'Search' button is highlighted in green, along with 'Clear', 'Basic Search', and 'Save Search Criteria' options. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'.

## 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 Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Kaylani O'leary      Empl ID 00219546  
Employee      Empl Record 0

1 of 1

Effective Date 01/10/2022

Effective Sequence 0      Action Pay Rate Change

HR Status Active      Reason Components of Pay

Payroll Status Active

Current

Compensation Rate 2,876.04 USD      Frequency B Biweekly

**Comparative Information**

Change Amount 131.940000 USD      Biweekly

Change Percent 4.808      Compa-Ratio 1.12

▶ Pay Rates

Default Pay Components      Contract Change Prorate Option

**Pay Components**

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	2,674.100000	USD	B			
2 PRCHCT	0	131.940000	USD	B			
3 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation
Creditable Adjusted 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: Payroll

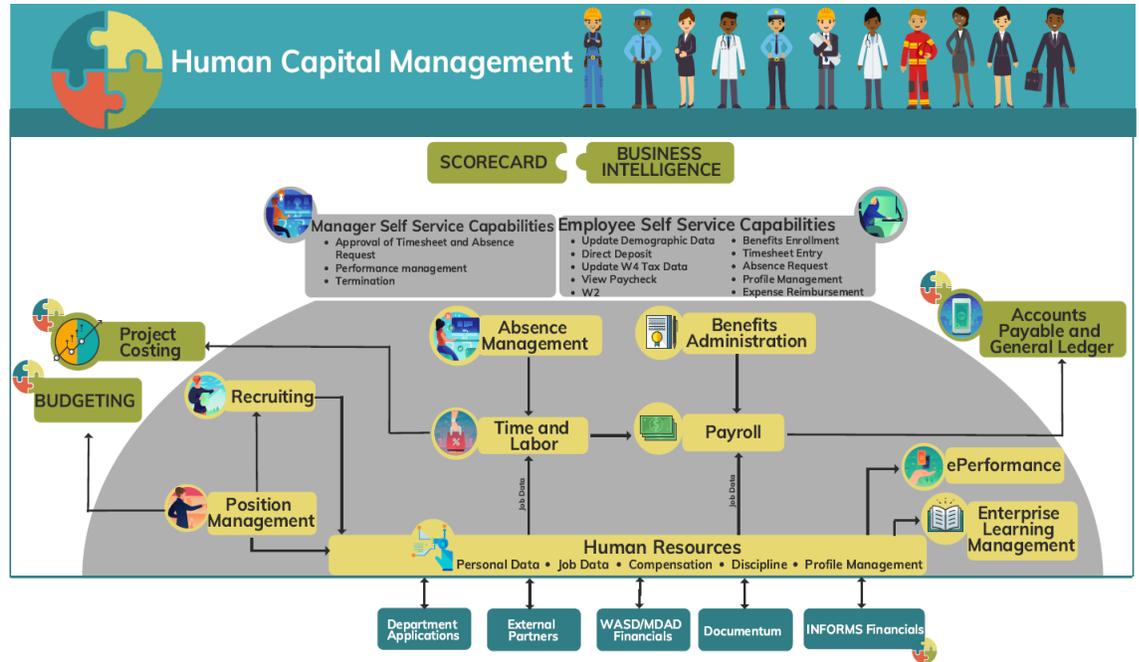
### Lesson 7: Overview

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

- Reviewing Employee's Paycheck for a specific pay period

# Lesson 7: Payroll

## Lesson 7: Introduction



## Lesson 7: Payroll

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Pay Calendar</b>	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.
<b>Pay Group</b>	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.
<b>Pay Run IDs</b>	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.
<b>Earnings Codes</b>	An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.
<b>Deduction Codes</b>	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.

## Lesson 7: Payroll

### Lecture 1: Payroll

This lesson will review Define Payroll.

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

## Lesson 7: Payroll

### Lecture 1: Payroll

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
<b>MDC</b>	Miami-Dade General Employees	All County employees
<b>NON</b>	Miami-Dade Non-Employees	Foster Grandparent, Service Corps Worker, and Senior Companion
<b>CEL</b>	Elections employees	All Constitutional Office Elections employees
<b>CSH</b>	Sheriff employees	All Constitutional Office Sheriff employees
<b>CCL</b>	Clerk of Courts and Finance employees	All Constitutional Office Clerk of Courts and Finance employees
<b>CPA</b>	Property Appraiser employees	All Constitutional Office Property Appraiser employees
<b>CTC</b>	Tax Collector employees	All Constitutional Office Tax Collector employees
<b>RET</b>	Retirees	All Retirees

## Lesson 7: Payroll

### 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 Paycheck

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Company	begins with	MDC	Q
Pay Group	begins with	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](#)

## Lesson 7: Payroll

### Lecture 1: Payroll

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

Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
<a href="#">MDC</a>	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		
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

## Lesson 7: Payroll

### Lecture 1: Payroll

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.



## Lesson 7: Payroll

### 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

Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

Empl ID 00216718    Name Kennedy, Matthew L.  
 Company MDC    Pay Group MDC    Pay Period End 05/31/2020    Page 126    Line 7    Separate Check

**Paycheck Information**

Paycheck Status Confirmed    Paycheck Option Advice  
 Issue Date 06/05/2020    Paycheck Number 3521  
 Off Cycle     Reprint     Adjustment     Corrected     Cashed

**Paycheck Totals**

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

**Earnings** 2 of 2

Begin Date 05/25/2020    End Date 05/31/2020    Addl Line Nbr 3    Reason Not Specified  
 Empl Record 0    Benefit Record 0    Additional Data

**Salaried**

Hours 0.00  
Rate 44.042769  
Earnings 0.00

**Hourly**

Hours 0.00  
Rate 0.000000  
Earnings 0.00  
Rate Code

**Overtime**

Hours 0.00  
Rate 0.000000  
Earnings 0.00  
Rate Code

State FL    Locality  
Rate Used Hourly Rate    Shift Not Applicable    Shift Rate

**Other Earnings**

Code	Description	Rate Used	Hours	Rate	Amount	Source
REG	Regular Hours Pay	Hourly Rate	48.00	44.042769	2,114.05	

**Special Accumulators**

Code	Description	Hours	Earnings	Empl Record
GRS	Reserved for Gross Wages	96.00	4,228.10	0

Return to Search
Notify

Paycheck Earnings | [Paycheck Taxes](#) | [Paycheck Deductions](#)

## Lesson 7: Payroll

### 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.

Paycheck Earnings
Review Paycheck

Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

Empl ID 00216718    Name Kennedy, Matthew L.

Company MDC    Pay Group FRE    Pay Period End 05/31/2020    Page 126    Line 7    Separate Check

**Paycheck Information**

Paycheck Status Confirmed    Paycheck Option Advice

Issue Date 06/05/2020    Paycheck Number 3521

Off Cycle     Reprint     Adjustment     Corrected     Cashed

**Paycheck Totals**

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

**Taxes**

☰ 🔍 1-5 of 5 View All

Tax Details 1
Tax Details 2
Tax Tips

Tax Entity	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal				MED/EE	4,101.26	-594.74
US Federal				Med/ER	4,101.26	-594.74
US Federal				OASDI/EE	4,101.26	-2,542.97
US Federal				OASDI/ER	4,101.26	-2,542.97
US Federal				Withholding	4,101.26	721.51

Return to Search
Notify

[Paycheck Earnings](#) | [Paycheck Taxes](#) | [Paycheck Deductions](#)

## Lesson 7: Payroll

### 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.

The screenshot shows the 'Paycheck Deductions' tab selected. Below the header, there are fields for Employee ID (00216718), Name (Kennedy, Matthew I.), Company (MDC), Pay Group (FRE), and Pay Period End (05/31/2020). A 'Paycheck Information' section includes 'Paycheck Status: Confirmed' and 'Paycheck Option: Advice'. A 'Paycheck Totals' box shows Earnings: 4,228.10, Taxes: -2,416.20, Deductions: 186.76, and Net Pay: 6,457.54.

The 'Deductions' section is expanded to 'Deduction Details 1', showing a table with the following data:

Deduction Code	Description	Class	Amount	Calculated Base
DFFLF	DCFF Basic Life Ins Trust	Nontaxable Benefit	0.90	109,930.75
SDIS	Short-Term Disability Insuranc	After-Tax	3.80	259.99
FRS	FRS Contribution	Before-Tax	126.64	4,228.10
FRS	FRS Contribution	Nontaxable Benefit	1,035.88	4,228.10
FR1403	Firefighters Union Local 1403	After-Tax	38.94	
FRCHAR	Firefighters Charities	After-Tax	4.00	
FRPAC	Firepac	After-Tax	5.00	
MINESX	Minnesota Opt Life (5X)	After-Tax	7.75	

Below the table is a 'Garnishments' section with a search bar and a 'Net Pay Distribution' table:

Check/Advice Number	Account Type	Bank ID	Account Number	Amount
3521	Checking	87654321	XXXX5678	6,457.54

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

The screenshot shows the 'Garnishments' section with a search bar and a table of details:

Priority	ID	Type
1	GRN191	Tax Levy
Vendor	GARNISH-001	AP Status
Law Source	\$U	Rule ID
Disposable Earnings	2,364.32	LEVY/S
Less Exemption	482.69	Tax Levy/Single
Less Other Garnishments		Proration Rule ID
Maximum Deduction	1,881.63	Limited Type
Limited Amount	1,881.63	Deduct Not Limited
Garnishment Amount	1,881.63	
Company Fee		
Payee Fee		
Total Deducted	1,881.63	<input type="checkbox"/> Adjusted Due To Included Fee

## Lesson 7: Payroll

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

< Paycheck Earnings
Review Paycheck

Paycheck Earnings

Paycheck Taxes

Paycheck Deductions

Empl ID 00216718    Name Kennedy,Matthew L  
 Company MDC    Pay Group FRE    Pay Period End 05/31/2020    Page 126    Line 7    Separate Check

**Paycheck Information**

Paycheck Status	Confirmed	Paycheck Option	Advice
Issue Date	06/05/2020	Paycheck Number	3521
<input type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected
<input type="checkbox"/> Cashed			

**Paycheck Totals**

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

**Deductions**

Q
1-8 of 9
View All

Deduction Details 1

Deduction Details 2

Deduction Details 3

Deduction Code	Plan	Benefit Record	Plan Type	Not Taken	Reason
DCFFLF	FLIFE	0	Life		
STDIS	STDHGH	0	Short-Term Disability		
FRS	HB	0	Florida Retirement System		
FRS	HB	0	Florida Retirement System		
FF1403		999	General Deduction		
FFCHAR		999	General Deduction		
FRPAC		999	General Deduction		
LIFESX		999	General Deduction		

▶ Garnishments

**Net Pay Distribution**

Q
1-1 of 1
View All

Check/Advice Number	Account Type	Bank ID	Account Number	Amount
3521	Checking	87654321	XXXX5678	6,457.54

Return to Search
Notify

Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

**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.

## Lesson 7: Payroll

### Lecture 2: Print Paycheck

This lecture will review how to view and print an employee’s 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**.

#### Review Self Service Paycheck

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Company begins with

Pay Group begins with

Empl ID begins with

Name begins with

Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

**Search Results**

View All 1-1 of 1

Company	Pay Group	Empl ID	Name
MDC	MDC	00400873	Crespi,Christina

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

#### View Self Service Paycheck

Christina Crespi

**Select Paycheck**

View All 1-2 of 2

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	<input checked="" type="checkbox"/>
11/19/2021	View Paycheck	Miami Dade County	11/01/2021	11/14/2021	\$1319.22	62254	<input checked="" type="checkbox"/>

Return to Search

## Lesson 7: Payroll

### Lecture 2: Print Paycheck

- 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 Group: MDC-General Employees Pay Begin Date: 11/15/2021 Pay End Date: 11/28/2021	Business Unit: PH Advice #: 000000000060372 Advice Date: 12/03/2021															
Christina Crespi 112 NW Second Street Miami, FL 33128		Employee ID: 00400873 Department: PH08100000-NEWBERG WAREHOUSE Location: OPEN LAND/VACANT LOT/CANAL Job Title: Electrician Pay Rate: \$1,900.70 Biweekly	<b>TAX DATA:</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th></th> <th>Federal</th> <th>FL State</th> </tr> <tr> <td>Tax Status:</td> <td>Single</td> <td>N/A</td> </tr> <tr> <td>Allowances:</td> <td>N/A</td> <td>0</td> </tr> <tr> <td>Addl. Percent:</td> <td>N/A</td> <td></td> </tr> <tr> <td>Addl. Amount:</td> <td></td> <td></td> </tr> </table>				Federal	FL State	Tax Status:	Single	N/A	Allowances:	N/A	0	Addl. Percent:	N/A		Addl. Amount:		
	Federal	FL State																		
Tax Status:	Single	N/A																		
Allowances:	N/A	0																		
Addl. Percent:	N/A																			
Addl. Amount:																				
<b>HOURS AND EARNINGS</b>																				
<b>Description</b>	<b>Rate</b>	<b>Current Hours</b>	<b>Earnings</b>	<b>Hours</b>	<b>YTD Earnings</b>															
AdminHrs	23.758750	40.00	950.35	84.00	1,995.74															
AdminHrs	23.758750	24.00	570.21	0.00	0.00															
Holiday	23.758750	16.00	380.14	24.00	570.21															
Car Allowa			0.00		100.00															
Night Diff			0.00	16.00	17.83															
Overtime H			0.00	7.00	249.47															
Regular Ho			0.00	52.00	1,235.46															
<b>TOTAL:</b>		<b>80.00</b>	<b>1,900.70</b>	<b>183.00</b>	<b>4,168.71</b>															
<b>TAXES</b>																				
<b>Description</b>	<b>Current</b>	<b>YTD</b>																		
Fed Withholding	155.66	370.60																		
Fed MED/EE	27.56	60.45																		
Fed OASDI/EE	117.84	258.46																		
<b>TOTAL:</b>	<b>301.06</b>	<b>689.51</b>																		
<b>BEFORE-TAX DEDUCTIONS</b>																				
<b>Description</b>	<b>Current</b>	<b>YTD</b>																		
FRS Contribution	57.02	122.06																		
<b>TOTAL:</b>	<b>57.02</b>	<b>122.06</b>																		
<b>AFTER-TAX DEDUCTIONS</b>																				
<b>Description</b>	<b>Current</b>	<b>YTD</b>																		
GARNChild (Amount)	50.00	100.00																		
GARNChild (Co. Fee)	2.00	4.00																		
GARN-Tax Levy	250.40	672.70																		
GARN-Writ (Amount)	81.25	81.25																		
GARN-Writ (Co. Fee)	2.00	2.00																		
Govt Supervisors Assoc Dues	21.00	42.00																		
<b>TOTAL:</b>	<b>406.65</b>	<b>901.95</b>																		
<b>EMPLOYER PAID BENEFITS</b>																				
<b>Description</b>	<b>Current</b>	<b>YTD</b>																		
Medical Select Insurance Plan	519.23	1,038.46																		
Basic Life Insurance	4.00	8.00																		
FRS Contribution	205.66	440.24																		
<b>TOTAL:</b>	<b>728.89</b>	<b>1,486.70</b>																		
<b>*TAXABLE</b>																				
<b>TOTAL GROSS</b>																				
Current	1,900.70	1,843.68	301.06	463.67	1,135.97															
YTD	4,168.71	4,046.65	689.51	1,024.01	2,455.19															
<b>NET PAY DISTRIBUTION</b>																				
Advice #000000000060372	<b>Account Type</b>	<b>Account Number</b>	<b>Deposit Amount</b>																	
	Checking	XXXXXXXX6789	500.00																	
	Checking	XXXXXXXXXX6075	635.97																	
<b>TOTAL:</b>			<b>1,135.97</b>																	
<b>MESSAGE:</b>																				
		Please consider the environment before printing your paystub	<b>Mission Statement:</b> "Delivering excellent public services that address our community's needs and enhance our quality of life, now and in the future."																	

## Lesson 7: Payroll

### 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: Workflow Approvals

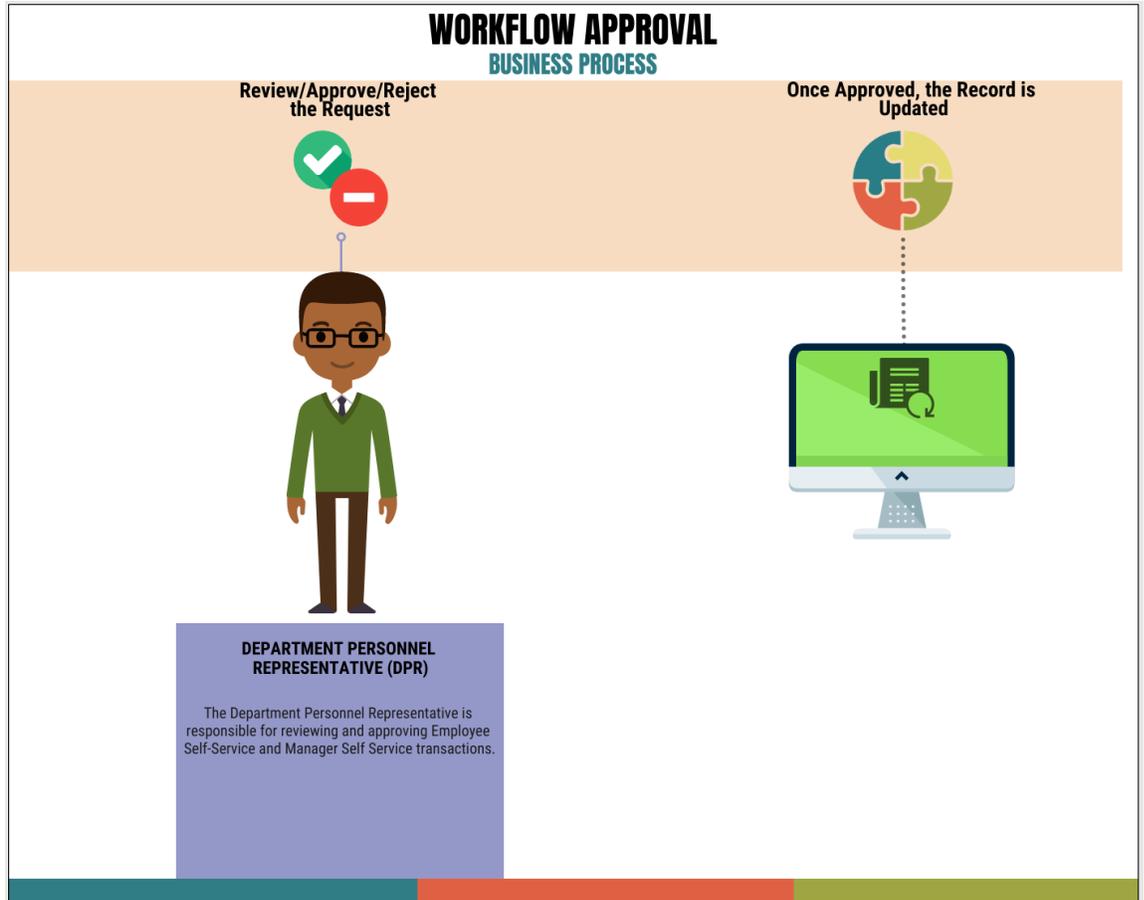
### Lesson 8: Overview

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

- Review and Approve License/Certification Requests

## Lesson 8: Workflow Approvals

### Lesson 8: Introduction



## Lesson 8: Workflow Approvals

### Key Terms



The following key terms are used in this module:

Term	Definition
N/A	N/A

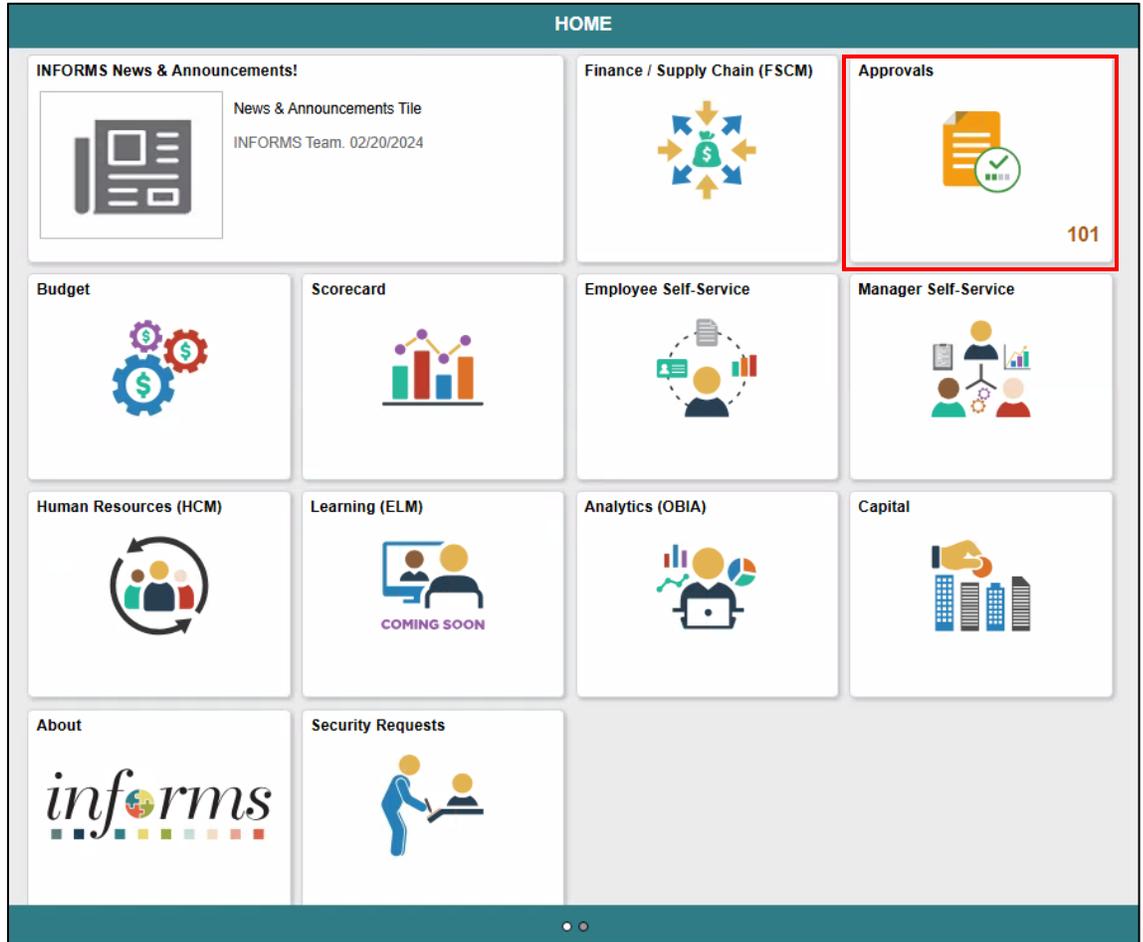
## Lesson 8: Workflow Approvals

### 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.

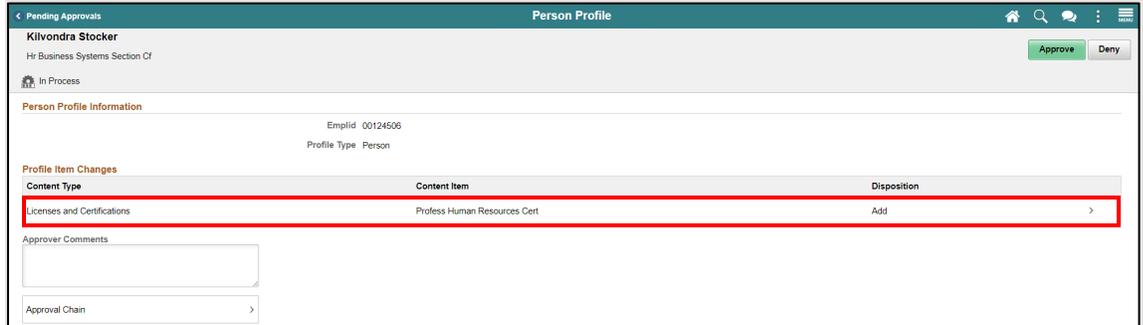
View By		Type		
All	Person Profile	All		3 rows
	Person Profile	Devaghn Liang	Profile Type: Person Licenses and Certifications(1)	Routed 01/20/2022
	Person Profile	Kivandra Stocker	Profile Type: Person Degrees(1)	Routed 02/18/2022
	Person Profile	Kivandra Stocker	Profile Type: Person Licenses and Certifications(1)	Routed 02/18/2022

## Lesson 8: Workflow Approvals

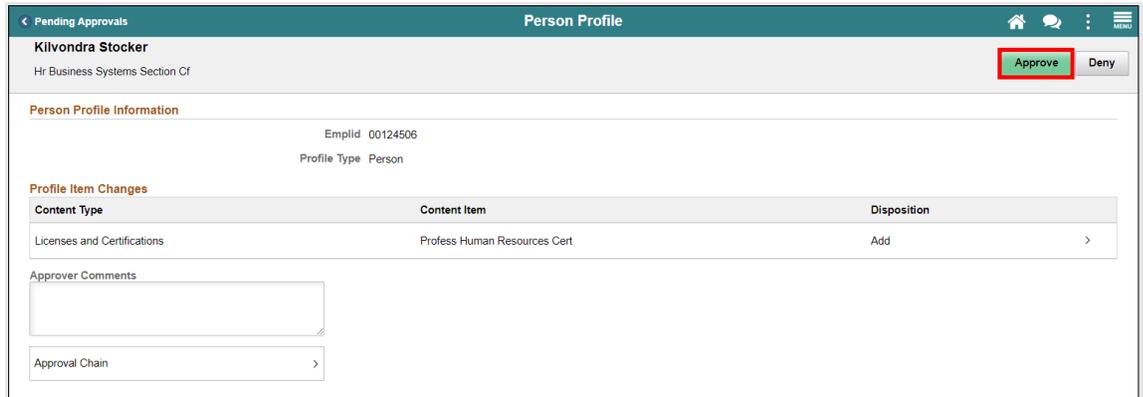
### Lecture 1: Approvals (License/ Certifications)

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

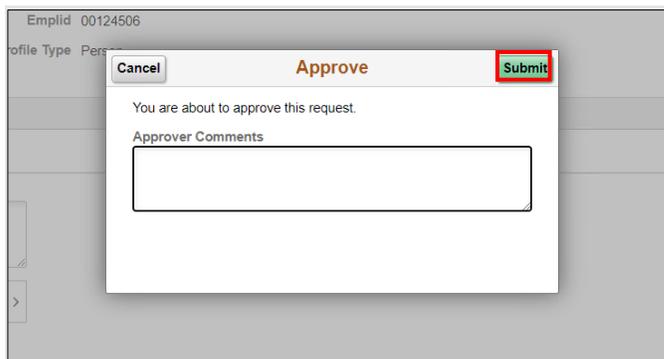
2. Select the **Profile Item Changes Content Item** to view the request before approving.



3. Select **Approve**.



4. Select **Submit**.



## Lesson 8: Workflow Approvals

### 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**

ID	Degree	Major Code	Attachments
BS	Bachelor of Science	Public Administration	
HSD	High School Diploma		

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

## Lesson 8: Workflow Approvals

### 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: Overview

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

- Understand the list of Reports:
  - **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

### Key Terms



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
<b>Safe Driving Award</b>	Used to obtain Departmental Employees with Safe Driving Award with Amount and Pay Period Date
<b>Combo Code Summary</b>	Used to obtain Departmental Combination Codes for Position Budget Funding related to Position Management
<b>Active and LOA Employee Counts by Business Unit</b>	Used to obtain active and leave of absence employee counts
<b>Overtime and Earning Code, Detail Report</b>	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:

- Understand the list of Reports:
  - **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

## Module 3: Guide Summary

### Objectives Achieved



You have completed the Personnel Changes guide. You now should be able to:

- 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 3: Guide Summary

### Additional Training and Job Aids

Other training materials, related to this topic, include:

- 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:

[Miamiidade.gov/informs](http://Miamiidade.gov/informs)

## Glossary

### Key Terms



The following key terms are used in this guide:

Term	Definition
<b>Combination Code</b>	A key that defines a combination of ChartFields needed for Position Budget Funding.
<b>Components of Pay</b>	Additional elements of pay added to the employee's compensation. Components can be added or removed based on operational need.
<b>Deduction Codes</b>	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.
<b>Earnings Codes</b>	An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.
<b>Full-Time Equivalent (FTE)</b>	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.
<b>Job Code</b>	Contains the classification's information such as title, salary plan and grade, bargaining unit, and job description.
<b>Pay Calendar</b>	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.
<b>Pay Group</b>	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.
<b>Pay Run IDs</b>	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.
<b>Position Data</b>	Details related to a position such as Position Information, Job Information, Work Location, and Salary Plan Information
<b>Top of Stack</b>	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
<b>Company</b>	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.
<b>Historical Row</b>	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.