Course ID: DPR 302
Course: Personnel Changes

Updated 01-08-2025

Ground Rules

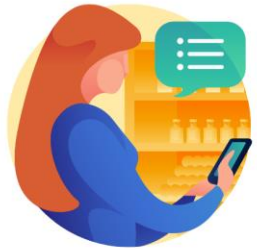
Be on time

Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed



Feel free to ask questions

Course Overview

Course Description	This course provides a comprehensive review of the Personnel Changes processes. This course consists of the following modules: • Module 1: Course Introduction • Module 2: Personnel Changes • Module 3: Course Summary
Training Audiences	• Department Personnel Representative (DPR)
Prerequisites	• ERP 101 – Overview of INFORMS • ERP 102 – INFORMS Navigation and Online Help • HCM 101 – Human Resources Fundamentals

Course Overview, Cont'd

Other Related Courses	• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation) • DPR 303 – Departmental HR - Time Management • DPR 304 – Departmental HR - Updating Team Information • DPR 321 – Departmental HR – Recruitment
Estimated Duration	• 3 Hours

Course Outline

Content
Module 1: Course Introduction
Module 2: Personnel Changes
• Lesson 1: Position Management
○ Lecture 1: Create New Position
○ Lecture 2: Budget Approval
○ Lecture 3: Validate Position
• Lesson 2: Define Department/Position Budget Data
○ Lecture 1: Add Position Budget Funding
○ Lecture 2: Update Position Budget Funding
○ Lecture 3: Inactivate Position Budget Funding
• Lesson 3: Submitting Position Change
○ Lecture 1: Modify Position
○ Lecture 2: Validating Modification Request
○ Lecture 3: Inactive Position
○ Lecture 4: Validating Inactive Position

Course Outline, Cont'd

Content
• Lesson 4: Submit Job Data Changes that Impact Benefits
○ Lecture 1: Submit Job Data Changes that Impact Benefits
• Lesson 5: Submitting HR Transactions
○ Lecture 1: Transfer Employee to a Position (Lateral)
• Lesson 6: Submitting HR Salary Changes
○ Lecture 1: Merit Increase (Salary Grade)
○ Lecture 2: Merit Increase (Salary Step)
○ Lecture 3: Pay Components (Pay Supplement)
○ Lecture 4: Pay Components (License/Certifications)
○ Lecture 5: Review Salary Changes via Job Data (Salary Grade)
• Lesson 7: Payroll
○ Lecture 1: Payroll
○ Lecture 2: Print Paycheck

Course Outline, Cont'd

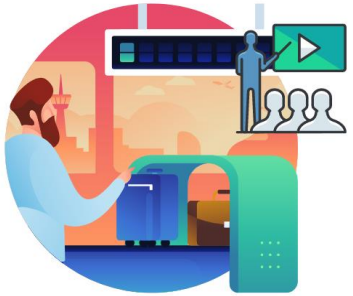
Content
• Lesson 8: Workflow Approvals
○ Lecture 1: Approvals (License/Certifications)
• Lesson 9: Reports and Queries
○ Lecture 1: Reports and Queries
Module 3: Course Summary

Module 1: Course Introduction

Module Topics
Course Administration and Logistics
Learning Objectives
Roles and Responsibilities
Navigation
Purpose and Benefits
The End-to-End Business Process
Introduction to Activities and Exercises

Course Administration and Logistics

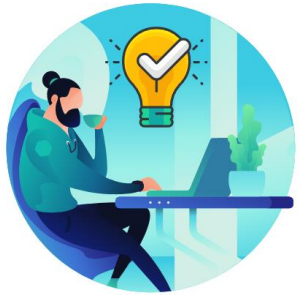
To receive credit for completing this course, Users must record your attendance at the beginning and end of class



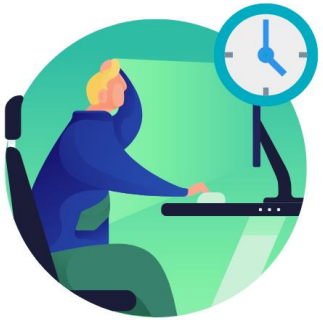
Please turn off your cell phones and refrain from checking email and the Internet while in class

Actively participate in class

Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

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

Roles and Responsibilities

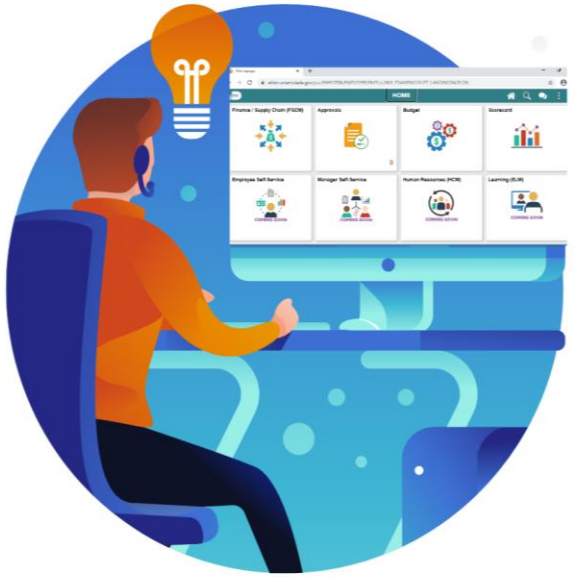
The roles and responsibilities associated with this course:

Role	Responsibilities
Department Personnel Representative	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
Constitutional Office Department Personnel Representative	The Constitutional Office Department Personnel Representative is responsible for reviewing and approving Employee Self-Service (ESS) and Manager Self-Service (MSS) transactions.
HR Central Position Administrator	The HR Central Position Administrator is responsible for creating, reviewing, editing and approving position edits and reporting.
HR Central Administrator Specialist	The HR Central Administrator Specialist is responsible for Job Data changes. The HR Central Administrator Specialist can review and audit Manage Hire transactions.
HR Central Compensation Administrator	The HR Central Compensation Administrator is responsible for Job Code tables, Salary Plan Table, Non-Person Profile, Recruitment Questions-sets and Review/Approve job openings within their approval path.

Introduction to Activities and Exercises

You will take part in two types of hands-on learning throughout this course.

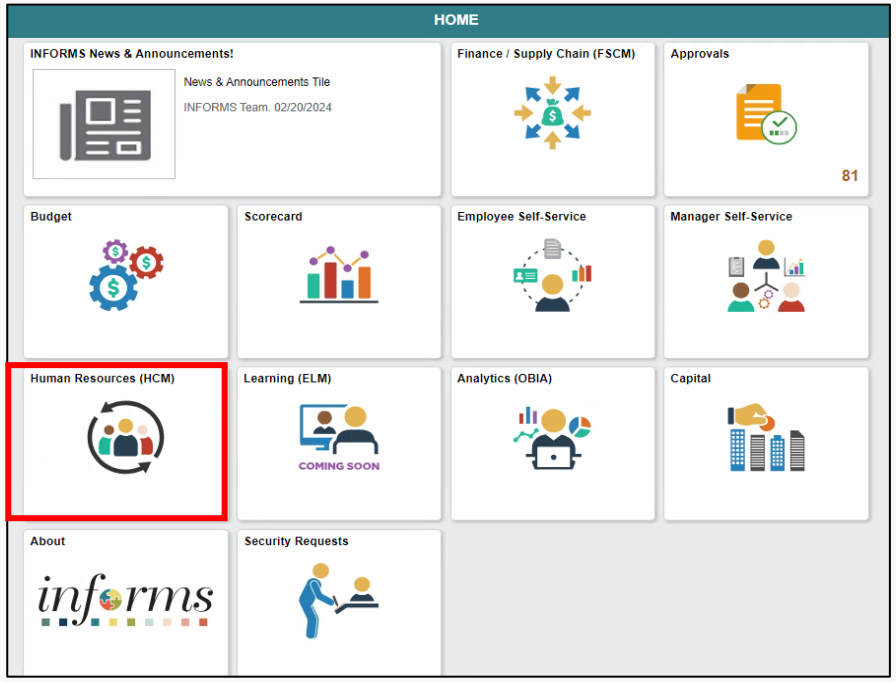
Training Activities

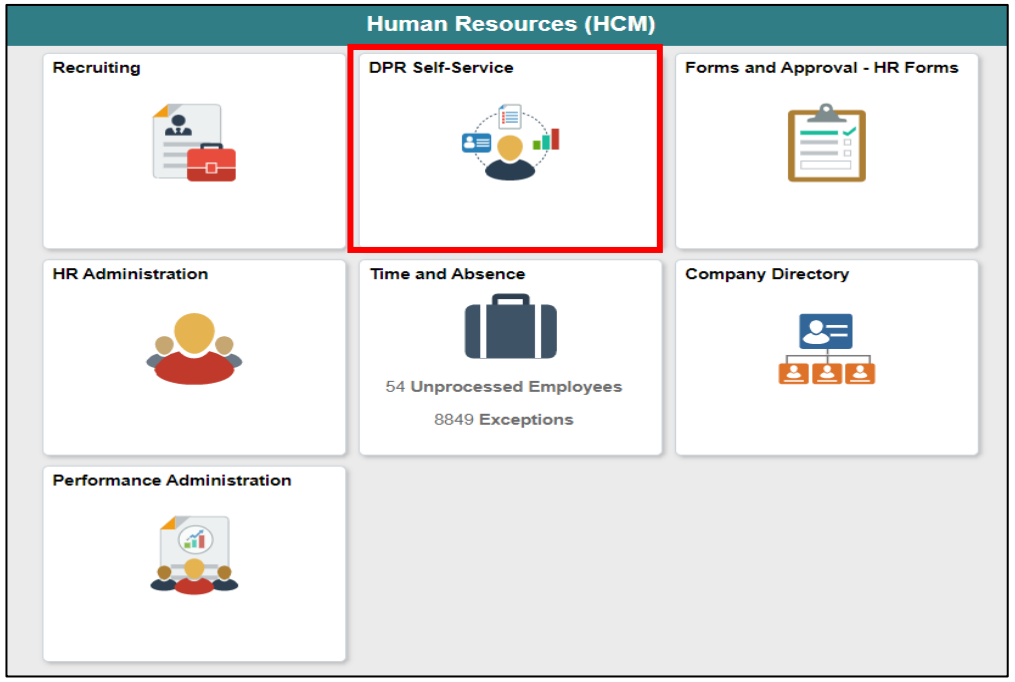


Training Exercises

Navigation

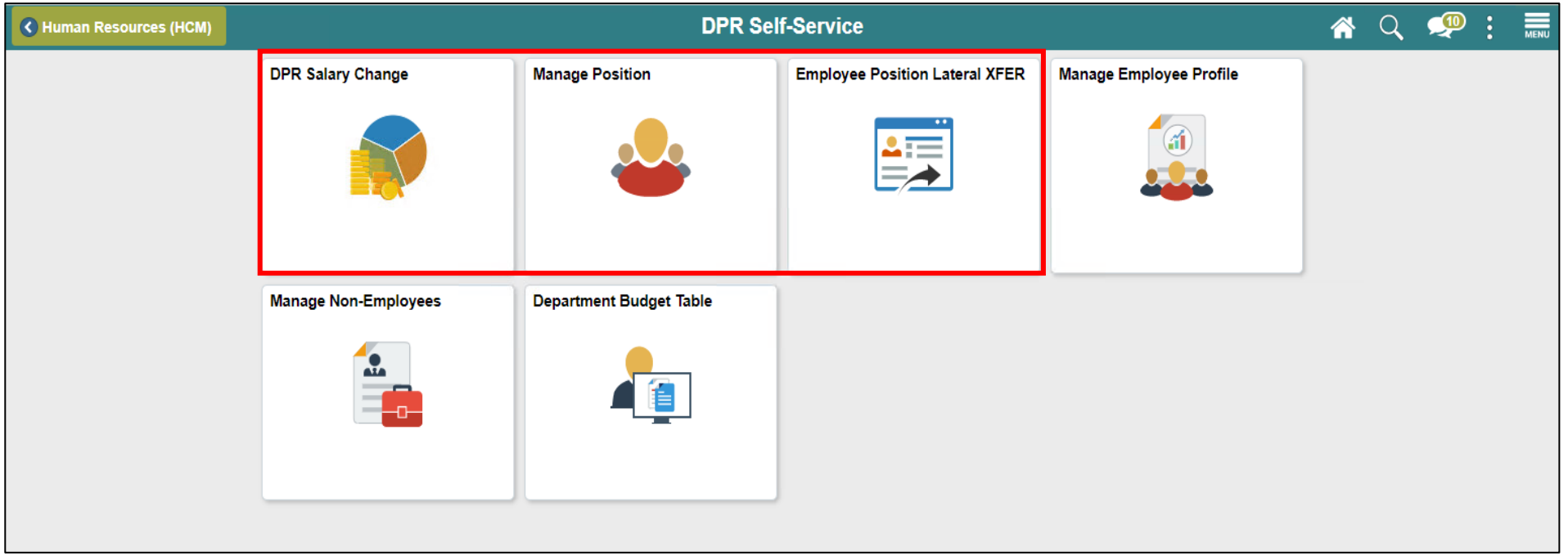
1. Login to INFORMS and select **Human Resources (HCM)** from the home landing page
2. Select **DPR Self-Service**





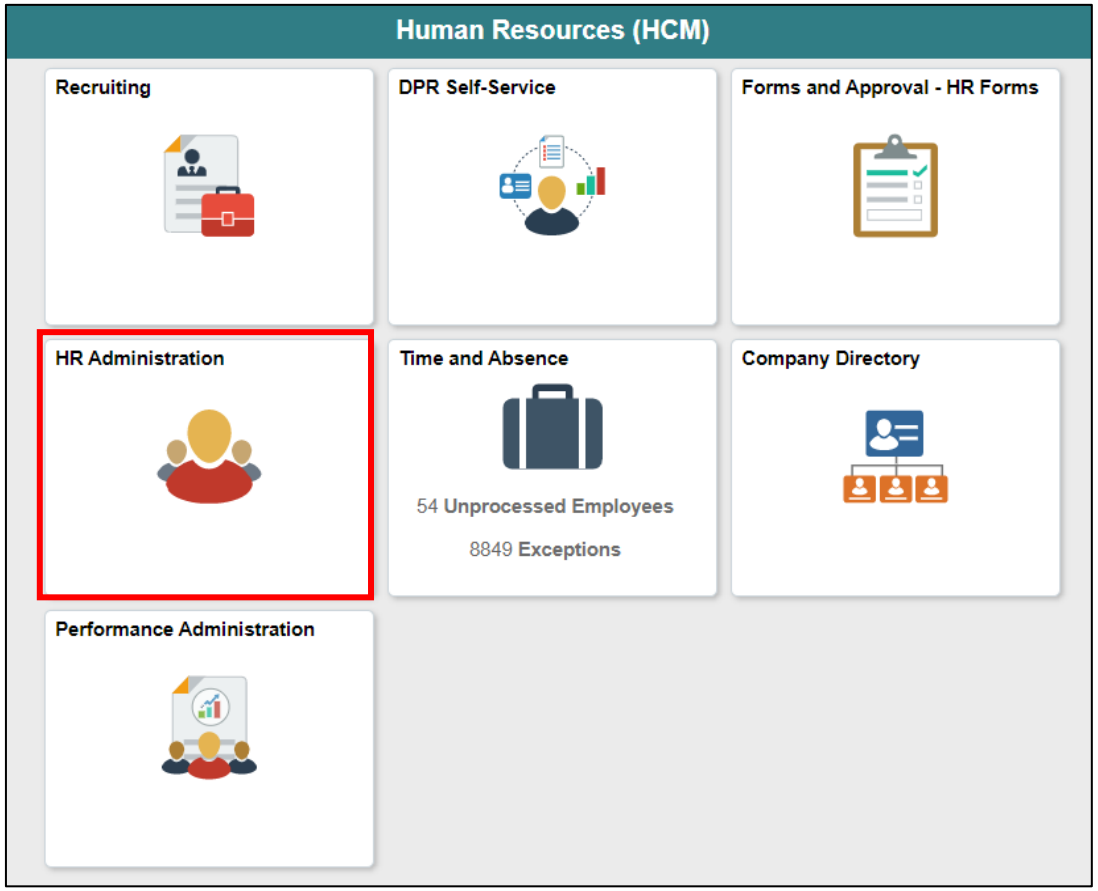
Navigation Cont'd

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



Navigation Cont'd

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

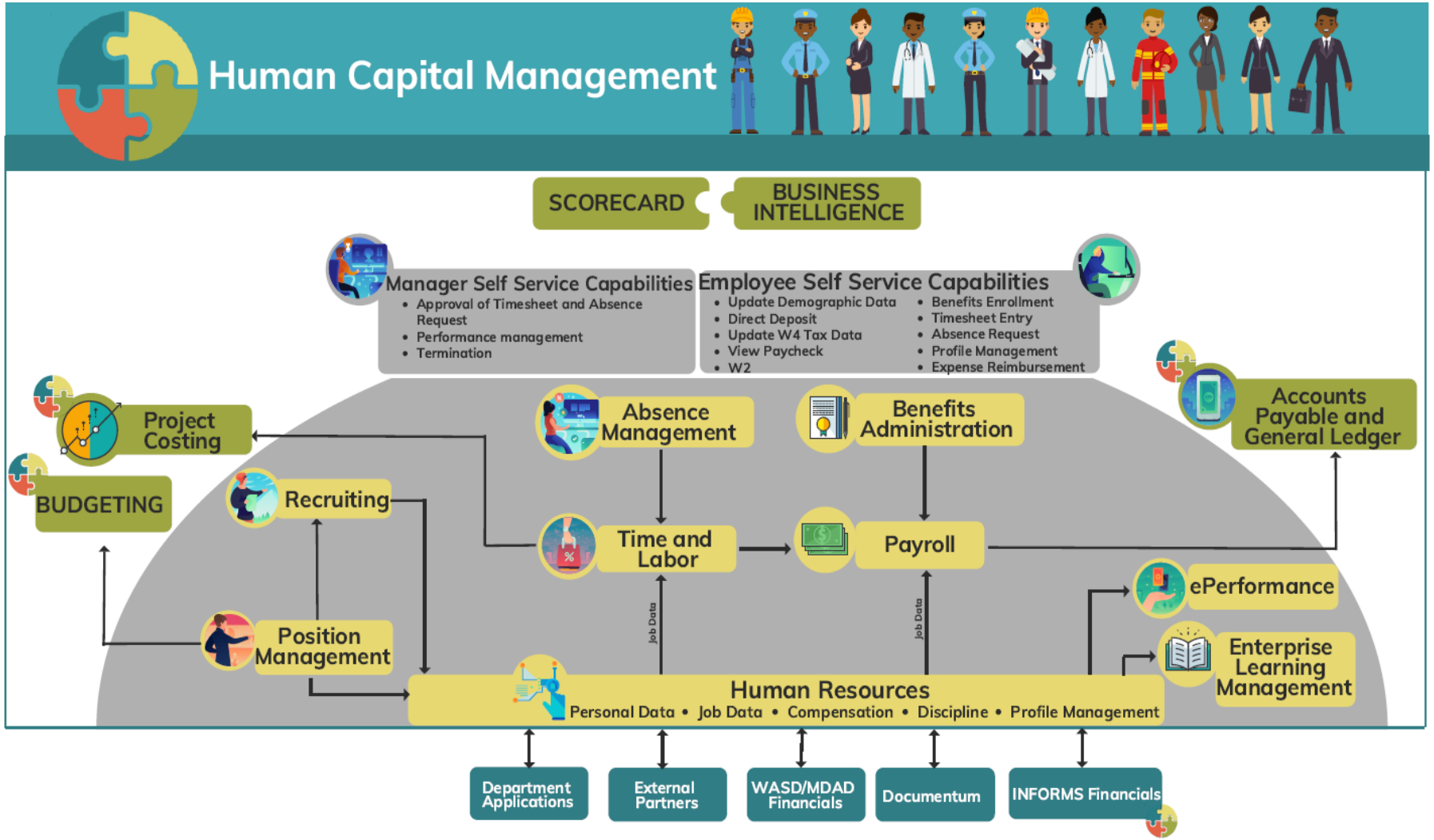


Purpose and Benefits

The purpose and benefits of the 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

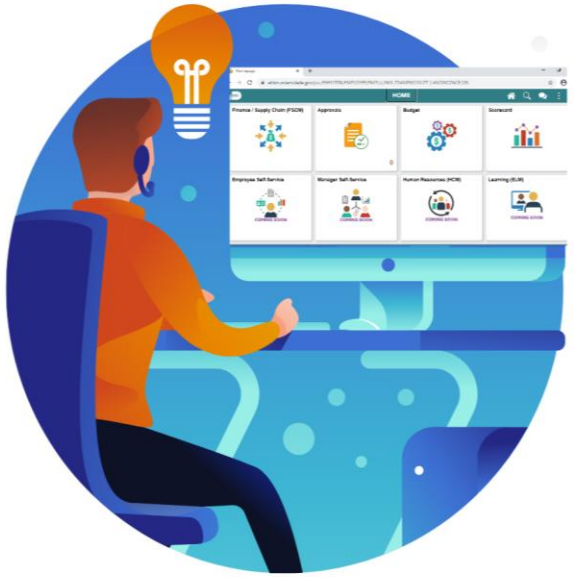
End-to-End Business Process



Introduction to Activities and Exercises

You will take part in two types of hands-on learning throughout this course.

Training Activities



Training Exercises

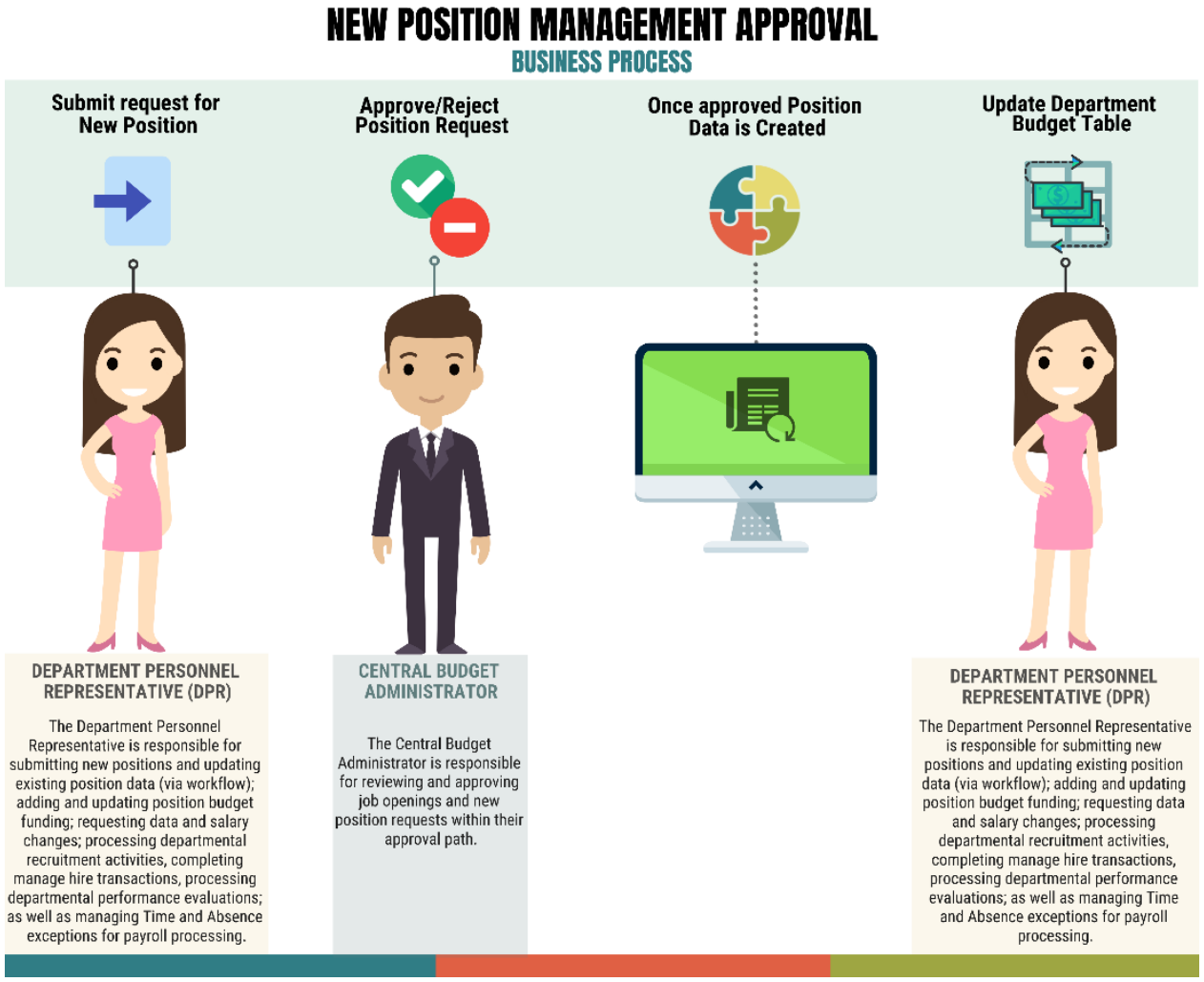
Module 1: Course Introduction Summary

Module Topics
Course Administration and Logistics
Learning Objectives
Roles and Responsibilities
Navigation
Purpose and Benefits
The End-to-End Business Process
Introduction to Activities and Exercises

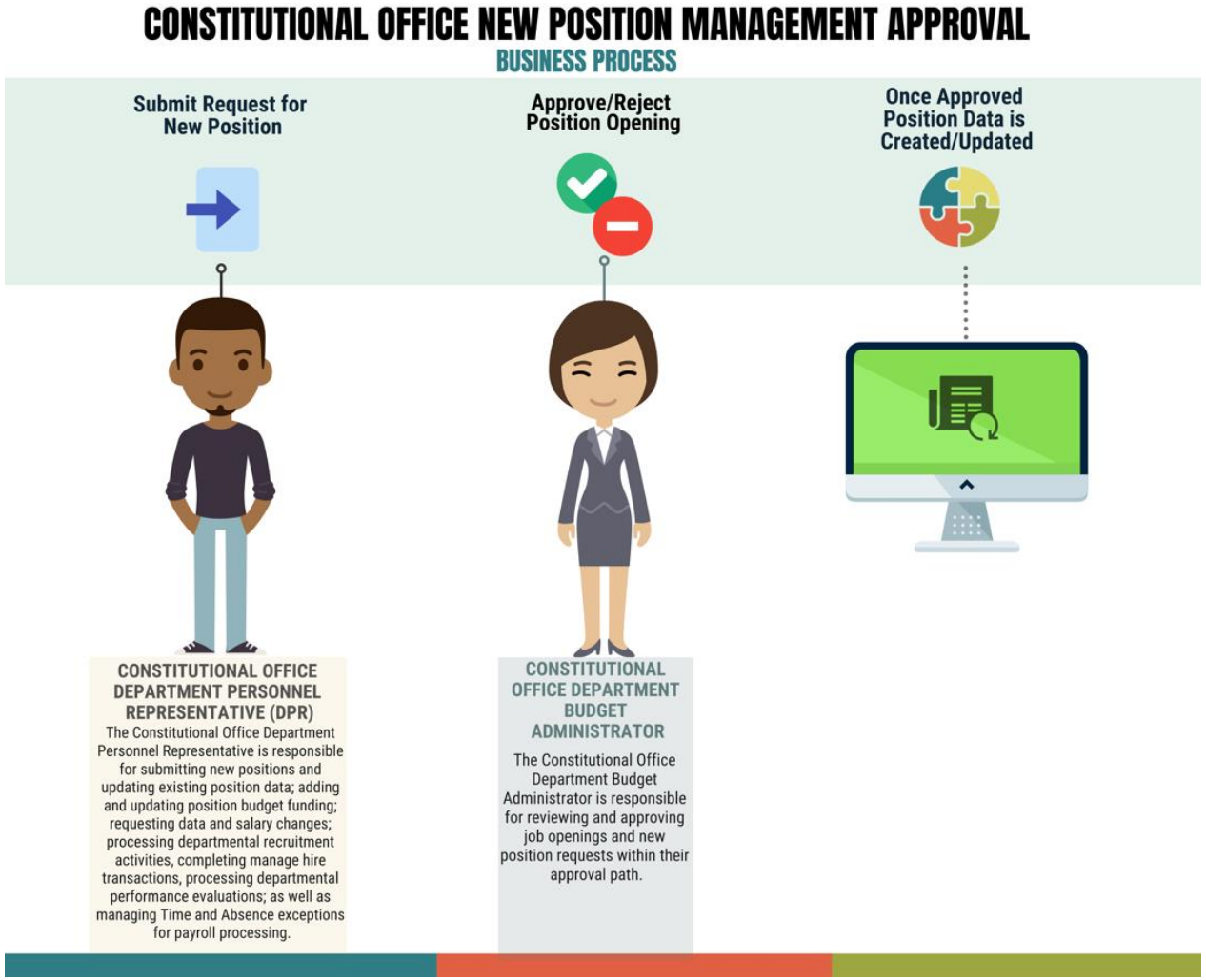
Module 2: Personnel Changes

Module Topics
Module Introduction
• Lesson 1: Position Management
• Lesson 2: Define Department/Position Budget Data
• Lesson 3: Submitting Position Change
• Lesson 4: Submit Job Data Changes that Impact Benefits
• Lesson 5: Submitting HR Transactions
• Lesson 6: Submitting HR Salary Changes
• Lesson 7: Payroll
• Lesson 8: Workflow Approvals
• Lesson 9: Reports and Queries

Lesson 1: Position Management



Lesson 1: Position Management Cont’d



Lesson 1: Position Management Cont’d

At the conclusion of this lesson, participants 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

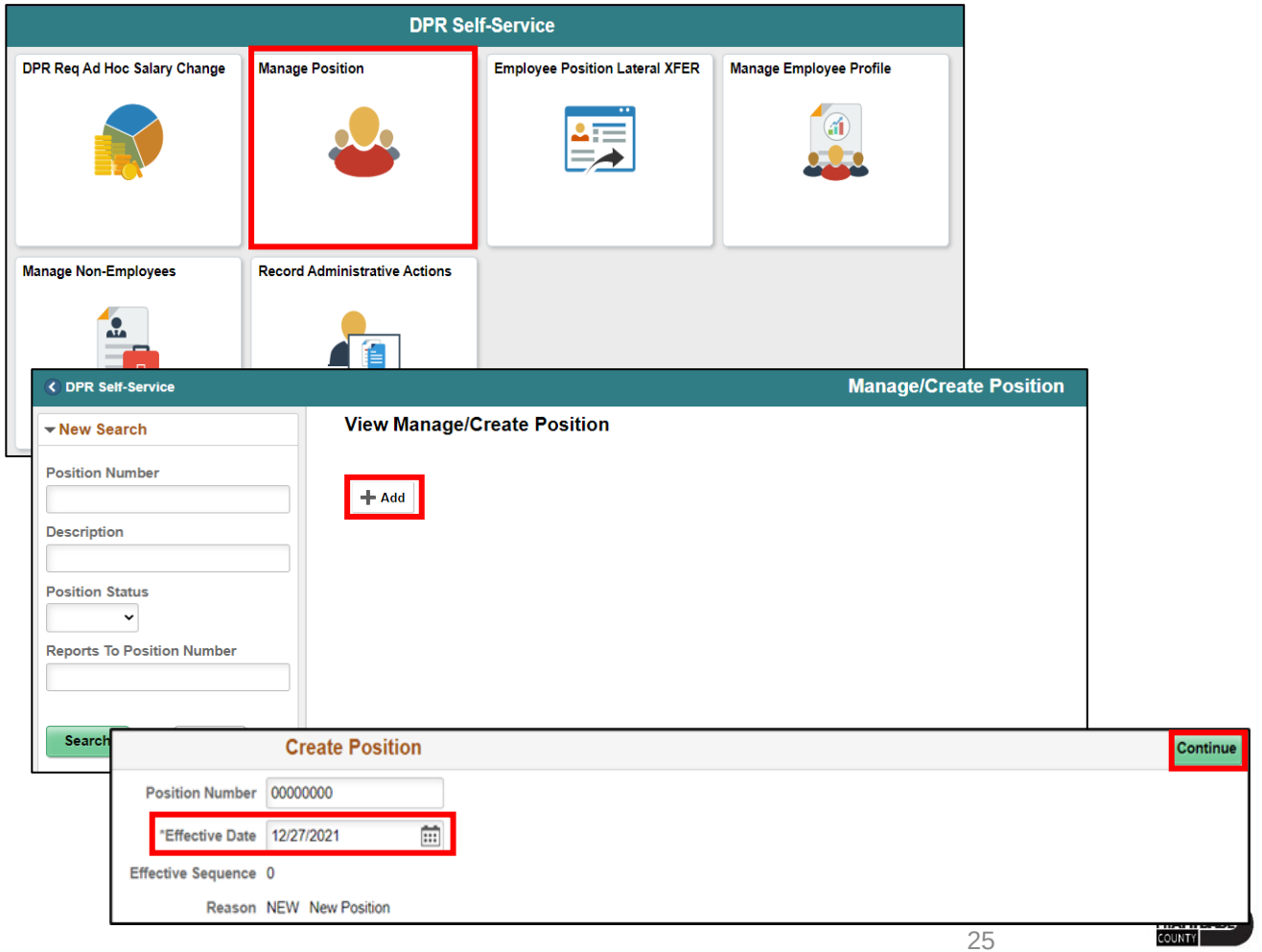
Lesson 1: Key Terms

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

Lecture 1: Create New Position

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

1. Select the **+ Add** button, on the **View Manage/Create Position** page.
2. In the ***Effective Date** field, enter a date that correlates with the beginning of the fiscal year.
3. Select **Continue**.



Lecture 1: Create New Position Cont'd

The **Create New Position** process consists of five (5) Steps:

- Position Data
- Additional Information
- Attachments
- Budget Incumbents
- Review and Submit

Once all the steps are completed, the OMB Budget Administrator reviews and approves the new position request in INFORMS. Once the request is fully approved, the new position is successfully established within INFORMS.

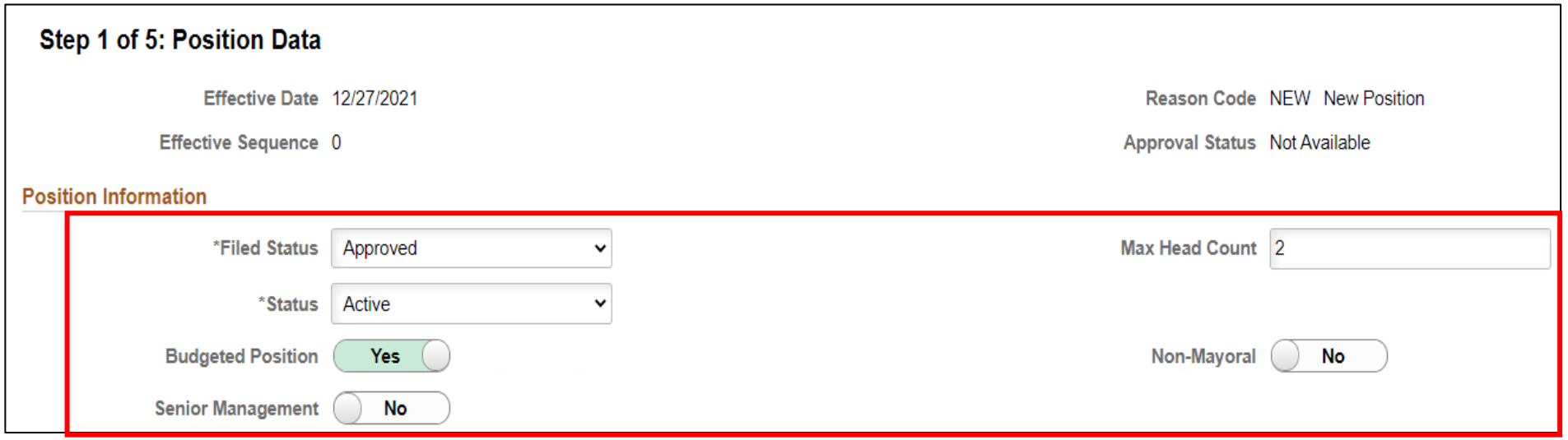
Lecture 1: Create New Position Cont'd

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

4. In the ***Filed Status** field, select **Approved**.
   - **NOTE: Proposed** is selected when requesting a position for the next Fiscal Year.
5. In the **Max Head Count** field, enter the number of seats you are requesting with the same classification in that position.
6. In the ***Status** field select **Active** as users are requesting to activate a new position.
7. In the Budgeted Position ensure Yes is selected for budgeted positions.
   - **NOTE:** If the position is an **Overage** select **No**.

Lecture 1: Create New Position Cont'd

8. 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**.
9. The **Senior Management** field **(Leave as default).**



Lecture 1: Create New Position Cont'd

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

10. The ***Business Unit** field is defaulted by security.
11. In the **Full/Part Time** field, select **Full-Time** or **Part-Time** depending on the position.
12. 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.
      - **Union Code, Short Title, *Regular Shift, Description, *Title and *Regular/Temporary**
      - **NOTI** ns from the Job Code but u

Lecture 1: Create New Position Cont'd

In the **Work Location** section, review or select the following:

13. Ensure ***Reg Region** is set to **USA**
14. In the ***Department** field, select or enter the **Department ChartField** where the position will be located
15. In the **Location** field, enter the **Location ChartField** where the position will be located
16. 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
17. In the **Supervisor Level** field, select the appropriate **Supervisor Level** for the classification
    - See 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

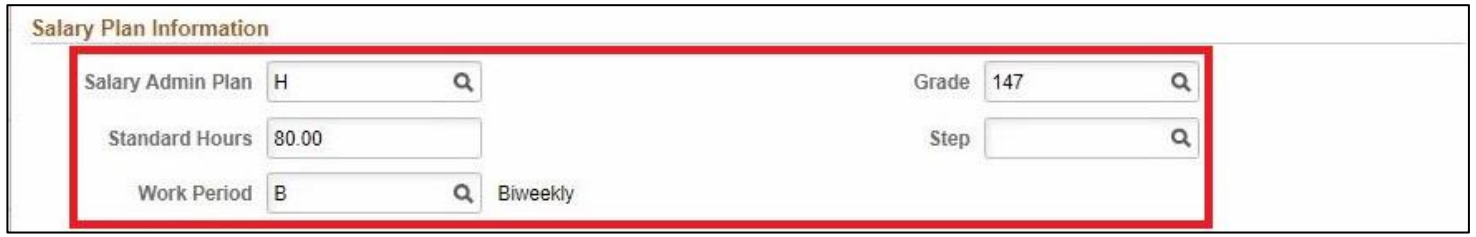
Lecture 1: Create New Position Cont'd

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

19. 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)

Lecture 1: Create New Position Cont'd

20. 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**.



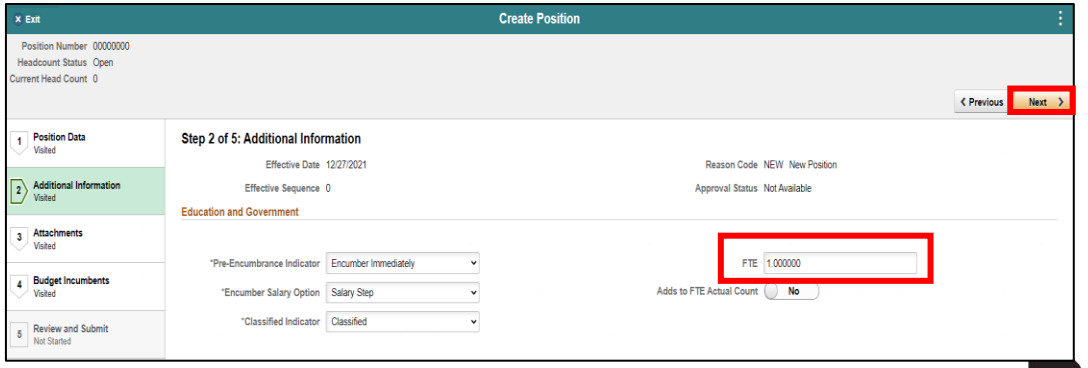
21. In the **USA** section, the FLSA Status field automatically defaults from the Job Code:
    - **FLSA Status** - **Non-Job Basis/Job Basis** (Leave Defaulted)

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

Lecture 1: Create New Position Cont'd

- In the **Additional Information** page, the following fields automatically default:
  - ***Pre-Encumbrance Indicator** (Leave as Defaulted), ***Encumber Salary Option** (Leave as Defaulted) and ***Classified Indicator** (Leave as Defaulted)
- Toggle **Adds to FTE Account** if the 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 calculate 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 will prorate the employee's salary

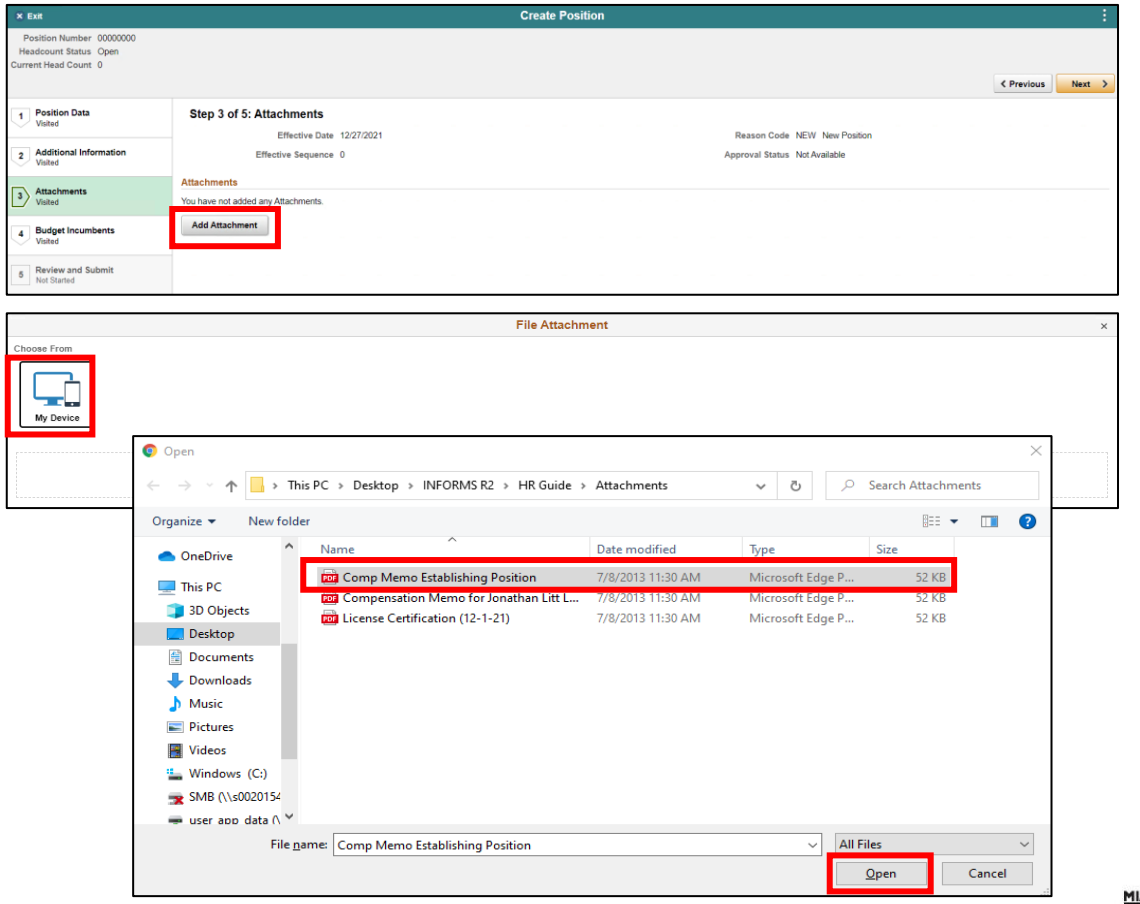
23. In the **FTE field**, enter the **1** for Full-Time
24. Select **Next** to go to **Attachments**



Lecture 1: Create New Position Cont'd

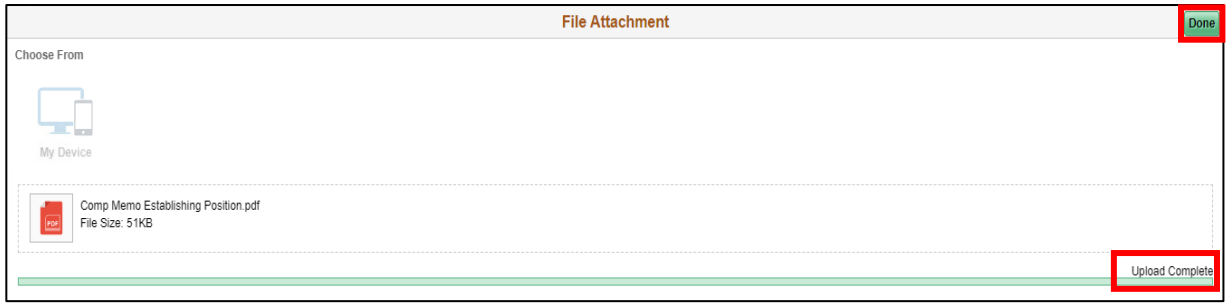
In the **Attachments** page, users add supporting documentation for the new position.

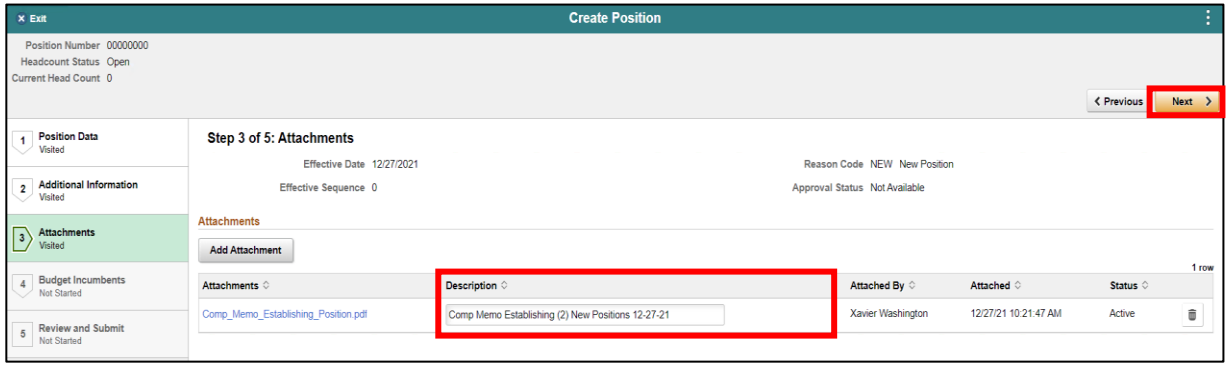
25. Select **Add Attachment**
26. Select **My Device**
27. Search the document to attach
28. Select **Open**.



Lecture 1: Create New Position Cont'd

29. Select **Upload**
30. Select **Done** once the upload is complete
31. In the **Description** field, enter a **brief description of the documentation**
32. Select **Next** to go to **Budget Incumbents**



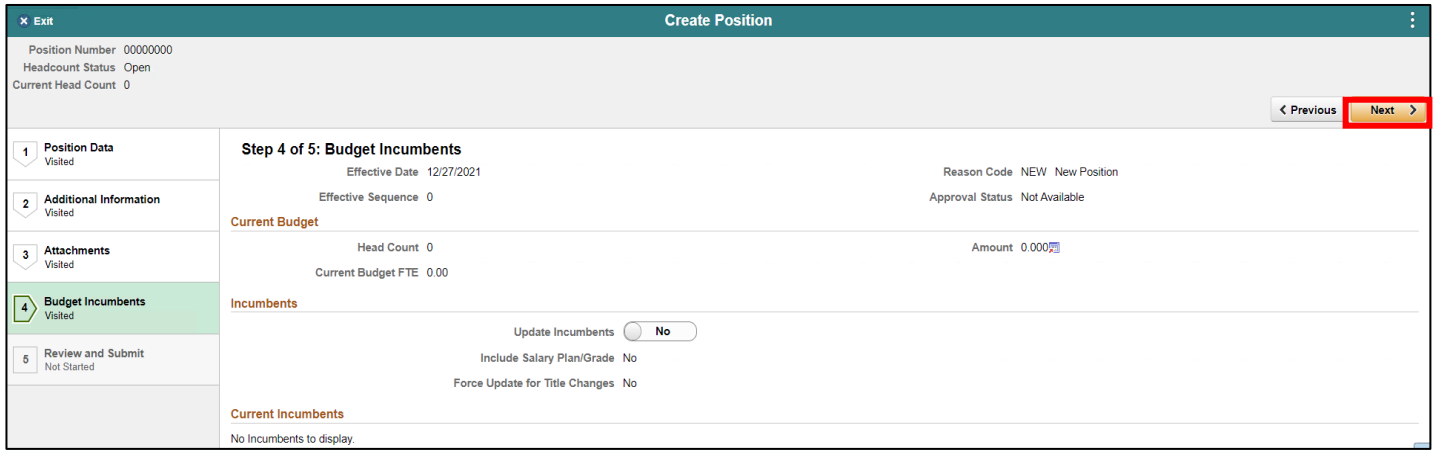


Lecture 1: Create New Position Cont'd

In the **Budget Incumbents** page, users will review and leave defaulted items as is.

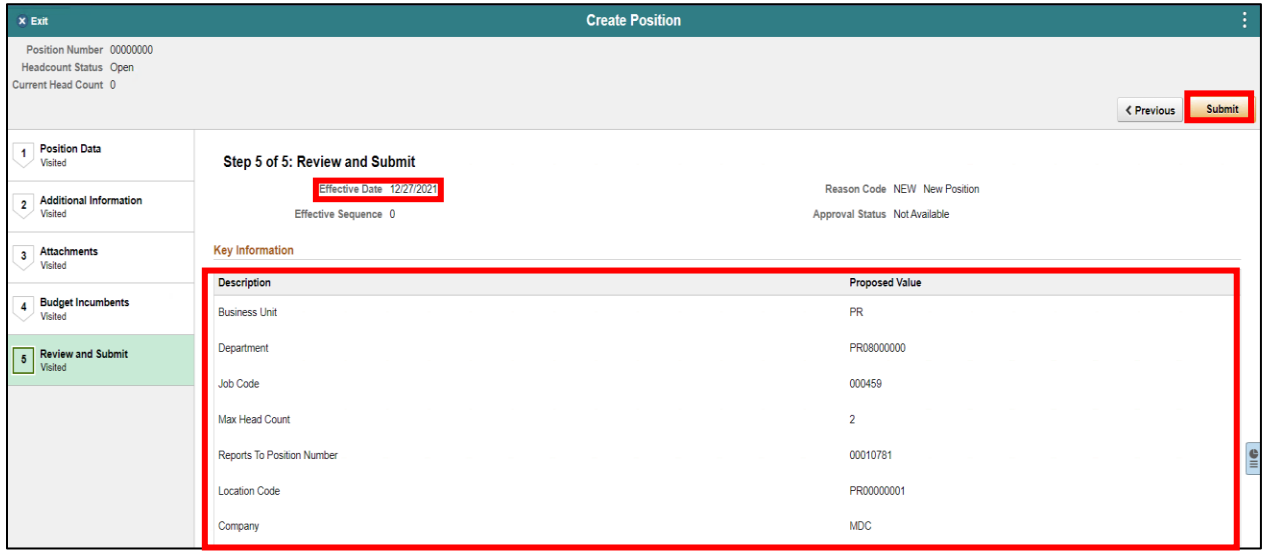
- **Update Incumbents** (Leave as Defaulted)
  - **NOTE:** When there are no incumbents in the position it is required to have the **Update Incumbents** field set to **No** before submitting the request.

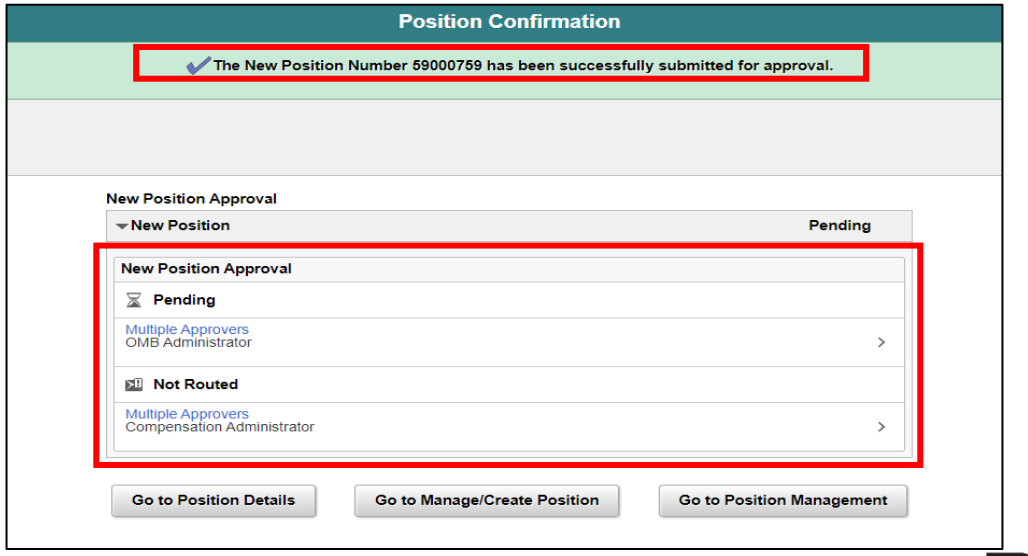
33. Select **Next** to go to **Review and Submit**.



Lecture 1: Create New Position Cont'd

1. In the **Review and Submit** page, review the key information and select **Submit**. The **New Position Number has been issued**.
   - 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.

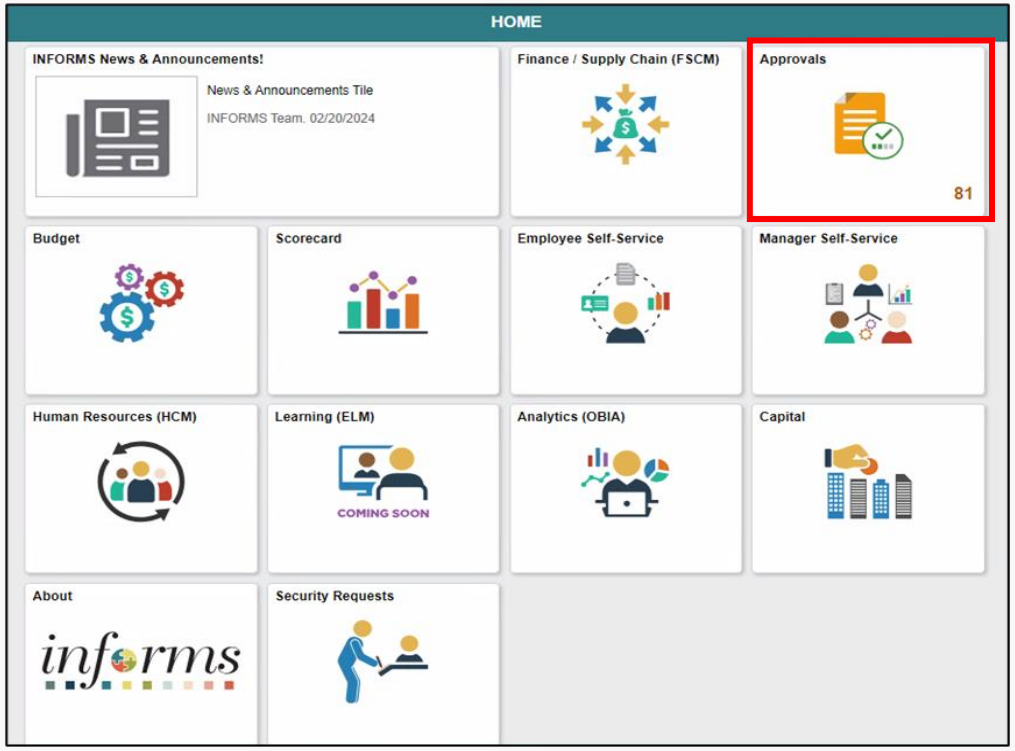




Lecture 2: Budget Approval

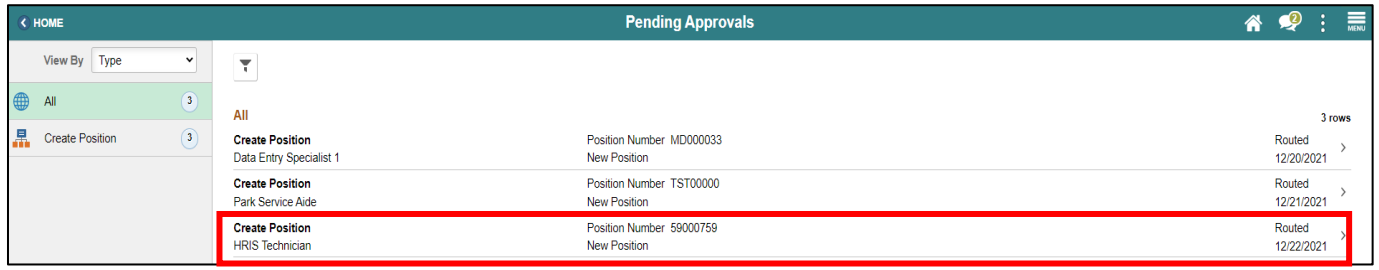
The OMB Budget Administrator and the Constitutional Office Department Budget Administrator are responsible for approving new position requests within INFORMS.

Navigate to Approvals: Select **Approvals**

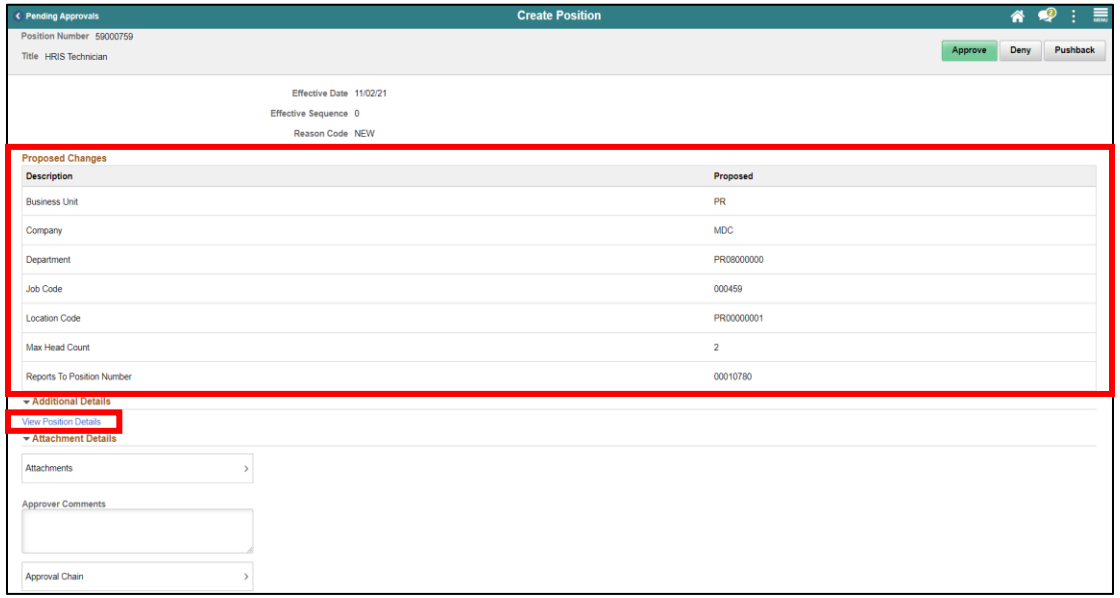


Lecture 2: Budget Approval Cont'd

1. Select the **New Position pending approval**

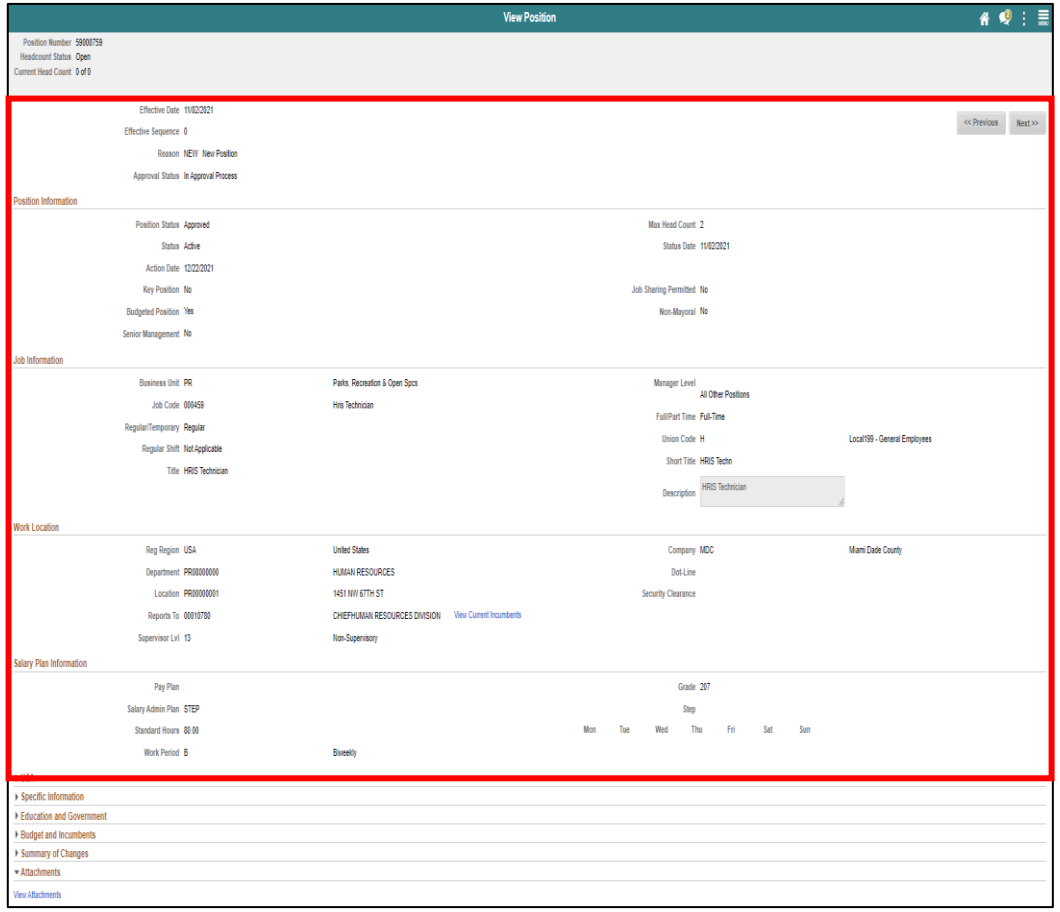


2. Select **View Position Details** hyperlink to view the **details of the new position**



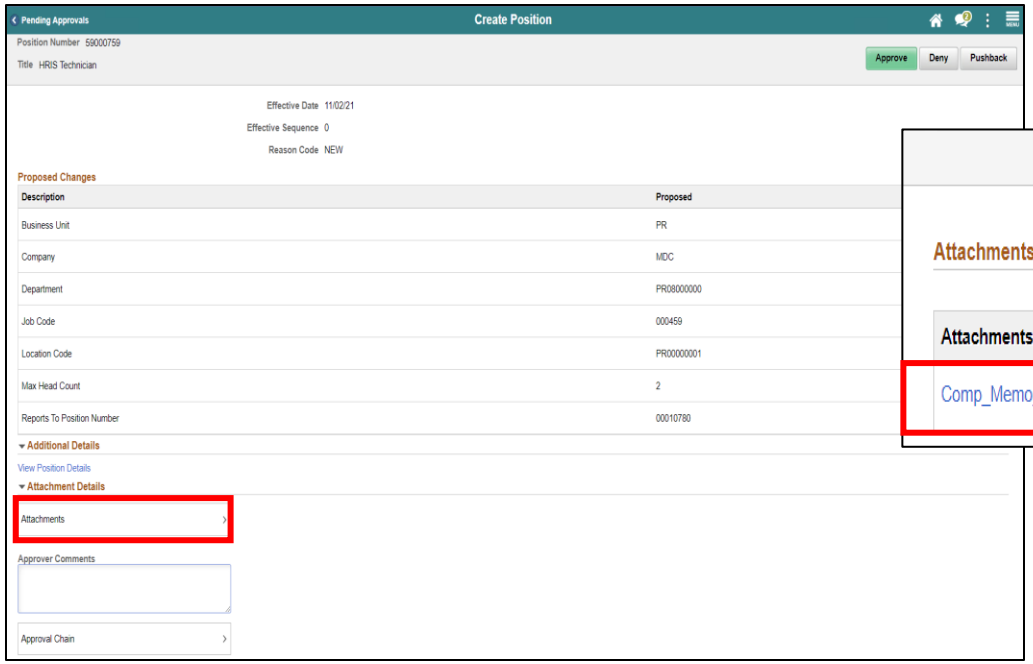
Lecture 2: Budget Approval Cont'd

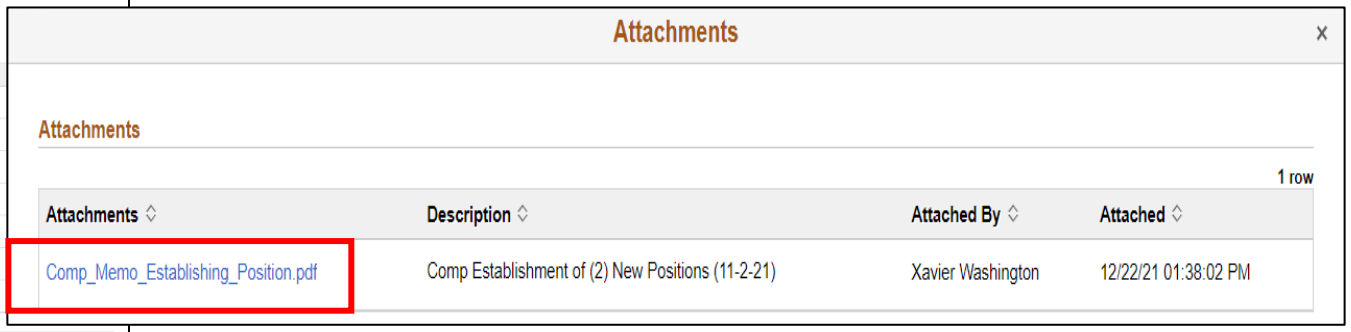
A new tab will open displaying all the details of the new position request.



Lecture 2: Budget Approval Cont'd

3. Select **Attachments** to view any supporting documentation added to the request.
4. Select the **attachment hyperlink** to view the supporting documentation.

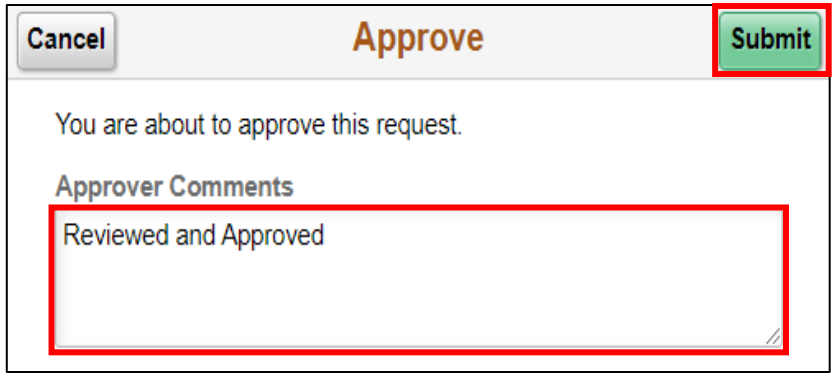


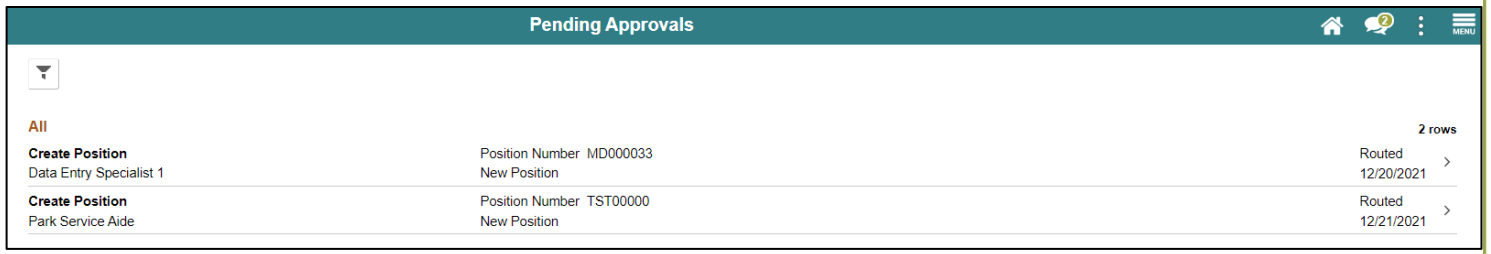


Lecture 2: Budget Approval Cont'd

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**.
   - **NOTE:** The Position is no longer in the Pending Approvals page.





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**

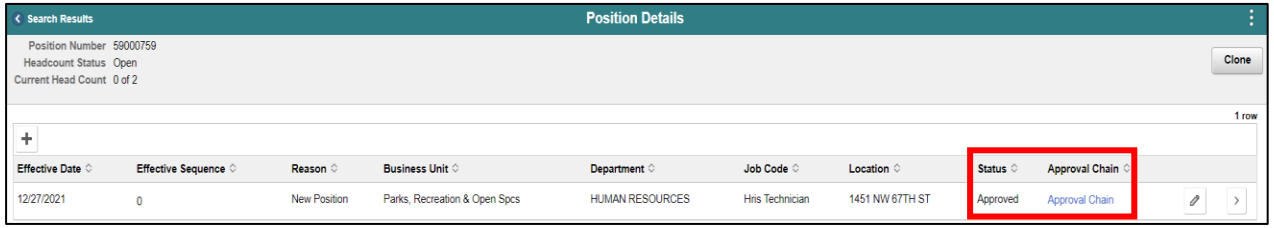
1. In the **Position Number** field, enter **the position number being validated**
2. Select **Search**

Lecture 3: Validate Position Cont'd

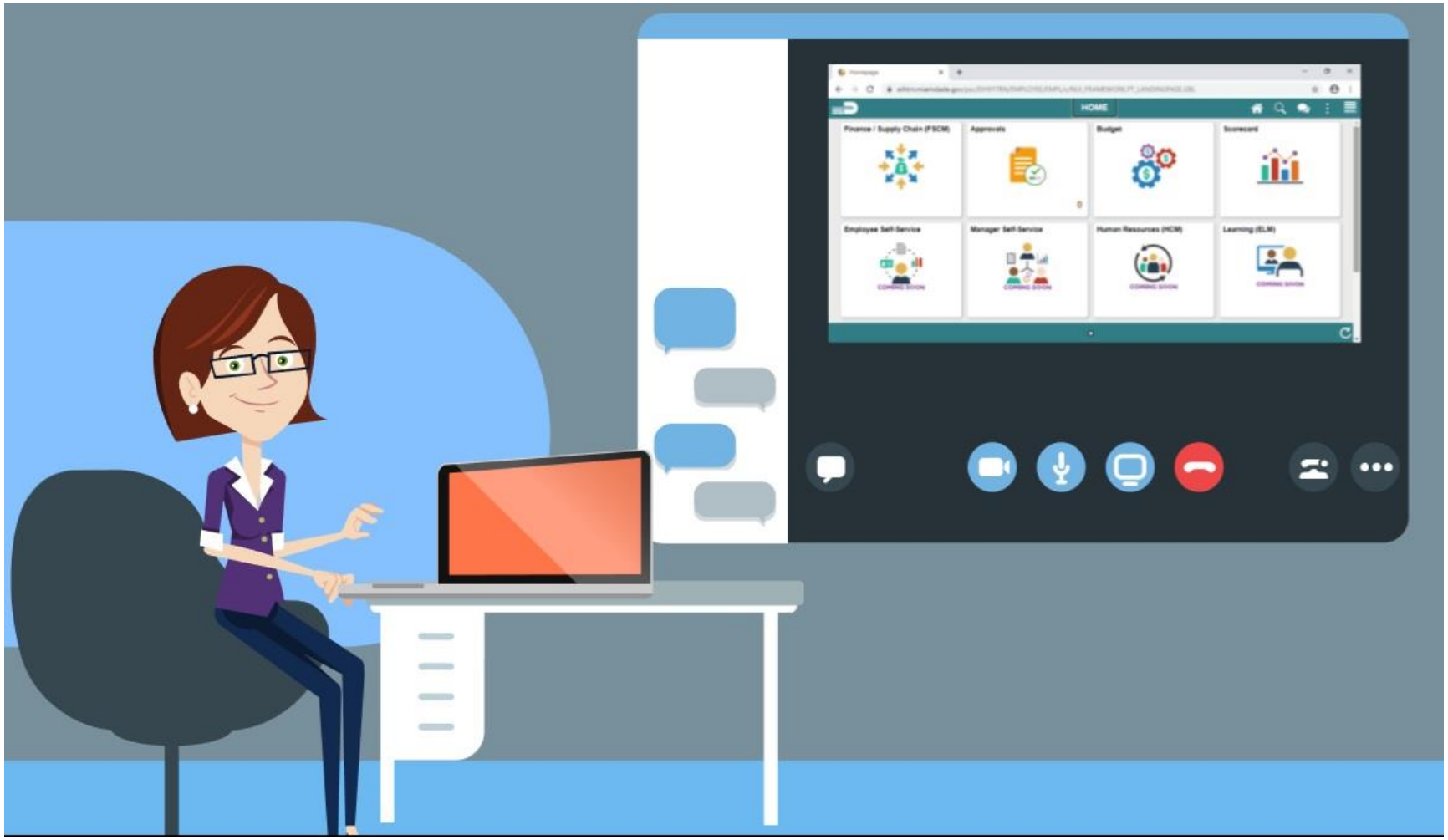
3. Select the **position being validated**
   - The Status displays **Approved**

4. Select the **Approval Chain hyperlink** link to view the approvers
   - The appropriate approver and the time and dates the request was approved.

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



Lesson 1: Activities and Exercises



Lesson 1: 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 Data

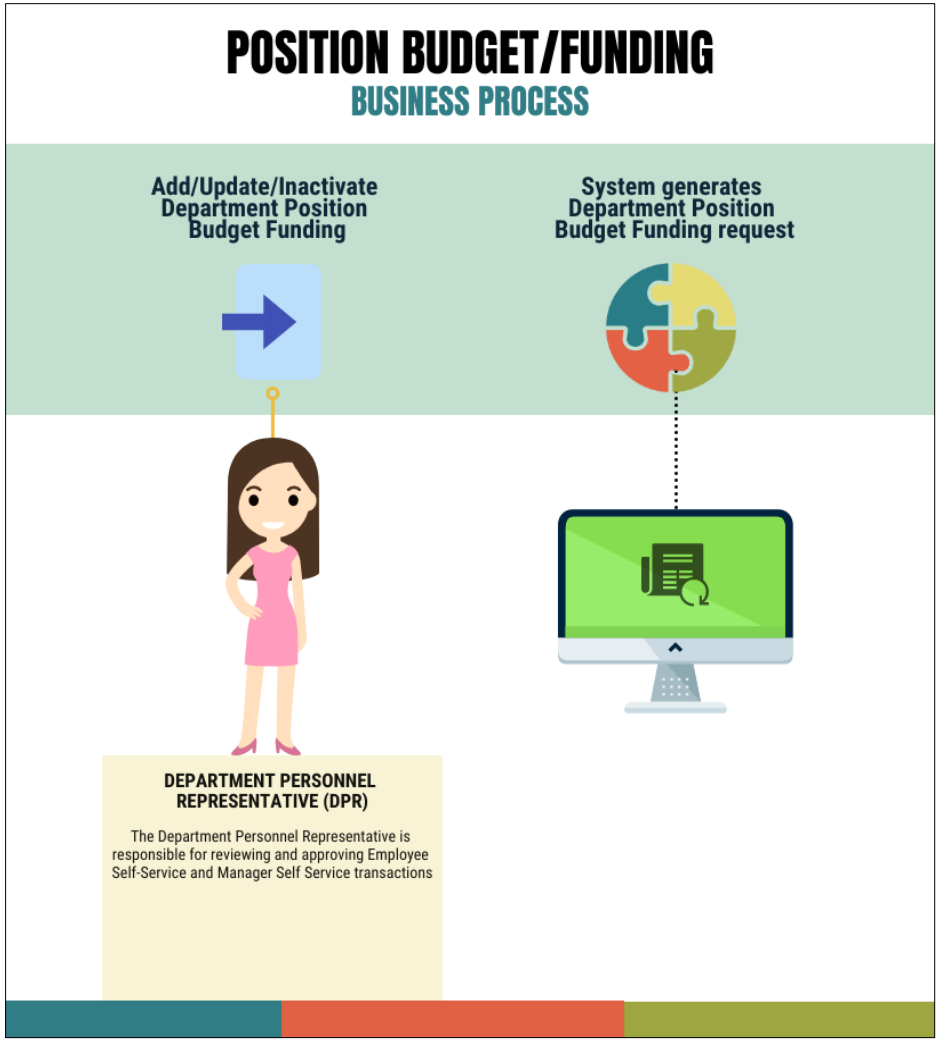
At the conclusion of this lesson, participants will be able to:

- 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: Key Terms

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

Lesson 2: Define Department/Position Budget Data



Lesson 2: Define Department/Position Budget Data

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

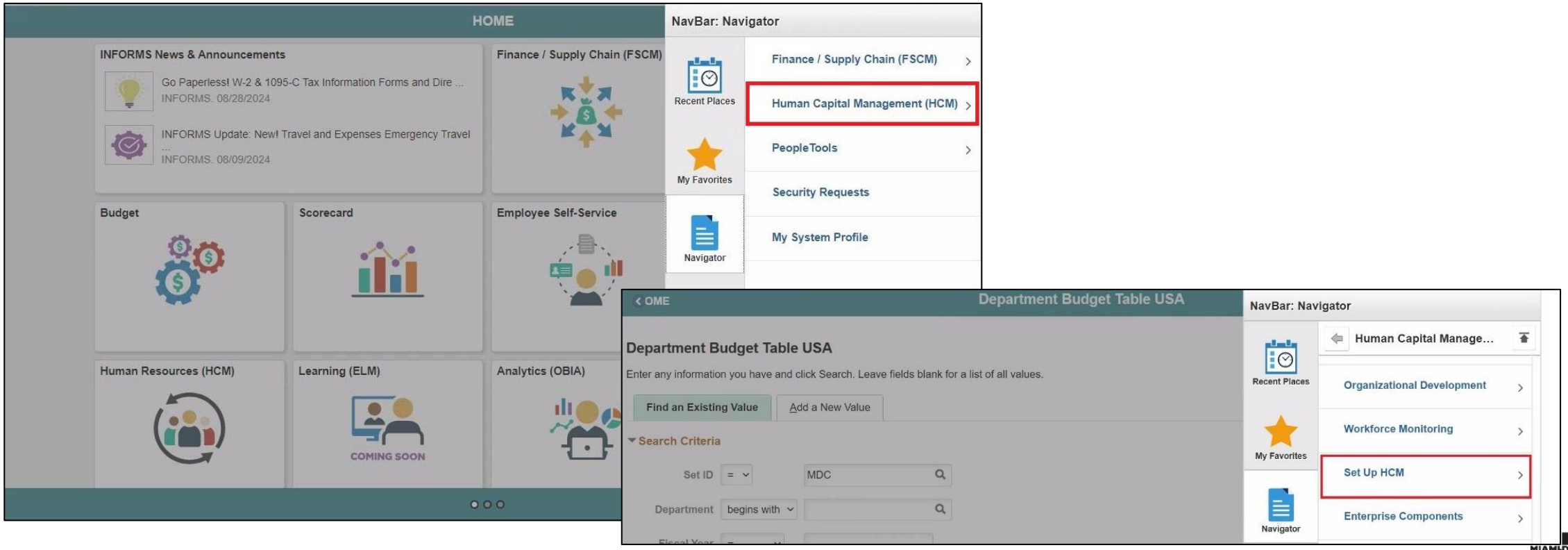
- Dept Budget Date – the Fiscal Year and Budget Begin/End dates as well as the Suspense Combination code are defined here.
- Dept Budget Defaults – the Funding Defaults and Account Overrides are defined here.
- Dept Budget Earnings, Dept Budget Deduction, and Dept Budget Taxes tabs must contain the same 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.

Lesson 2: Define Department/Position Budget Data Cont'd

- The main Department Budget Table USA tabs needed **when adding the budget funding for a new position** are the following:
  - Dept Budget Date
    - The position budget date needs to coincide with the beginning of the fiscal year.
  - 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
    - This budget tab is needed **when inactivating the budget funding.**
  - Dept Budget Deductions
  - Dept Budget Taxes
- **NOTE:** It is important to ensure that when updating the combination code for a position the distribution percentage and combination code are the same across all three; Dept Budget Earnings, Dept Budget Deductions, and Dept Budget Taxes tabs.

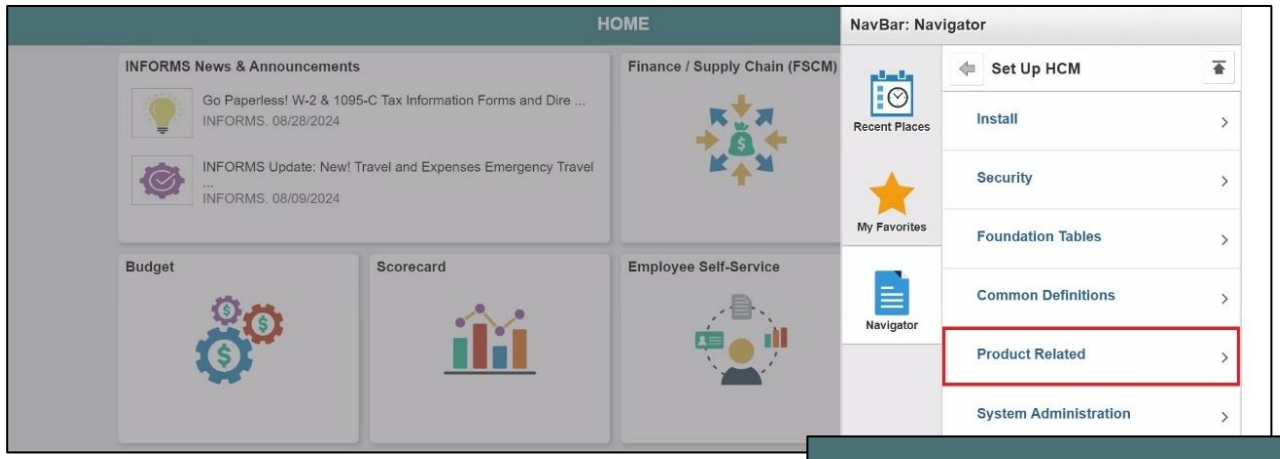
Lecture 1: Add Position Budget Funding

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



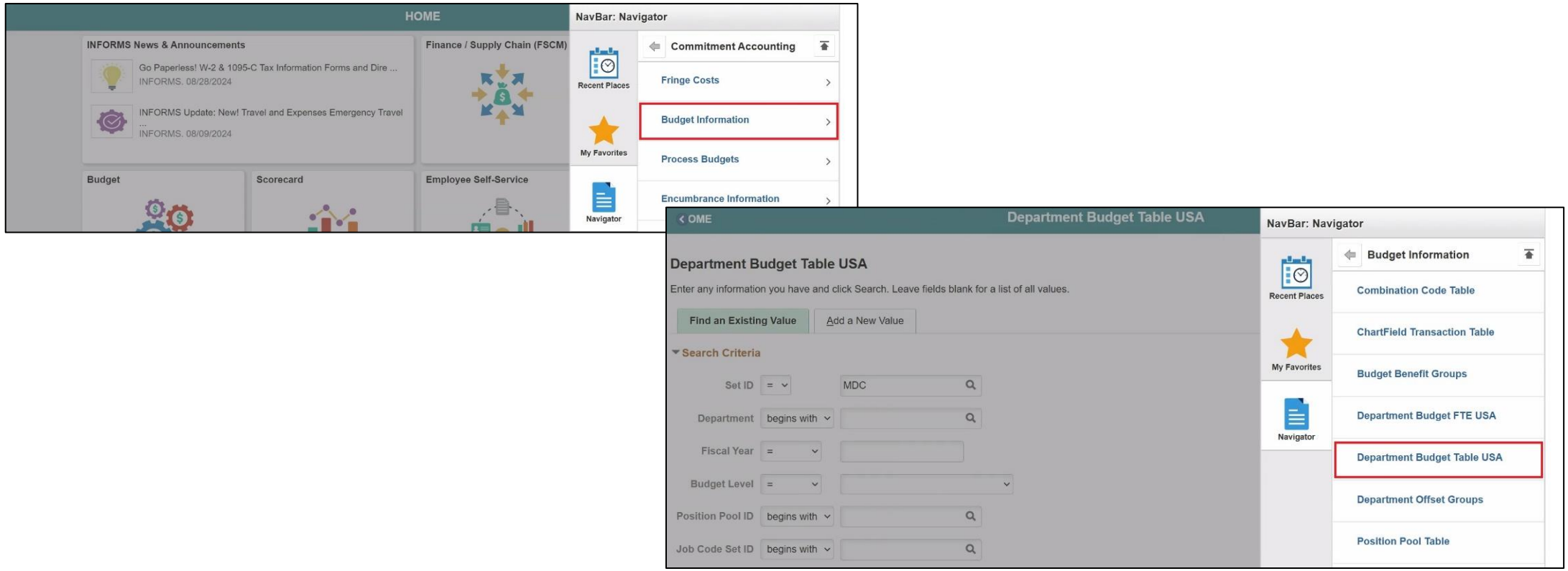
Lecture 1: Add Position Budget Funding Cont'd

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



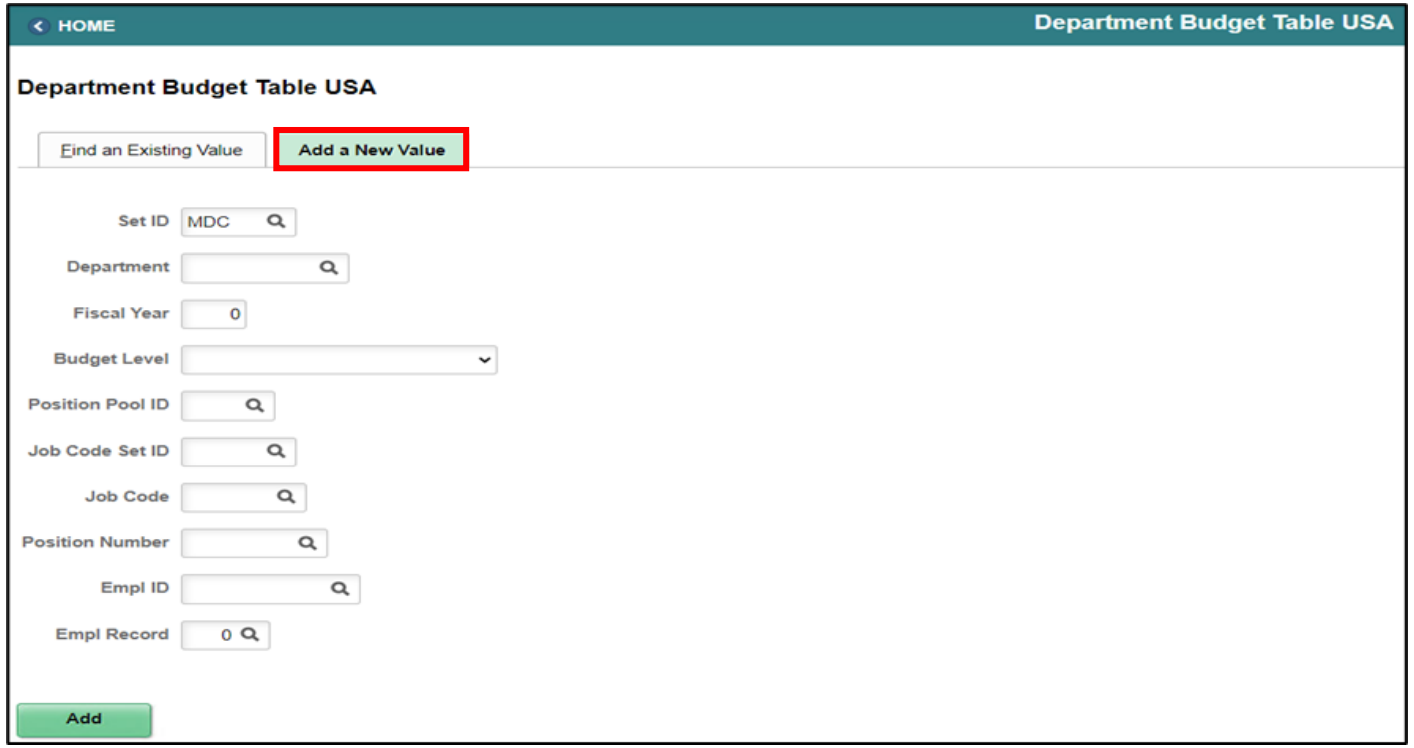
Lecture 1: Add Position Budget Funding Cont'd

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



Lecture 1: Add Position Budget Funding Cont'd

1. Select the **Add a New Value** tab to add the budget funding for the new position.



Lecture 1: Add Position Budget Funding Cont'd

2. In the **Set ID** field, ensure it is set to **the Company/Department specific Set ID.**
3. In the **Department field,** enter the **Department ID ChartField used when creating the new position.**
   - **NOTE:** The Department ID selected must be the same one used when creating the new position. **MDC or Constitutional Office Business Units should not use budgetary level Department IDs**.
4. In the **Fiscal Year** field, enter the **Fiscal Year when the new budget funding will take place.**

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

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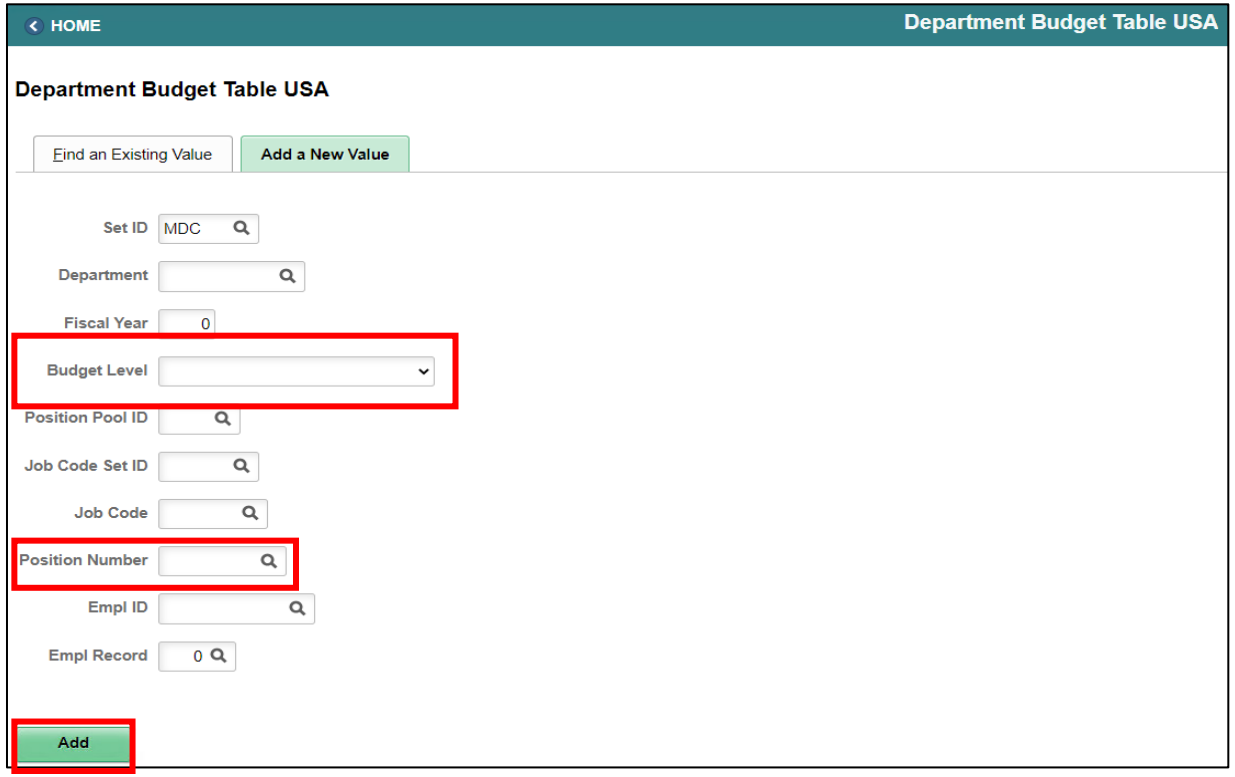
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

Lecture 1: Add Position Budget Funding Cont'd

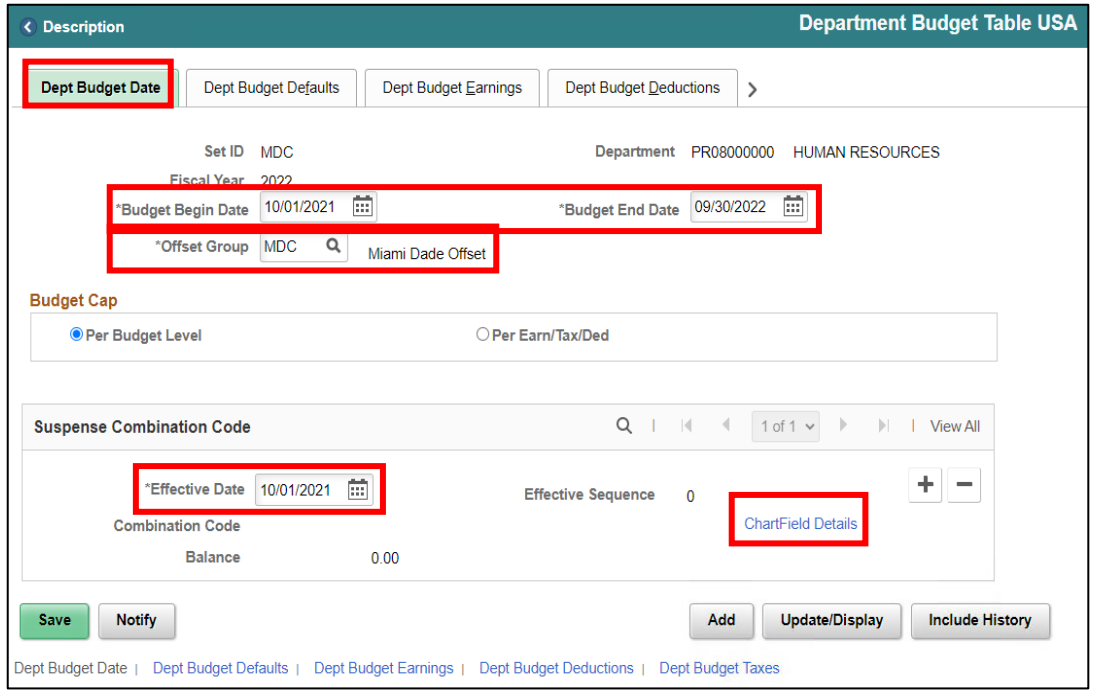
5. In the **Budget Level** field, select **Position**.
   - **NOTE:** Currently the budget funding is at the position level which means that on the job record there is a position assigned to employees.
6. In the **Position Number** field, enter the **Position Number for the new position that requires the budget funding**.
7. Select **Add**.



Lecture 1: Add Position Budget Funding Cont'd

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

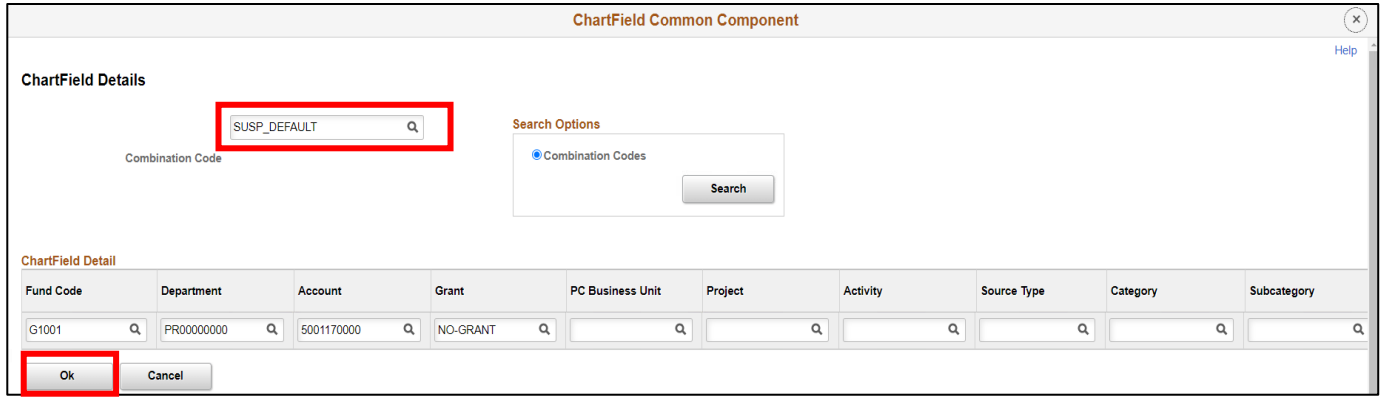
1. Select the **Dept Budget Date** tab.
2. In the ***Budget Begin Date** and ***Budget End Date**, to enter the Beginning and End Date for the Fiscal Year.
3. In the ***Offset Group**, select **MDC** for Miami Dade Offset.
4. In the **Suspense Combination Code** section, in the ***Effective Date** field **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 ChartField Common Component pop-up will be displayed.

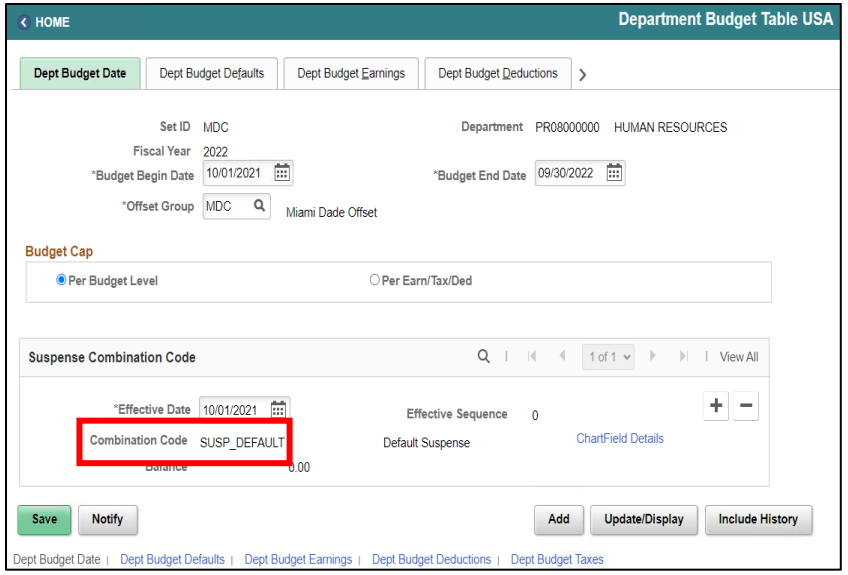


Lecture 1: Add Position Budget Funding Cont'd

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**.

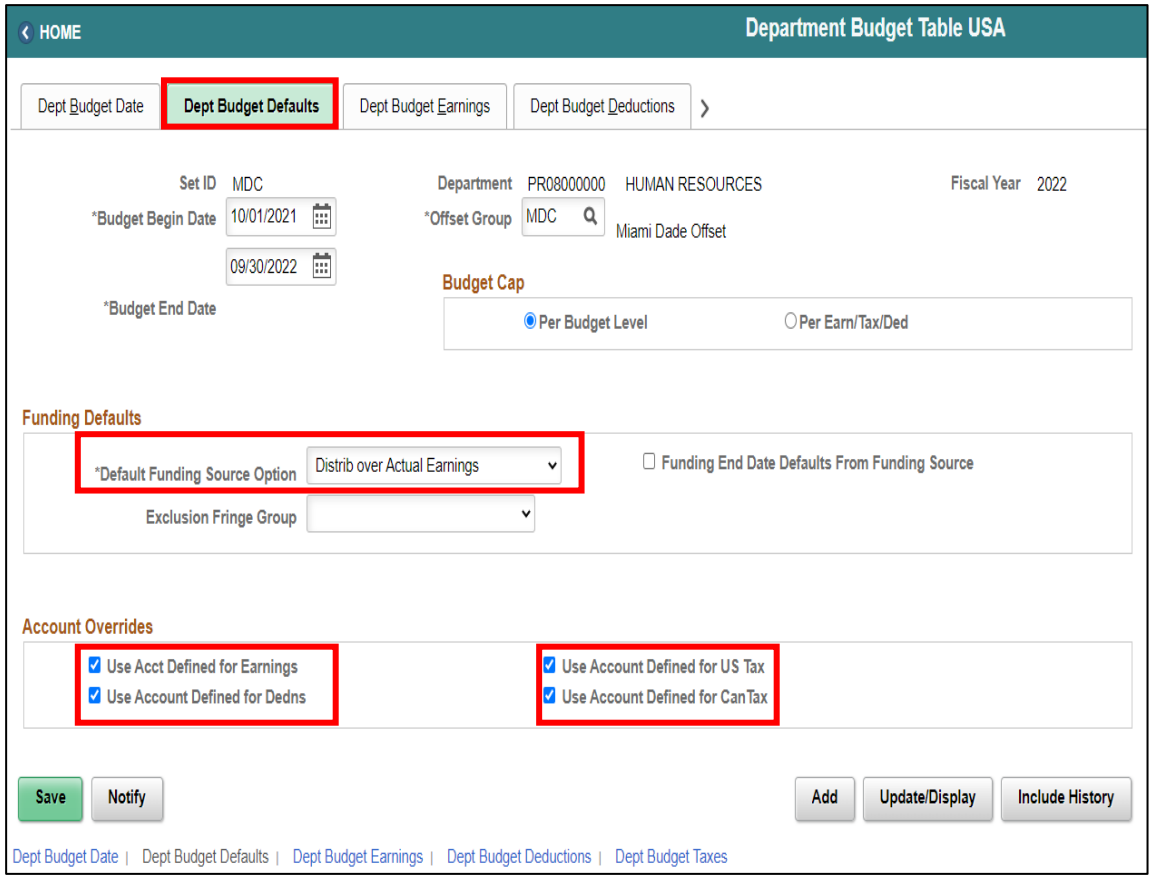
Notice the **Suspense Combination Code** loaded. Review to ensure all fields are correct.





Lecture 1: Add Position Budget Funding Cont'd

1. 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**

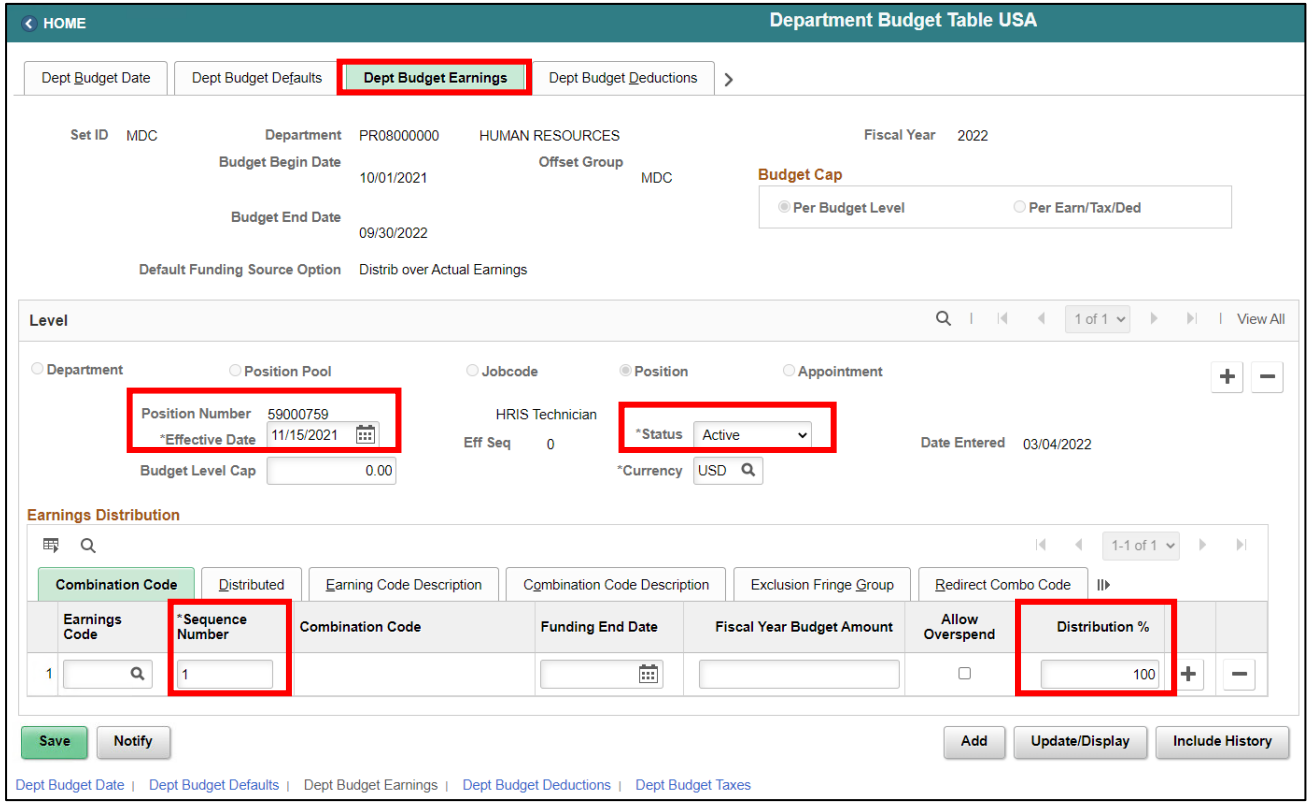


Lecture 1: Add Position Budget Funding Cont'd

1. Select the **Dept Budget Earnings** tab
   - The **Position number** is added to the budget funding
2. 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.

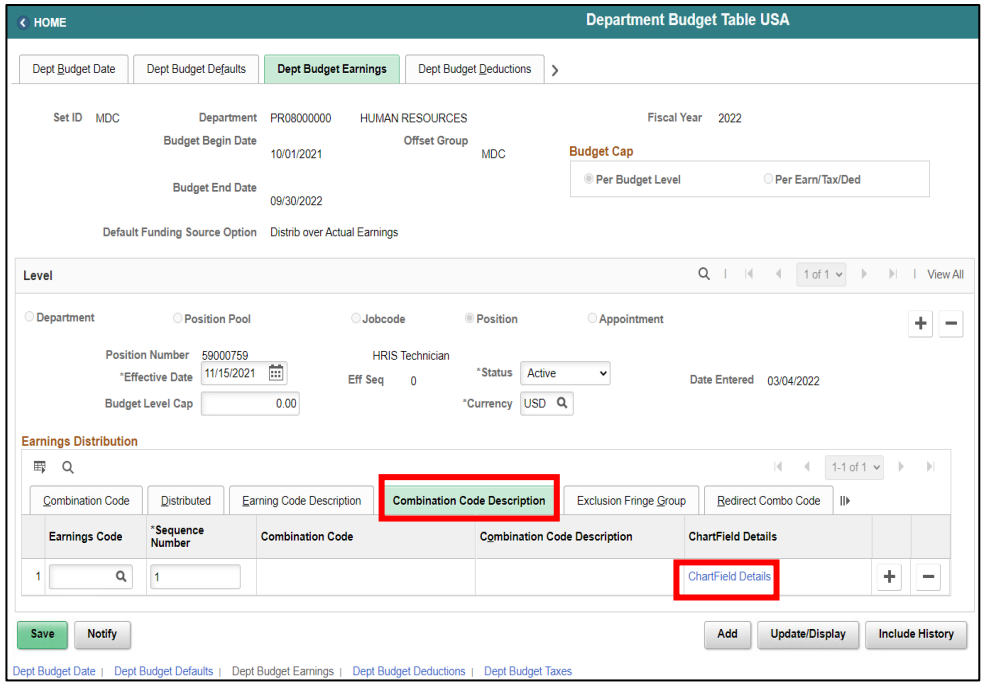
Lecture 1: Add Position Budget Funding Cont'd

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



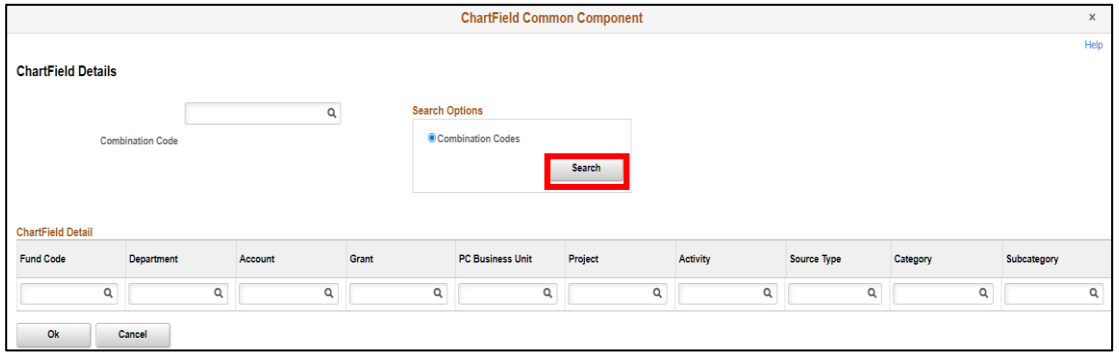
Lecture 1: Add Position Budget Funding Cont'd

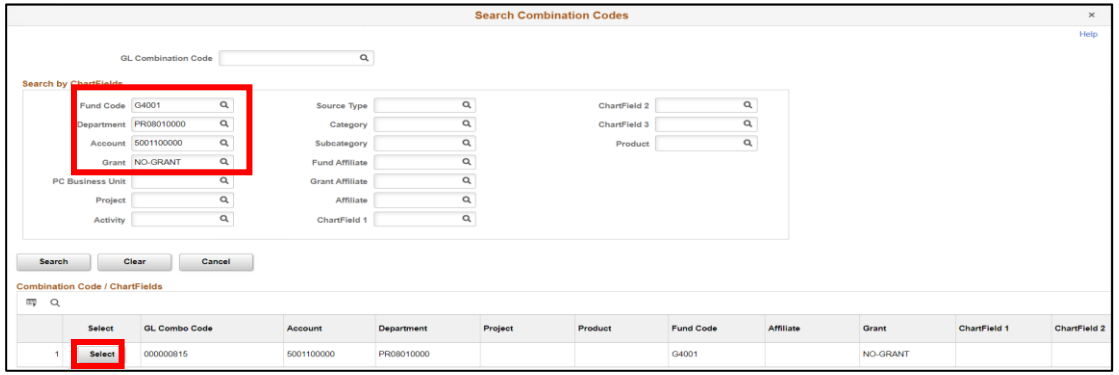
8. Select the **Combination Code Description** tab.
9. Select the **ChartField Details hyperlink** to select the Combination Code.
   - The **ChartField Common Component** is now displayed. The Combination Code consists of a list of selected ChartField strings with the Fund Code, Department, Account, 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.

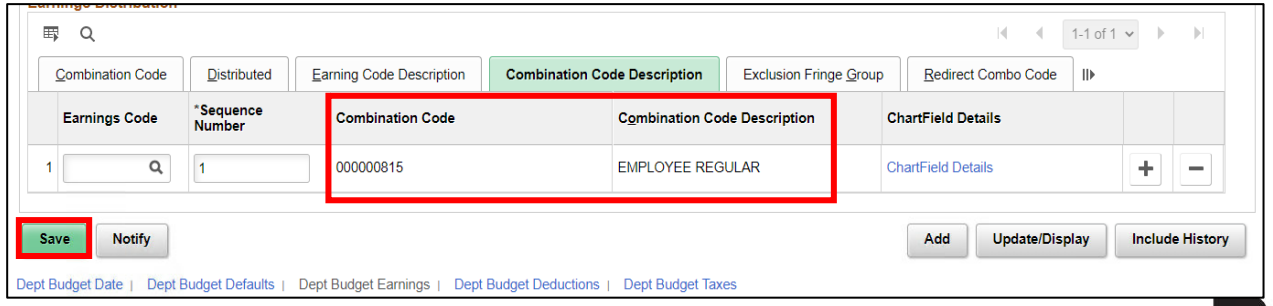


Lecture 1: Add Position Budget Funding Cont'd

10. Select **Search** to locate the Combination Code
11. Enter the **ChartFields** and select **Search**
    - The Combination Code ChartFields displays
12. Select the **Select** button **to load the Combination Code**
    - The Combination Code is now loaded in the Combination Code field.
13. Select **Save**

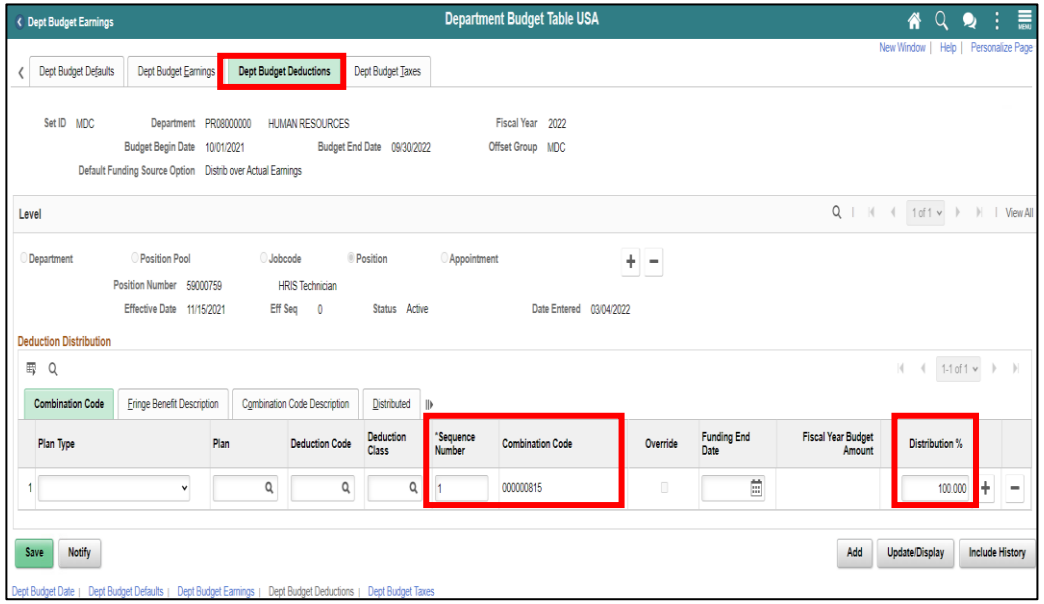


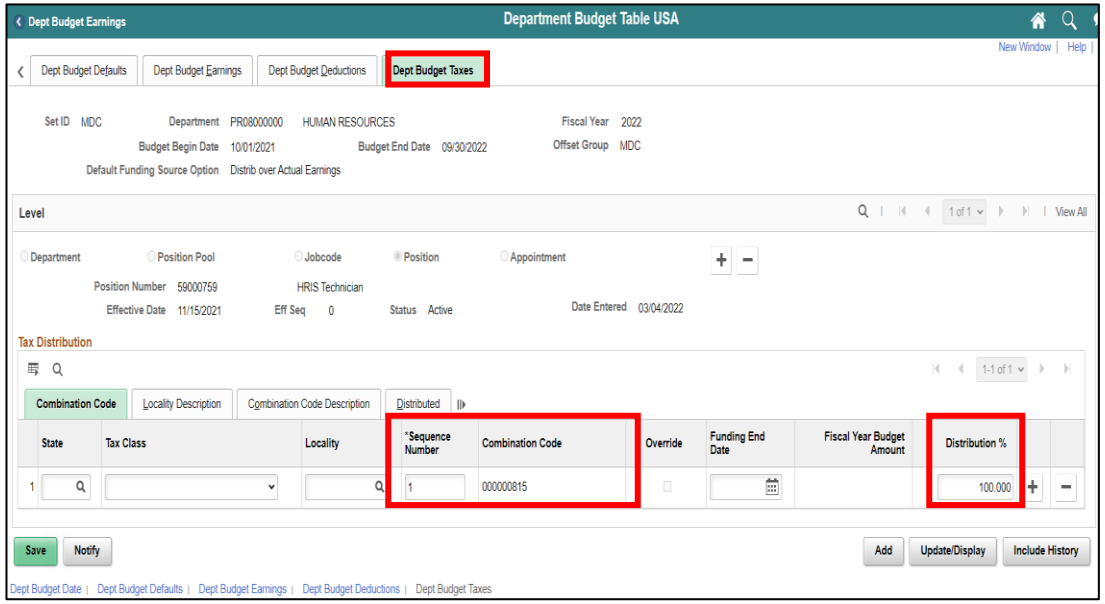




Lecture 1: Add Position Budget Funding Cont'd

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.

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 specific Department's Set ID.**
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.**
5. In the **Position Numbe**r field, enter the **Position Number for the active position that requires the new budget funding.**
6. Select **Search.**

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

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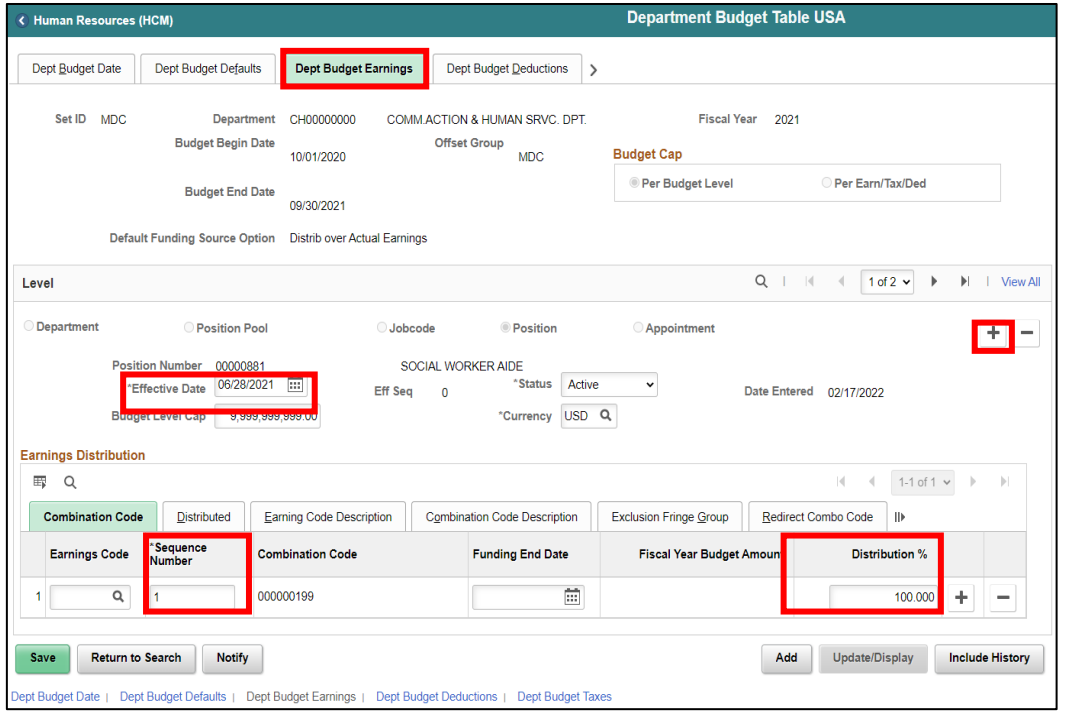
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

Lecture 2: Update Position Budget Funding Cont'd

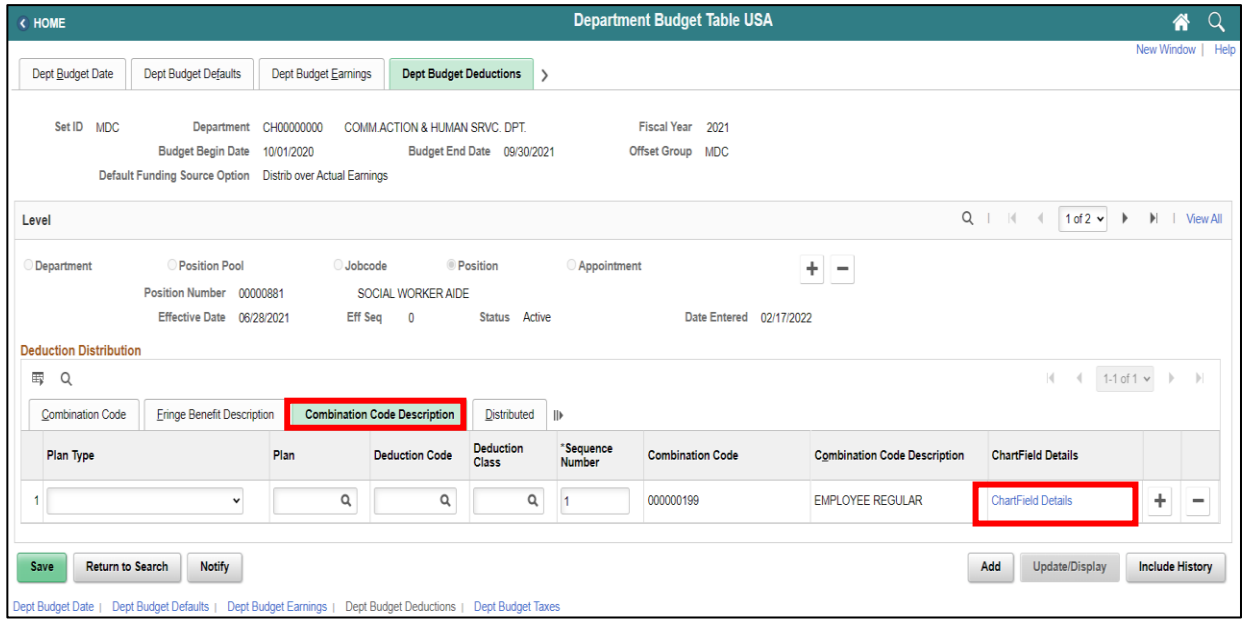
In the **Dept Budget Earnings** page users are responsible for updating the ***Effective Date, *Sequence Number, Distribution percentage** and the new **Combination Code** of the position.

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.**



Lecture 2: Update Position Budget Funding Cont'd

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.

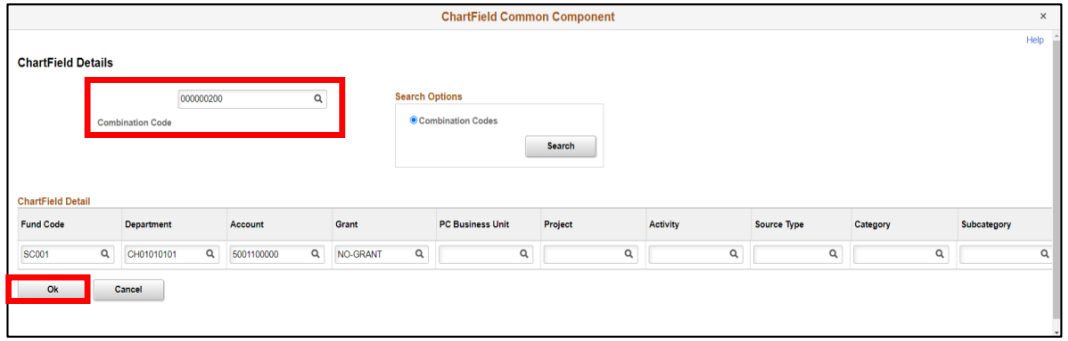


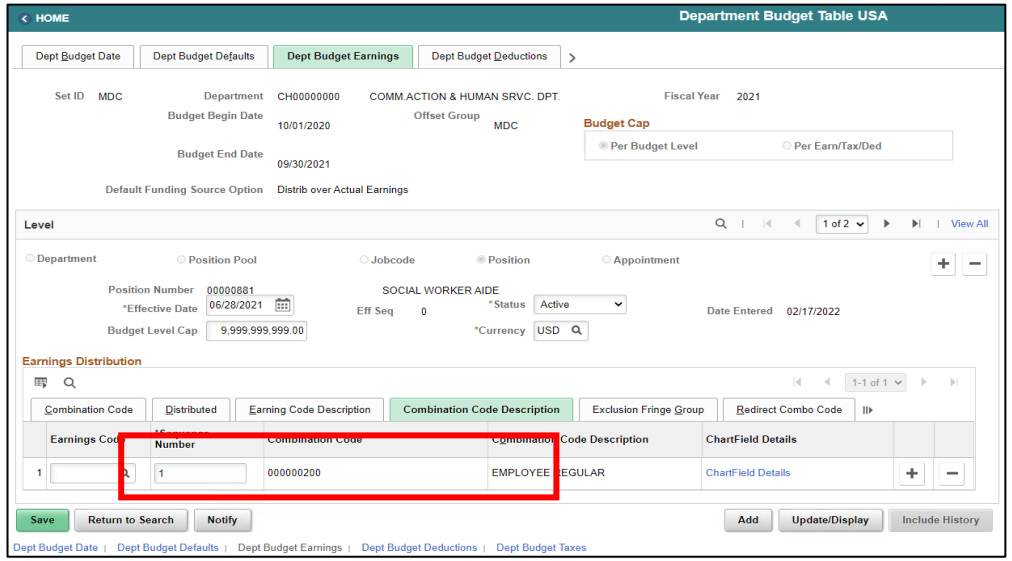
Lecture 2: Update Position Budget Funding Cont'd

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

- **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.

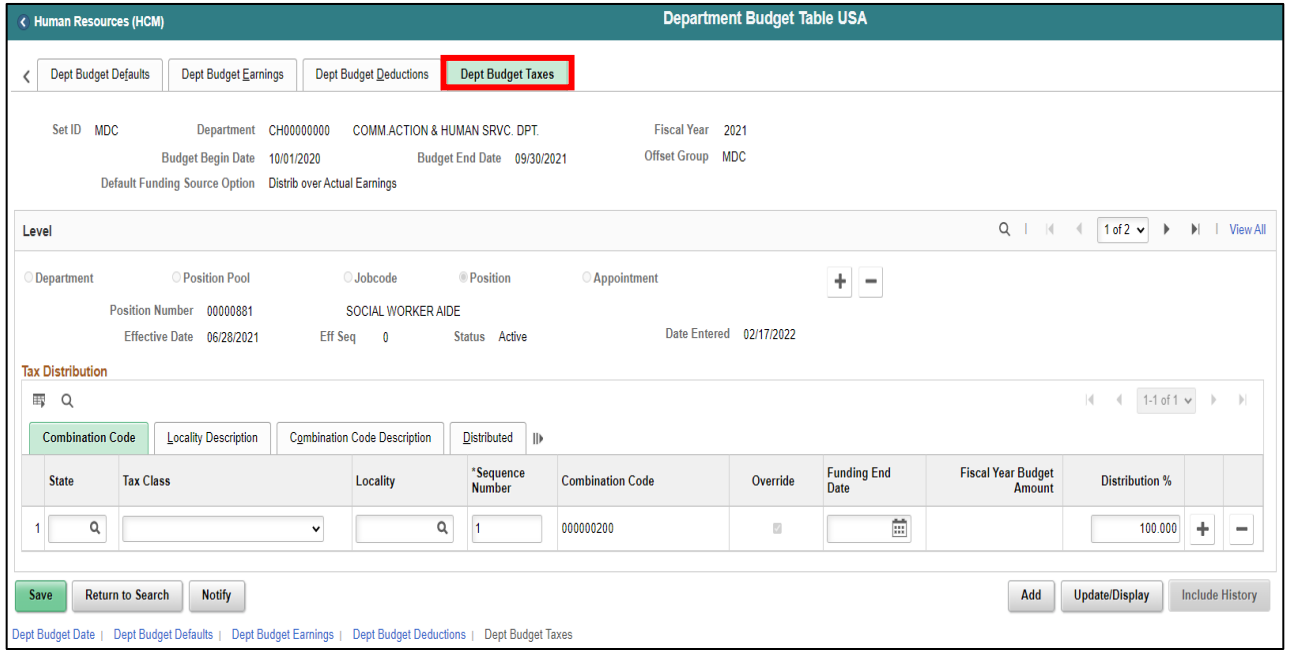




Lecture 2: Update Position Budget Funding Cont'd

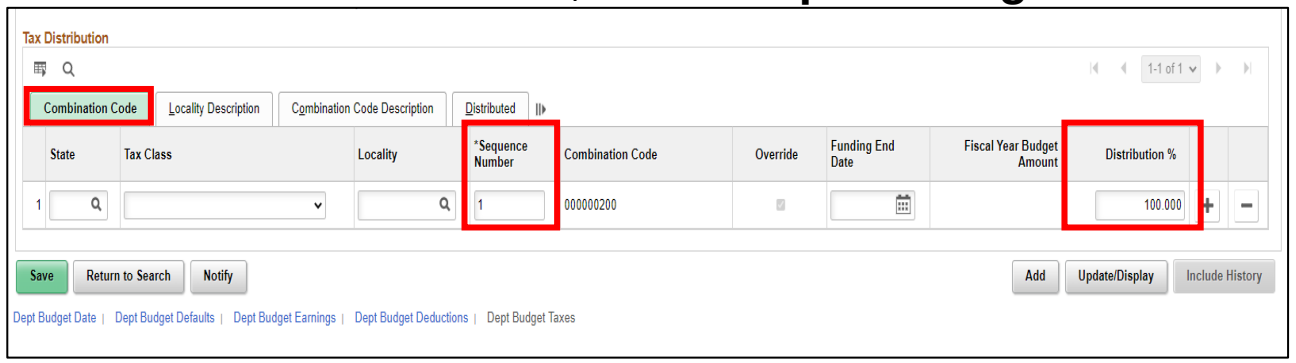
In the **Dept Budget Taxes** page users are responsible for updating the ***Sequence Number**, **Distribution percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Taxes** tab.

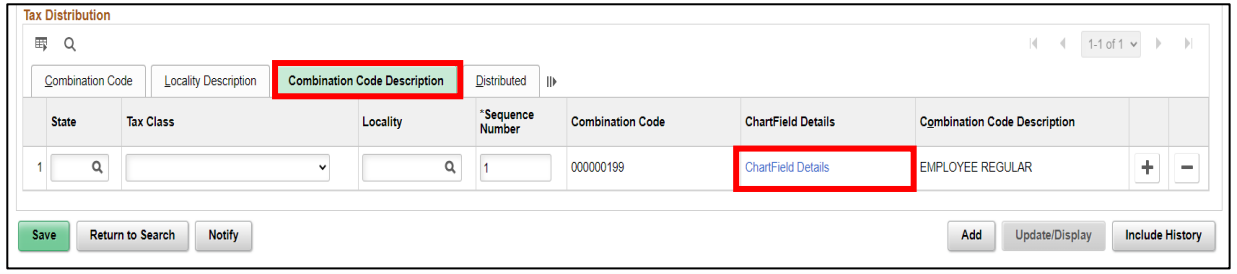


Lecture 2: Update Position Budget Funding Cont'd

2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1.**
3. In the **Distribution %** field, enter the **percentage of the distribution.**



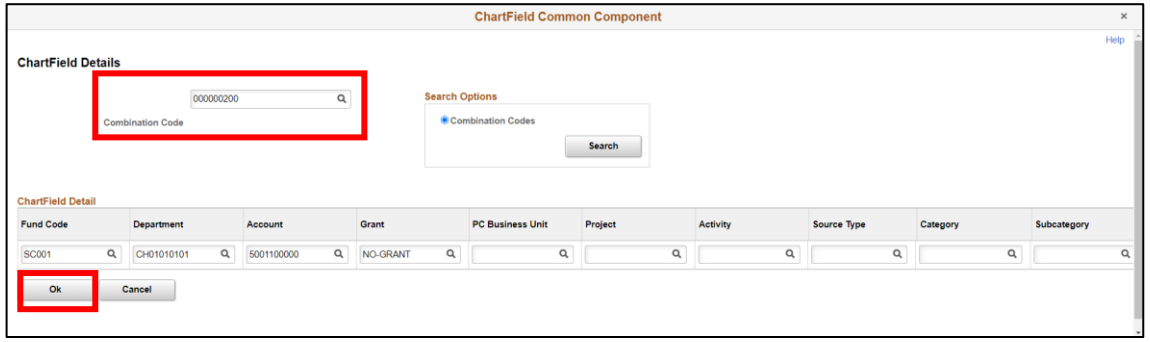
4. Select the **Combination Code Description** tab to update the current budget funding and select the new Combination Code.
5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

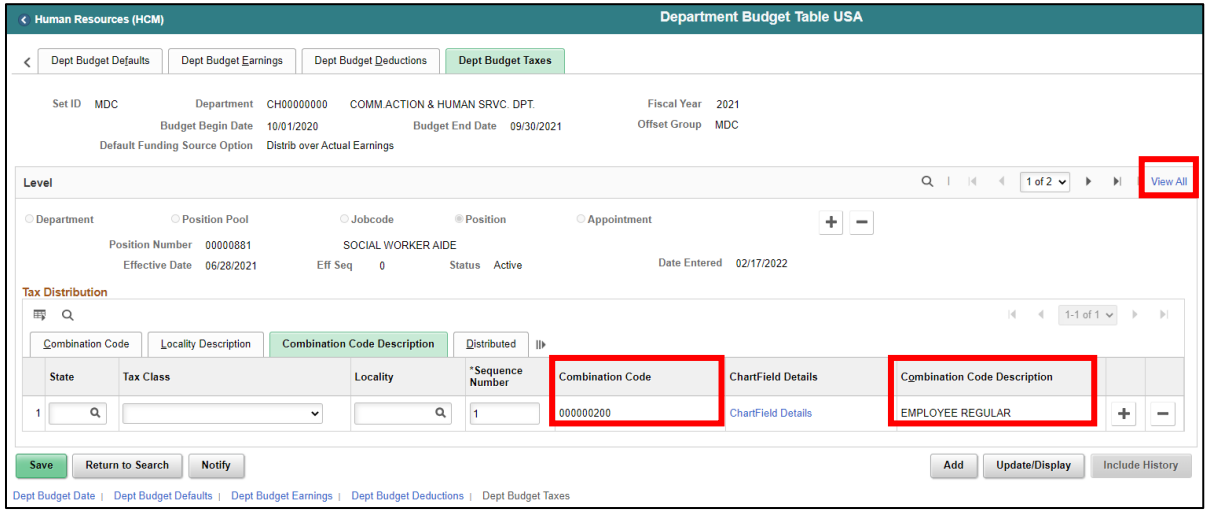


Lecture 2: Update Position Budget Funding Cont'd

The **ChartField Common Component** is now displayed

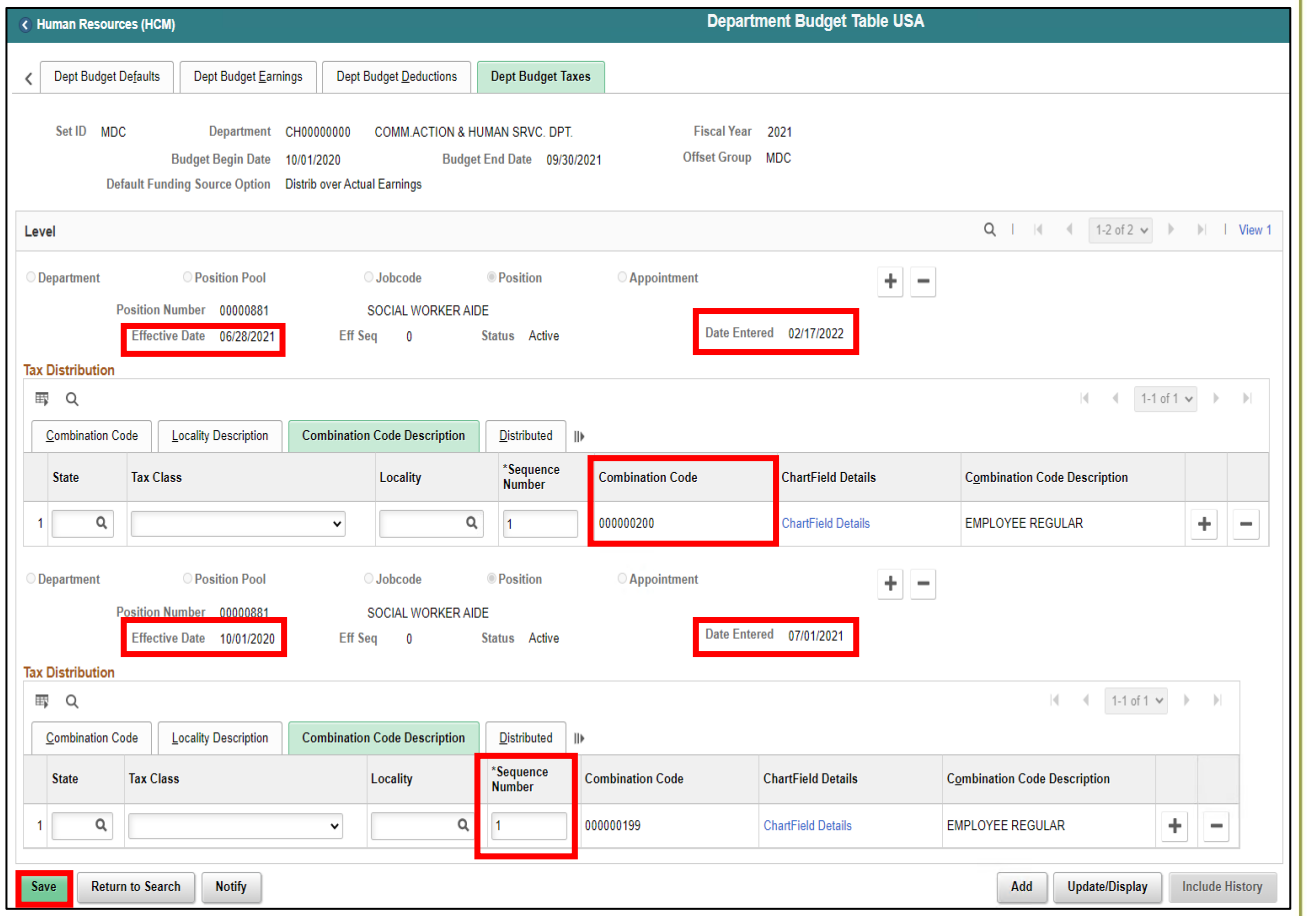
6. In the **Combination Code** field, enter the same **Combination Code entered on the Dept Budget Earnings page**
7. Select **Ok**
   - The updated Combination Code and Combination Code Description are listed
8. Select the **View All** hyperlink to view the budget funding changes





Lecture 2: Update Position Budget Funding Cont'd

9. Review the changes and select **Save**
   - The page expands to display new and historic information
     - Notice the two different Effective Dates, Date Entered, and the Combination Code of the two records
10. The Updating Budget Funding process is now complete



Lecture 3: Inactivate Position 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**

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 Company/Department's Set ID.**
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 budget funding is to become inactive.**
5. In the **Position Number** field, enter the **Position Number** of the position that is being inactivated.
6. Select **Search.**

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 CO Departments

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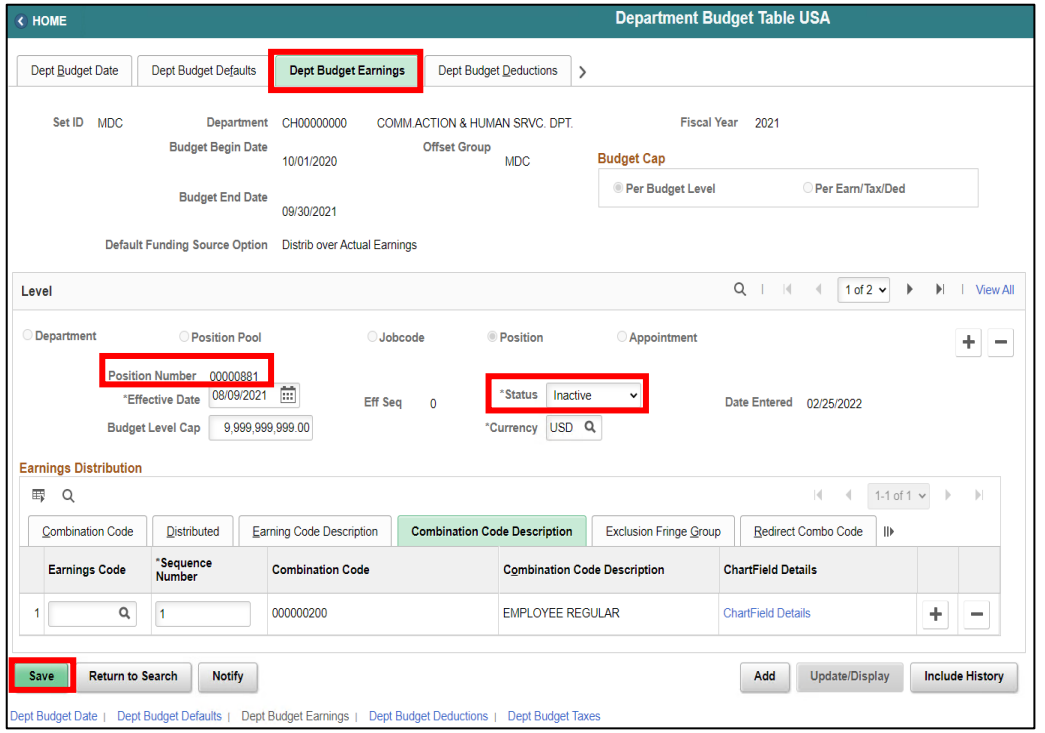
2026	FY 25-26 (10/1/25 – 9/30/26)
2027	FY 26-27 (10/1/26 – 9/30/27)

Lecture 3: Inactivate Position Budget Funding Cont'd

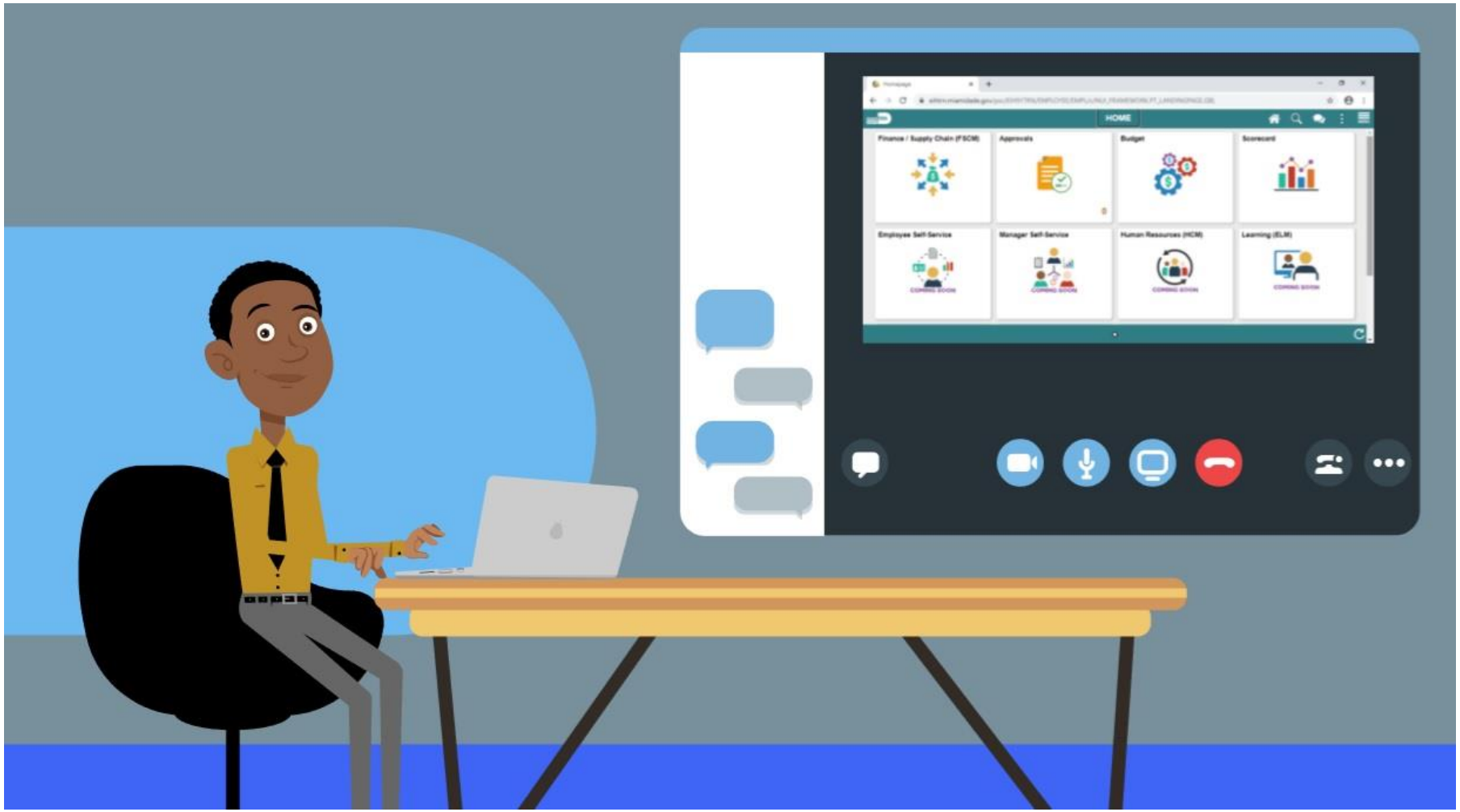
Select the **Dept Budget Earnings** tab.

7. 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 you intend to inactivate plus 1 and must fall within the Budget Begin Date and Budget End Date.
8. In the ***Status** field, select **Inactive**.
9. Select **Save**.

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



Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Now that you have completed the lesson, you have:

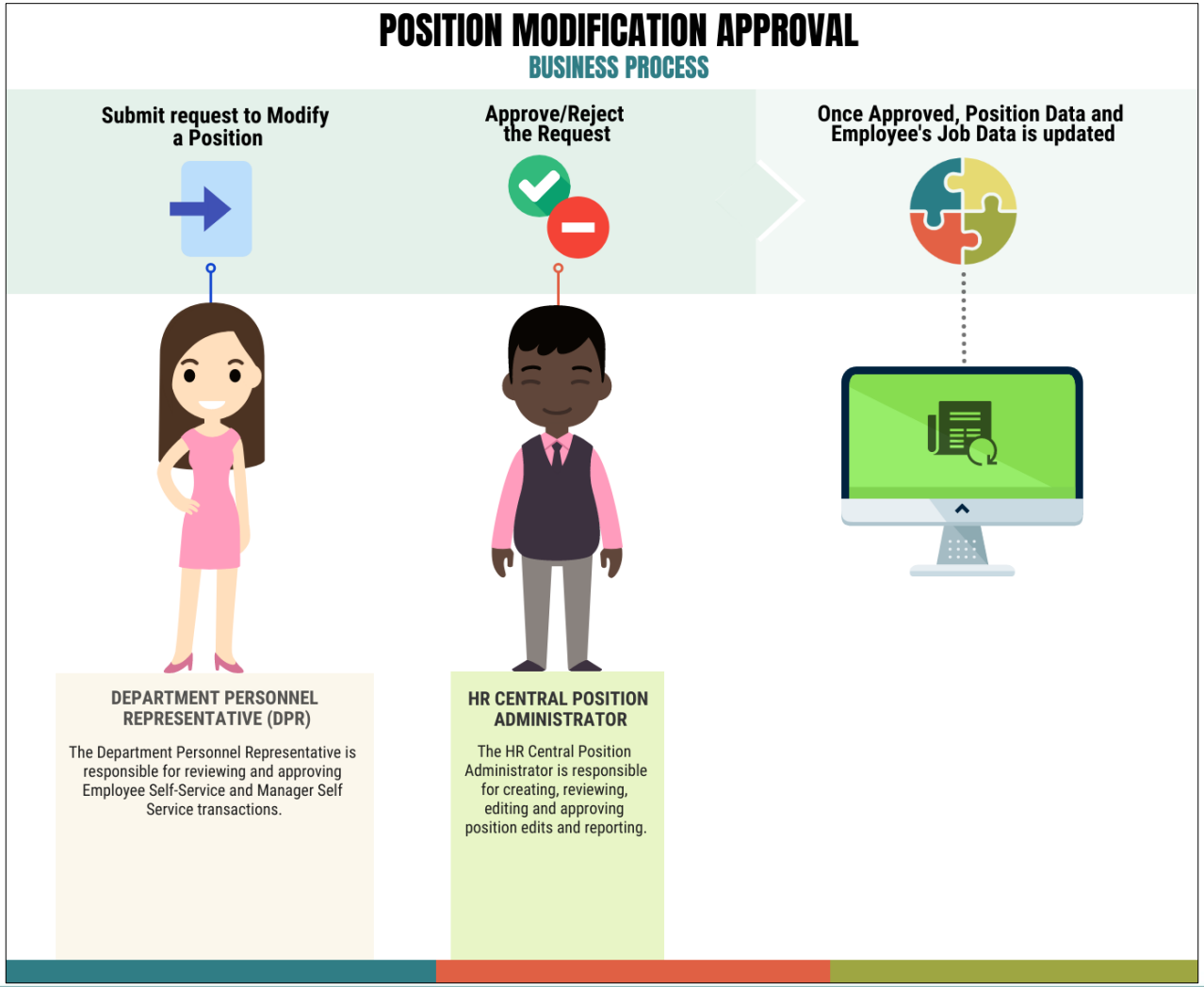
- Learned how Department budget funding is established for new positions
- Learned how to update Department budget funding on existing positions
- Learned how to inactivate Department budget funding for a position

Lesson 3: Submitting Position Change

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

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

Lesson 3: Submitting Position Change Cont'd



Lesson 3: Key Terms

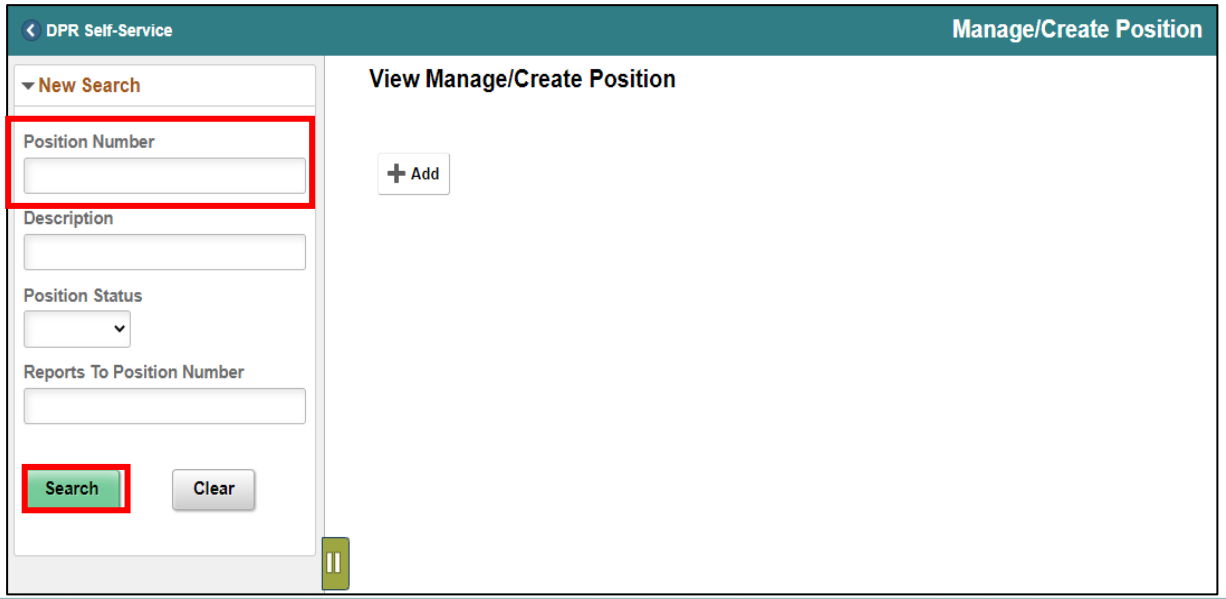
Term	Definition
Historical Row	When a Position effective date lands in between Job effective dates, the position row is not be added. The Job record must be manually updated by the HR Position Administrator.
Top of Stack	When the position effective date is equal to or greater than a Job's effective date,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

Lecture 1: Modify Position

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

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

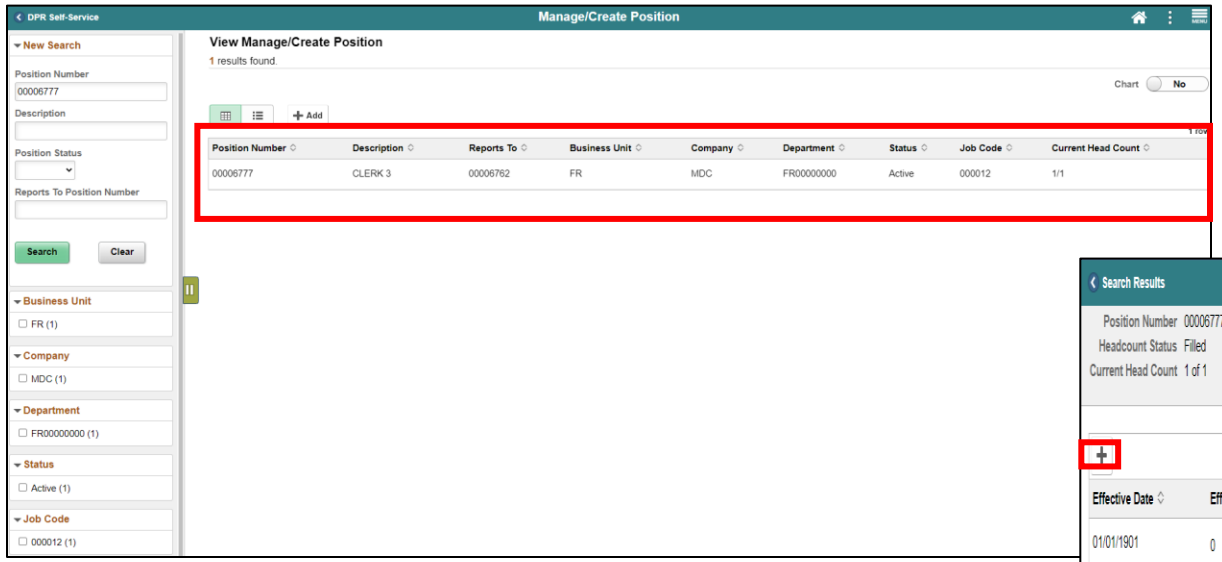
1. In the **Position Number** field, enter **the position** number being modified.
2. Select **Search**.



Lecture 1: Modify Position Continued

The position information is displayed.

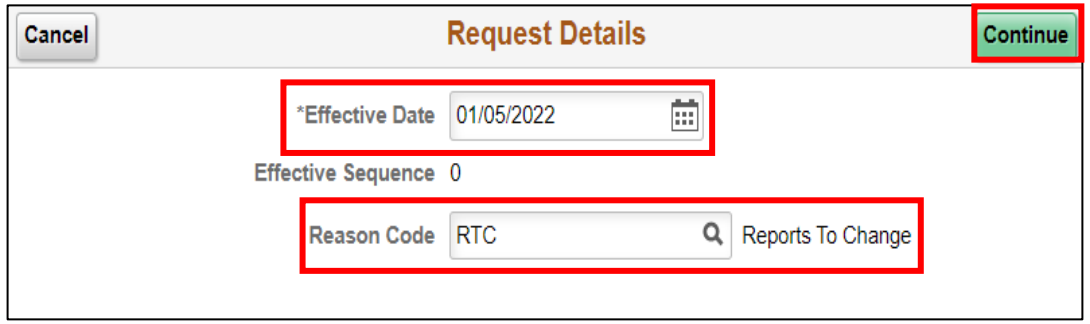
3. Select the **position** being modified.
4. Select the **Plus (+)** button above the **Effective Date** to modify the position with a new **effective date**.



Lecture 1: Modify Position Continued

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

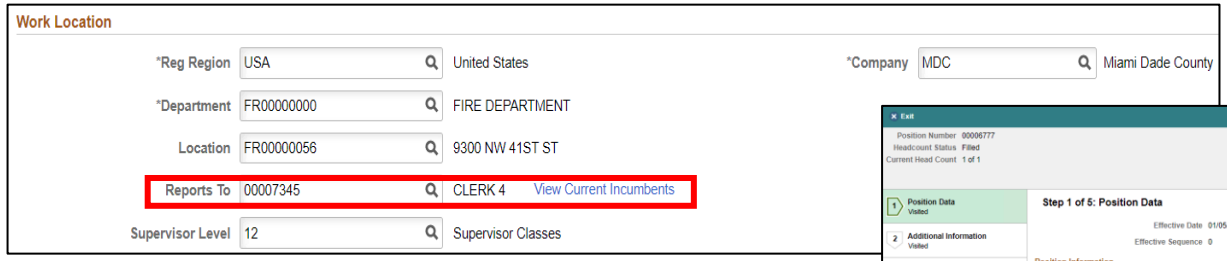
5. In the ***Effective Date**, enter the **new effective date**.
6. In the **Reason Code** field, **select RTC (Reports to Change)** as the reason.
   - Listed are some of the **common Modification Reason Codes** users utilize when making modifications.
7. Select **Continue**
   - The Position Data will display.

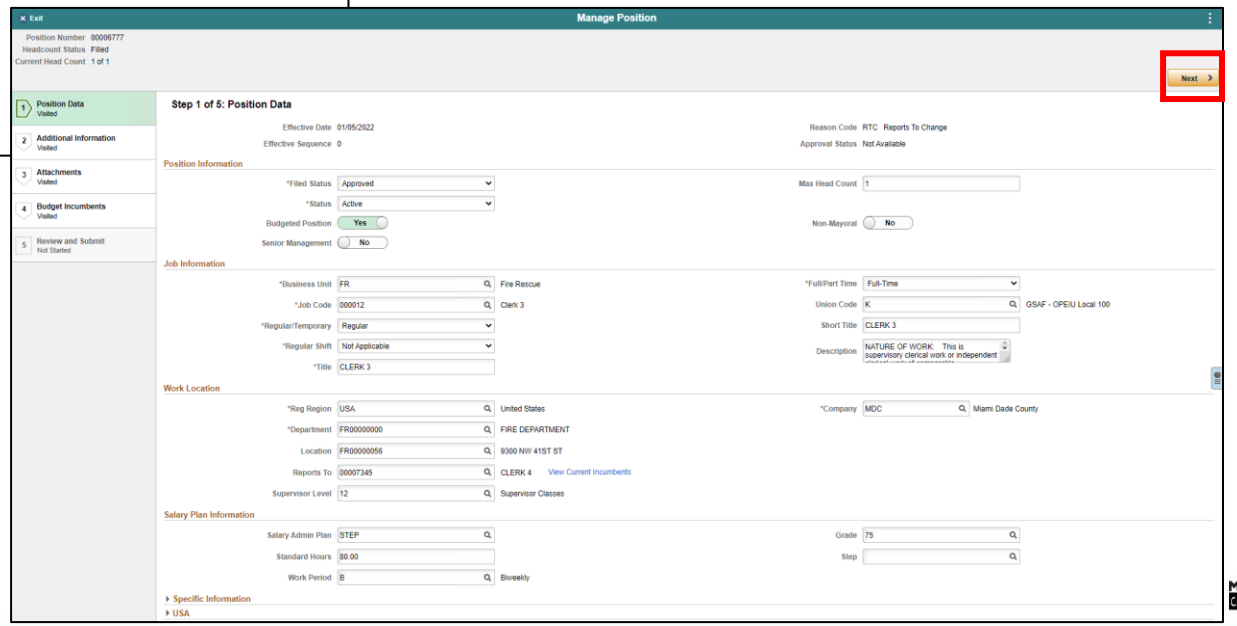


Reason Code	Description
FTE	Change from Temporary to Regular
INA	Position Inactivated (Must have an effective date and **no incumbents in the position**)
RTC	Reports to Change (Must have an effective date and incumbents in the position)
STA	Position Status Change
UPD	Position Data Update

Lecture 1: Modify Position Continued

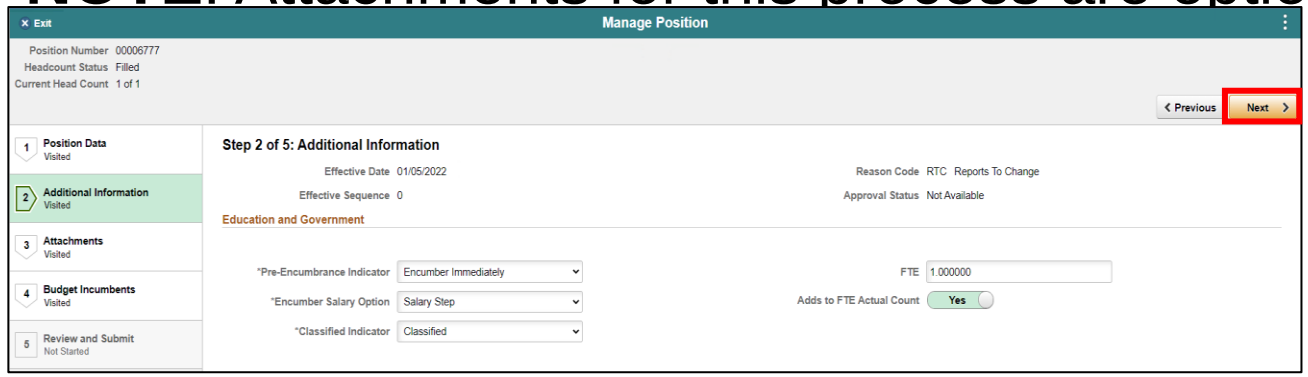
8. In the **Work Location** section, in the **Reports To** field, enter the **position number** of the new immediate supervisor.
9. Review the requested modifications and select **Next**.



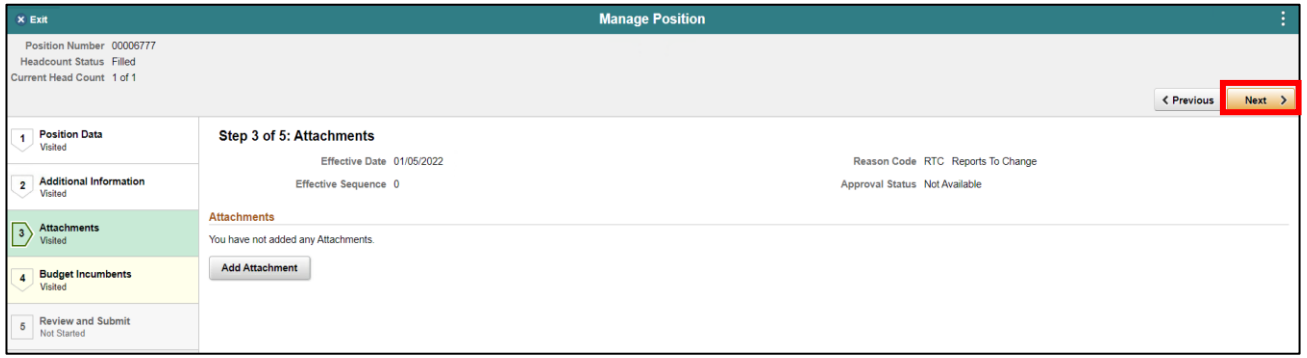


Lecture 1: Modify Position Continued

10. Review the **Additional Information** page and select **Next**.
    - **NOTE**: Attachments for this process are optional.

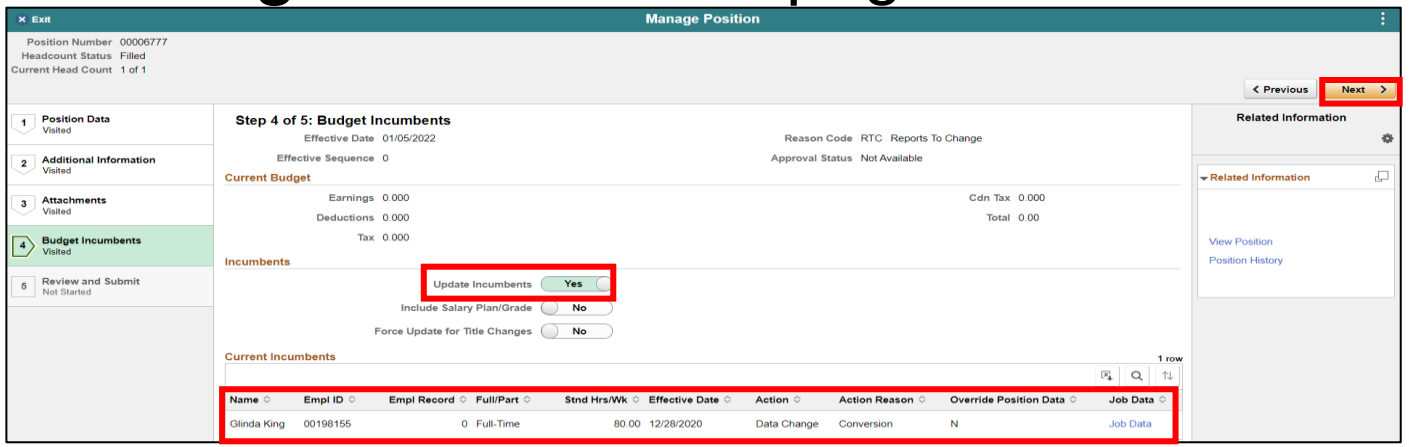


11. Review the **Attachments** page and select **Next**.



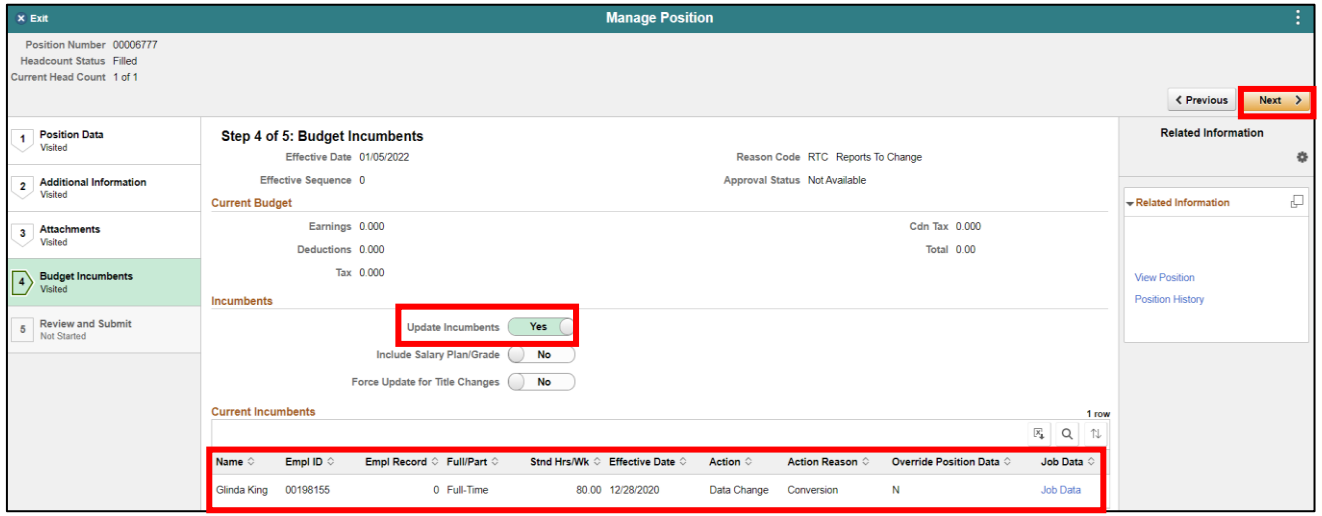
Lecture 1: Modify Position Continued

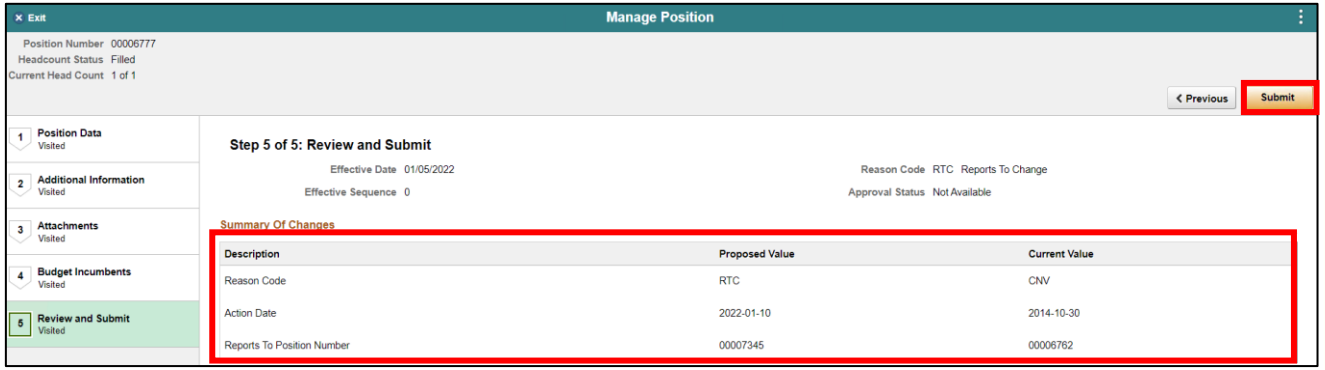
12. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.
    - **NOTE:** When there are no incumbents in the position it is required to have the **Update Incumbents** field set to **No** before submitting the request.
    - Notice in the **Current Incumbents** section, the incumbent in the current position is listed.
13. Review the **Budget Incumbents** page and select **Next.**



Lecture 1: Modify Position Continued

14. In the Summary of Changes section of the Review and Submit page, ensure the requested modifications are listed correctly.
15. Select **Submit** once the requested modifications are ready for processing.

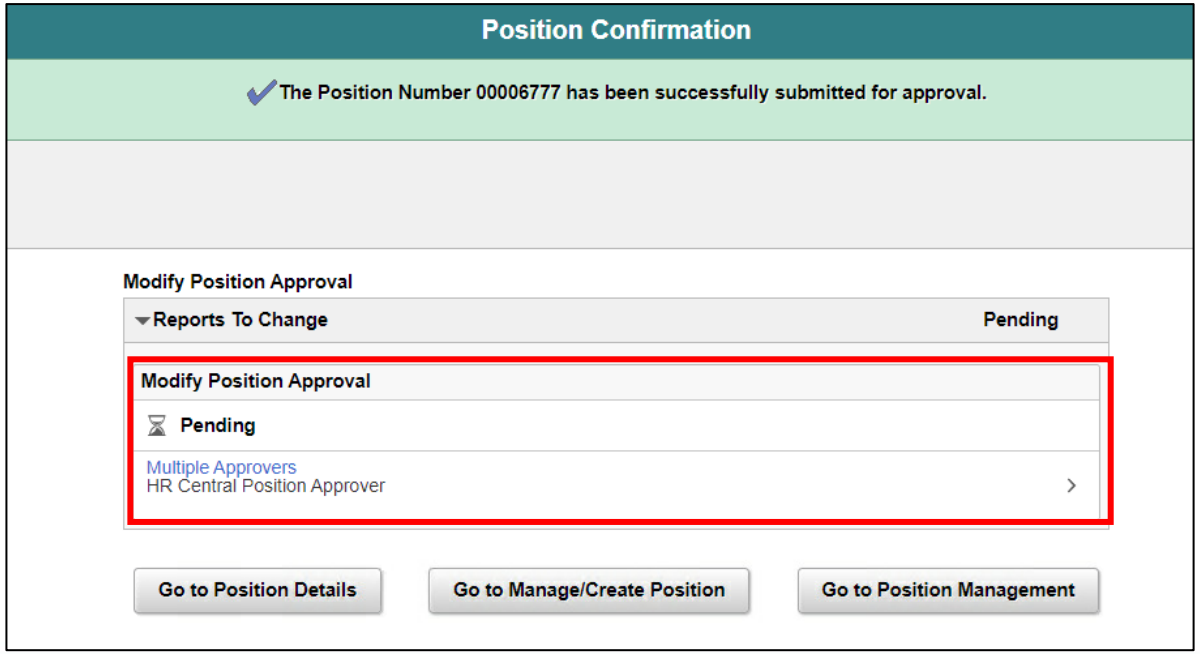




Lecture 1: Modify Position Continued

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 is updated accordingly.

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



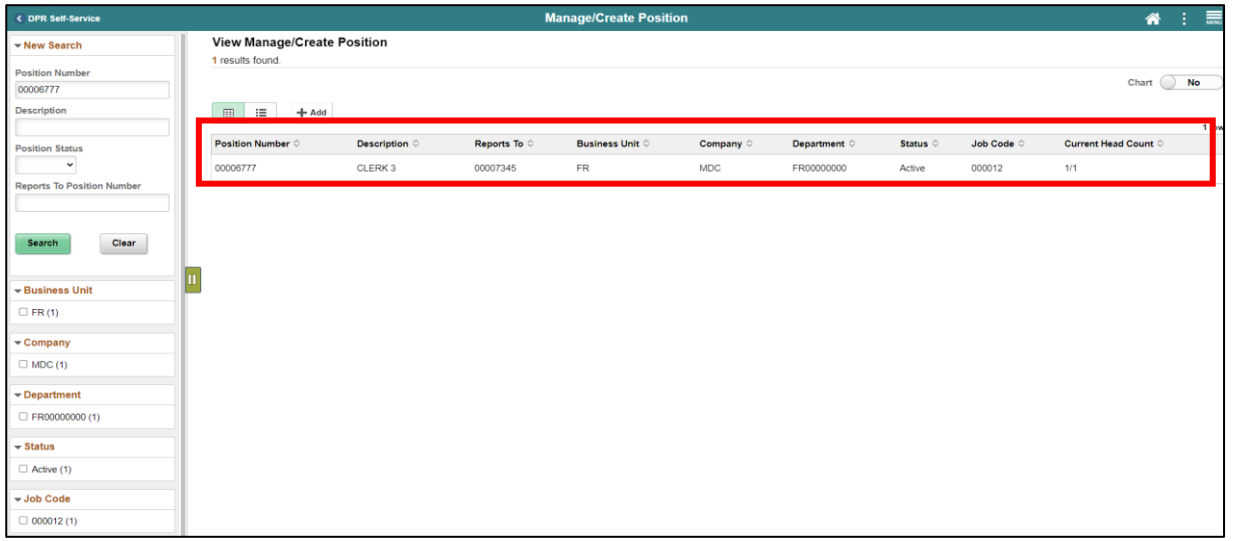
Lecture 2: Validating Modification Request

Navigate to Manage 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**.

Lecture 2: Validating Modification Request Cont'd

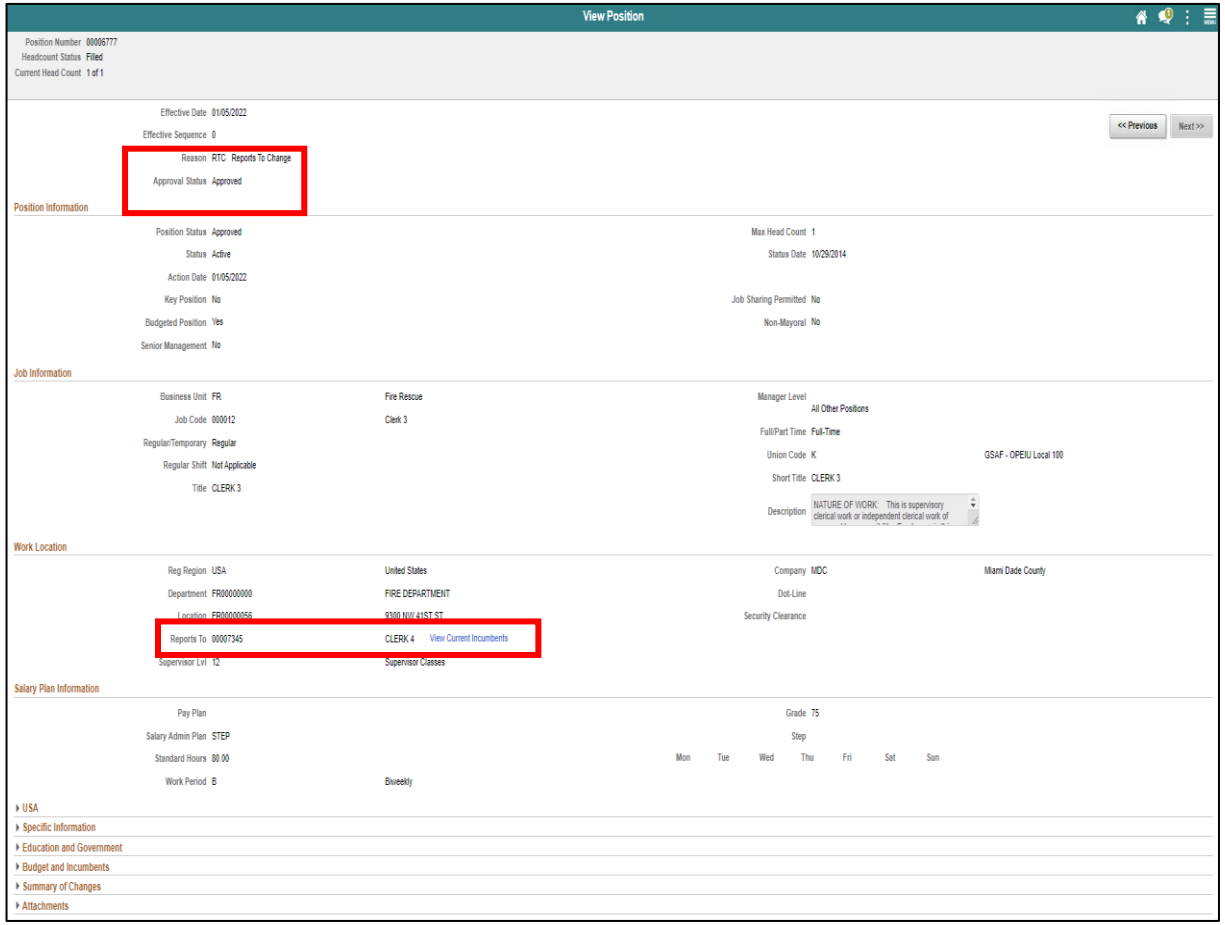
3. Select the **position** being validated
   - The **Position Details** page displays the position activities listed with the Effective Dates, Reason, and Approval Status.
   - Notice the recent request approved.
4. Select the **Expand (>) Icon** to see full details of the position
   - The **View Position** page is displayed with the position details.
   - Notice the **Reason field**, **Approval Status field**, and **Reports To field** updates accordingly.



Lecture 2: Validating Modification Request Cont'd

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

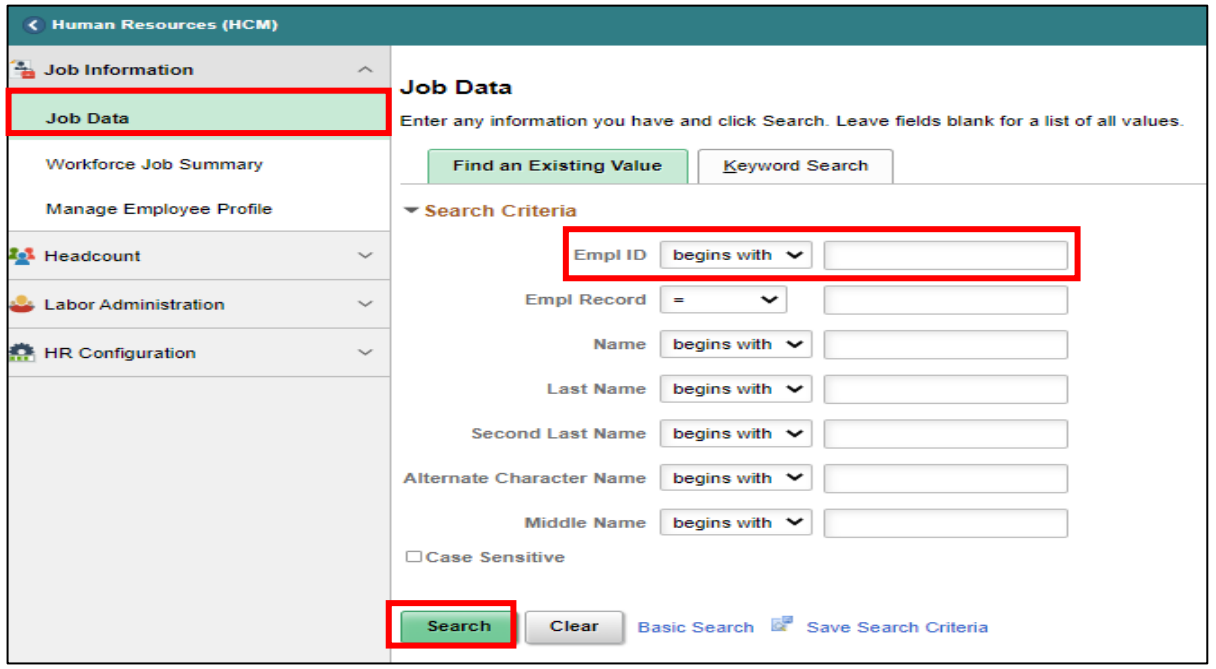
- Notice the **Reason field**, **Approval Status field**, and **Reports To field** updates accordingly.
- Once the Position Data is validated, the next step is to verify the employee's job data record. Users must ensure the employee's job data reflects the updated reporting structure, as it affects processes such as Time & Absence Management and ePerformance Management.



Lecture 2: Validating Modification Request Cont'd

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

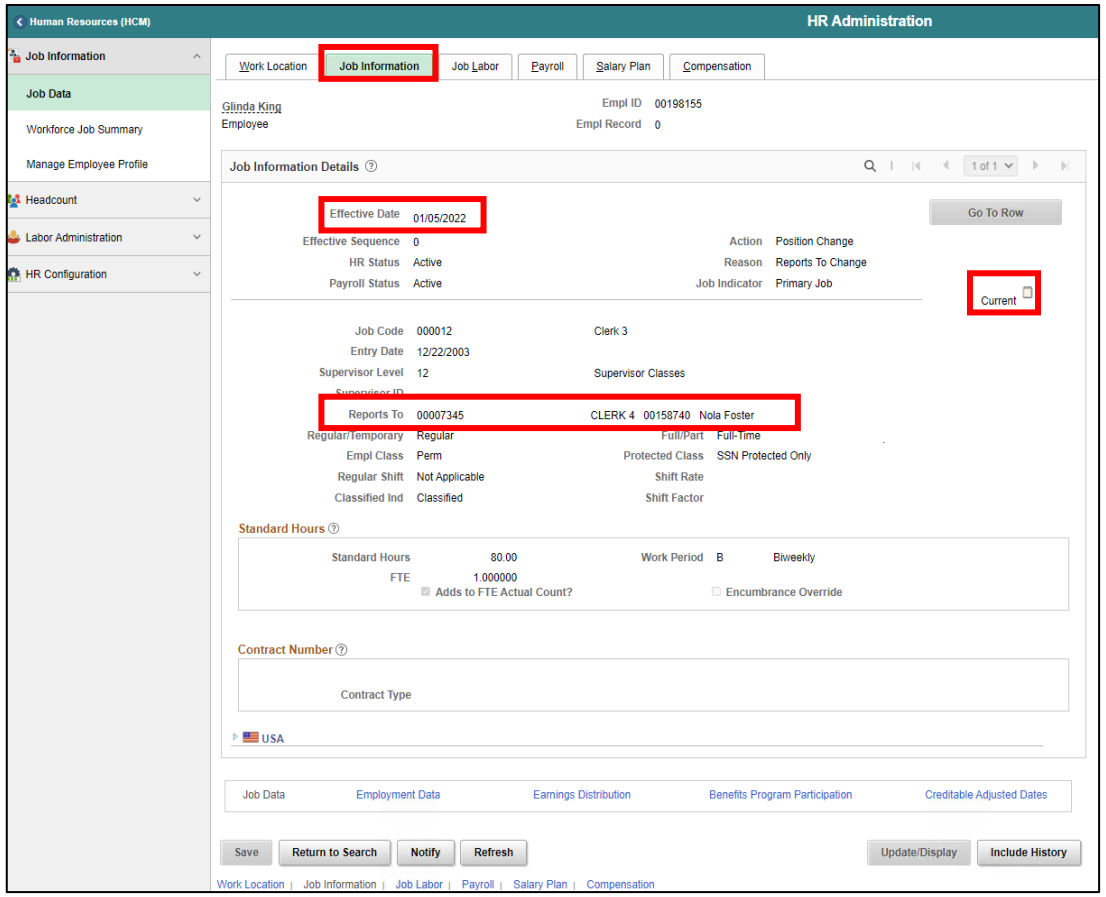
1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number.**
3. Select **Search.**



Lecture 2: Validating Modification Request Cont'd

The Employee's Job Data record is displayed.

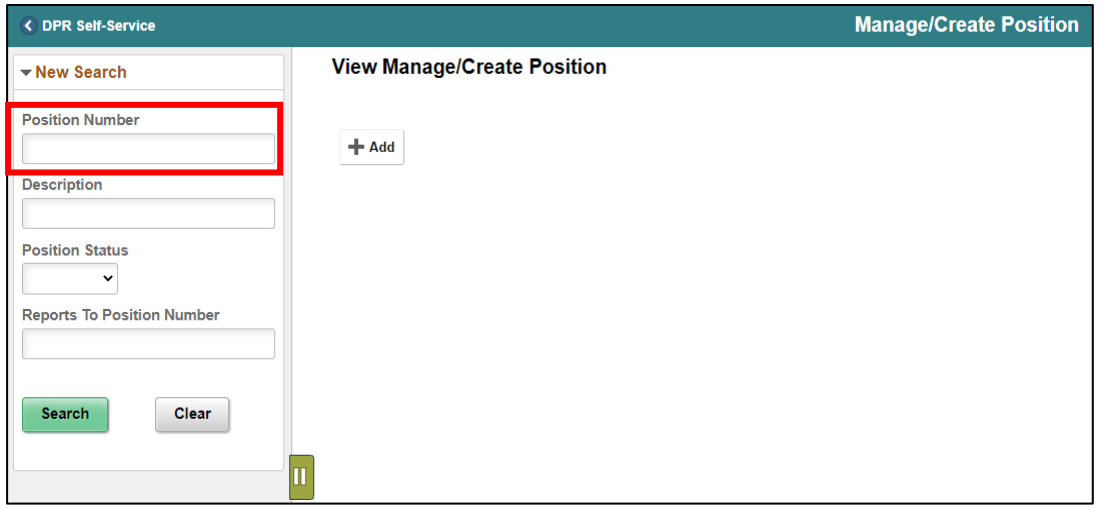
4. Select the **Job Information** tab to see the reporting change.
   - Under **Job Information Details** the **Reports To** section now displays the employee's new immediate supervisor's **Position Number, Employee ID,** and **Name.**
   - This concludes the Validating Modification Request process.
   - **NOTE**: The top of stack record displays the information pertaining to the Employee currently seated in the Position.

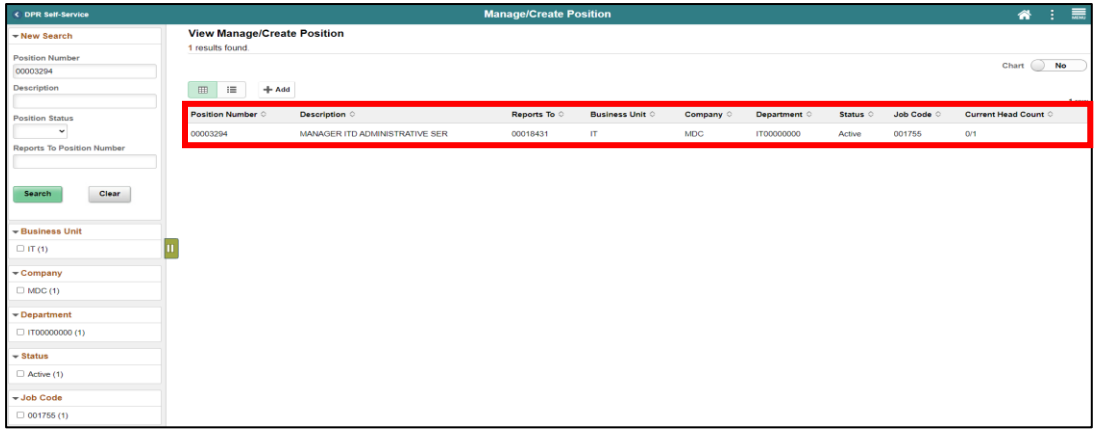


Lecture 3: Inactivate Position

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

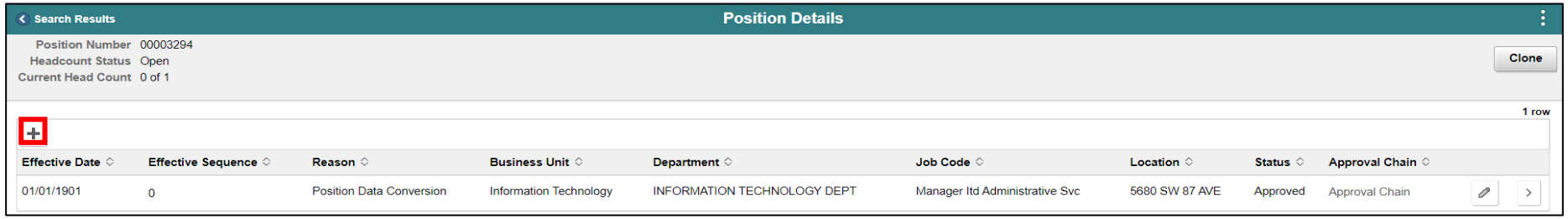
1. In the **Position Number** field, enter **the position number being inactivated**.
2. Select **Search**.
   - **NOTE:** For historical purposes, no fields in this process are to be modified except the **Update Incumbents** toggle in **Budgeted Incumbents**, which is Step 4 of the process.
3. Select the **position being inactivated.**
   - **NOTE:** Ensure the **Current Head Count** is zero when deactivating a position.



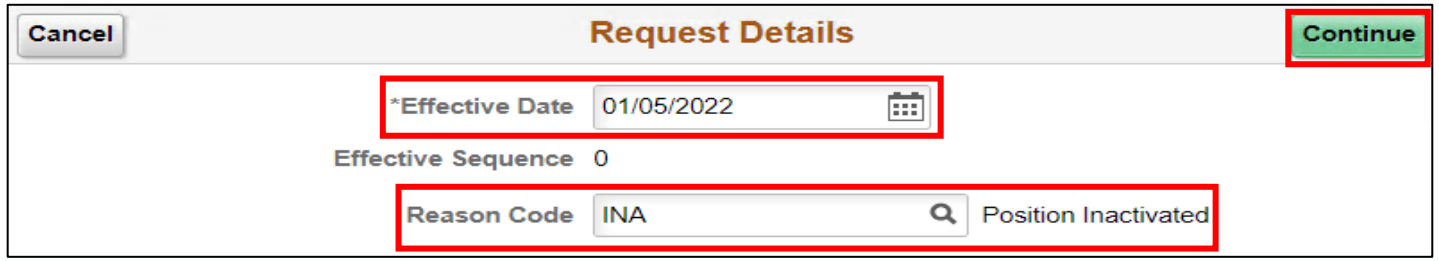


Lecture 3: Inactivate Position Continued

4. Select the **Plus (+)** icon above the **Effective Date** to modify the position with a new effective date.
   - The **Request Details** pop-up is displayed to enter the new effective date and select the modification reason.



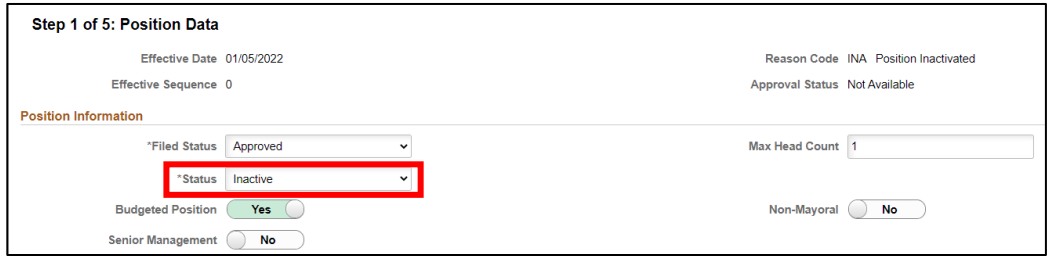
5. In the ***Effective Date** field, enter the **new effective date**.
6. In the **Reason Code** field, select **INA (Position Inactivated)** as the reason.
7. Select **Continue**.

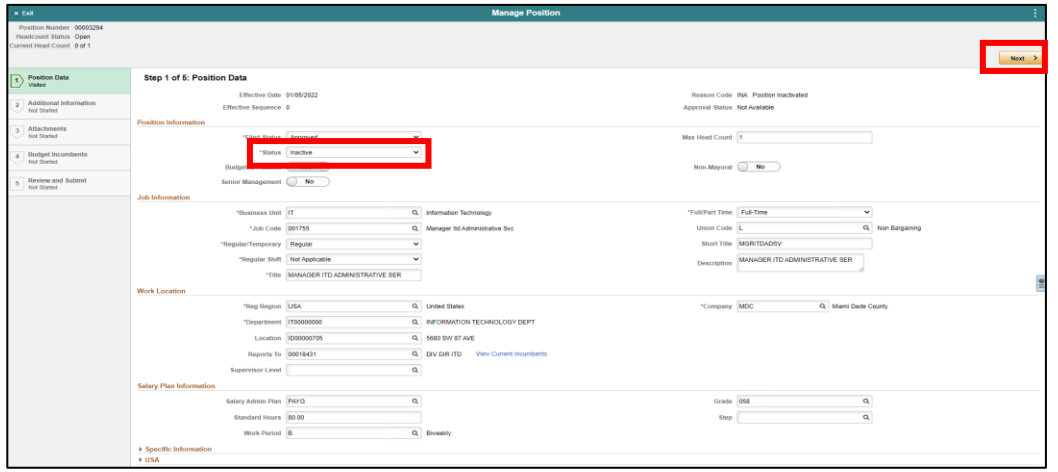


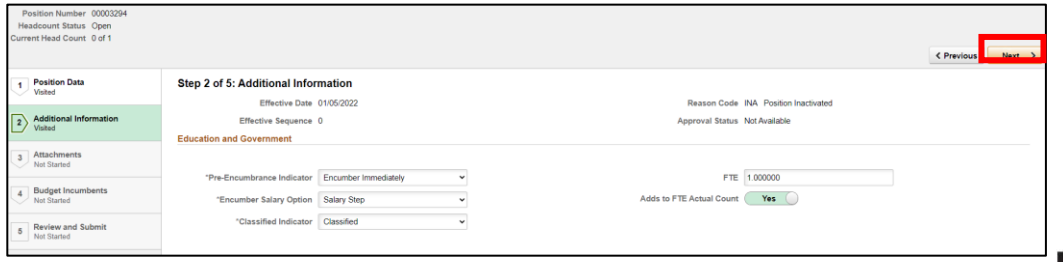
Lecture 3: Inactivate Position Continued

The **Position Data** page 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**.
9. Review the requested modifications and select **Next.**
10. Review **Additional Information** page and select **Next**.





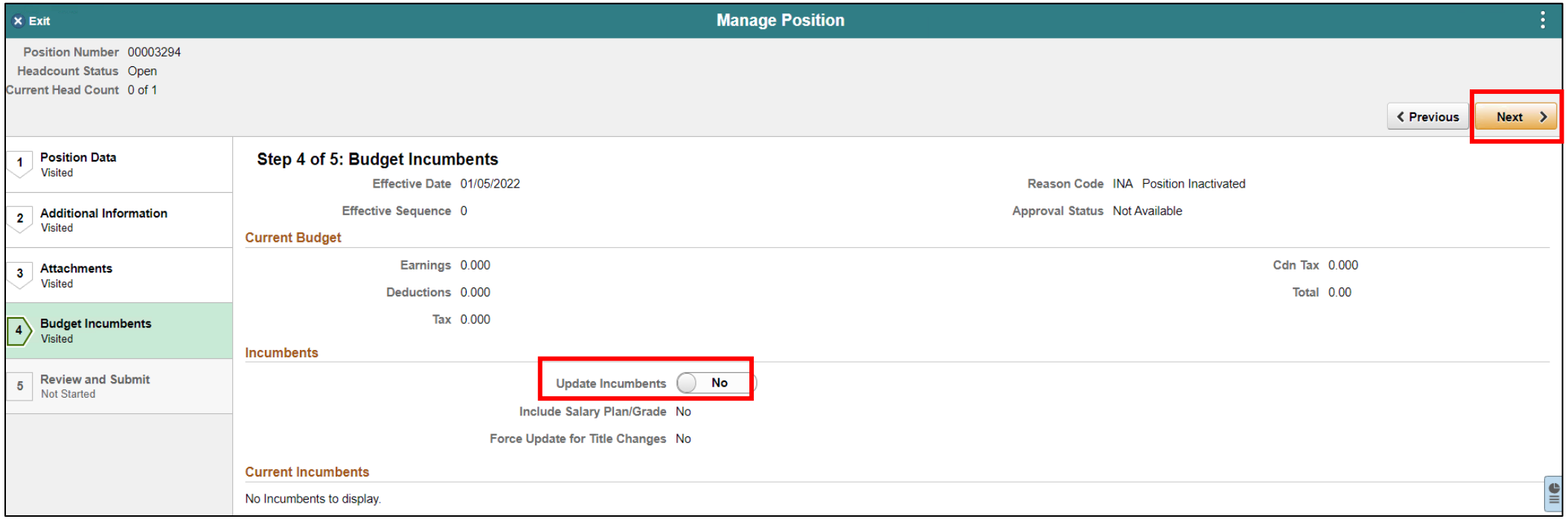


Lecture 3: Inactivate Position Continued

11. On the **Attachments** page attach any supporting documentation regarding the request
    - **NOTE**: Attachments for this process are required
12. Select **Attachment**
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 the supporting documentation
18. Select **Next**

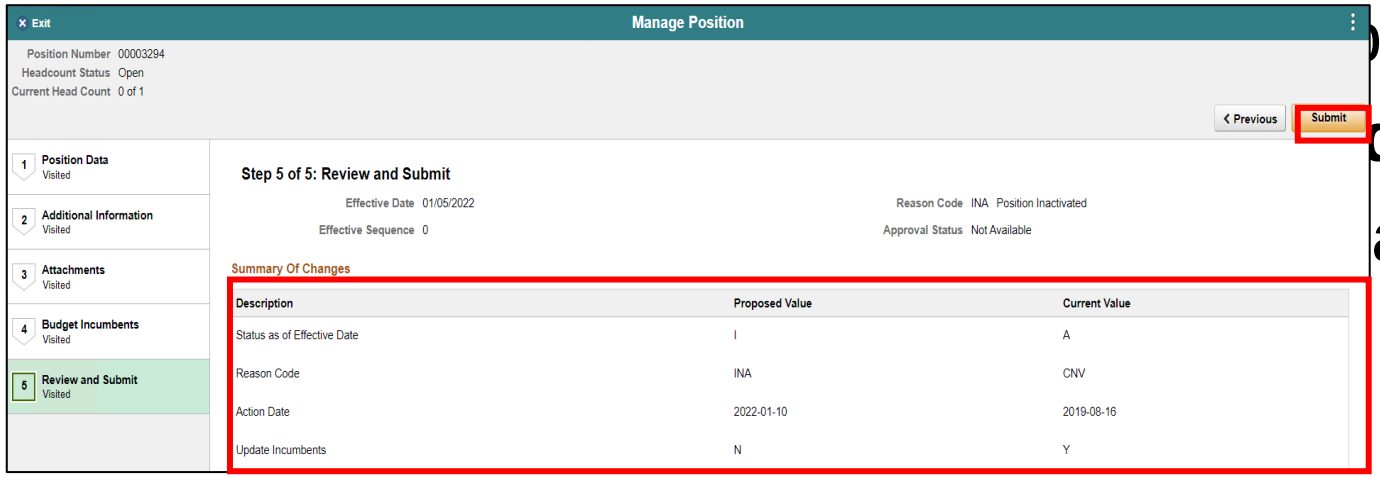
Lecture 3: Inactivate Position Continued

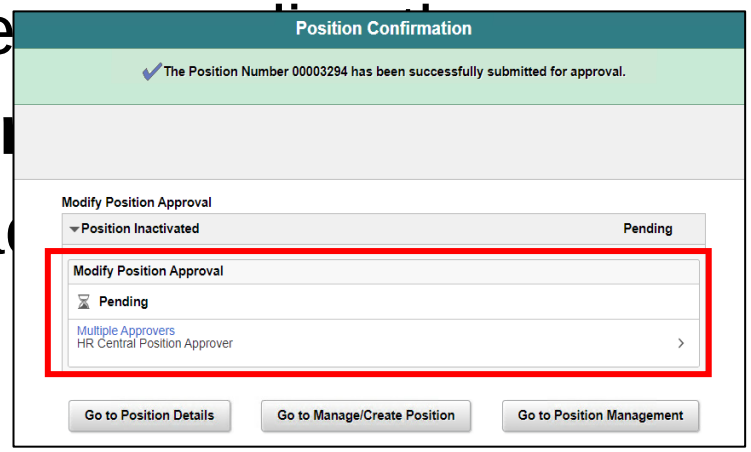
19. In the **Budget Incumbents** page in **Update Incumbents** field select **No**
20. Select **Next**



Lecture 3: Inactivate Position Continued

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





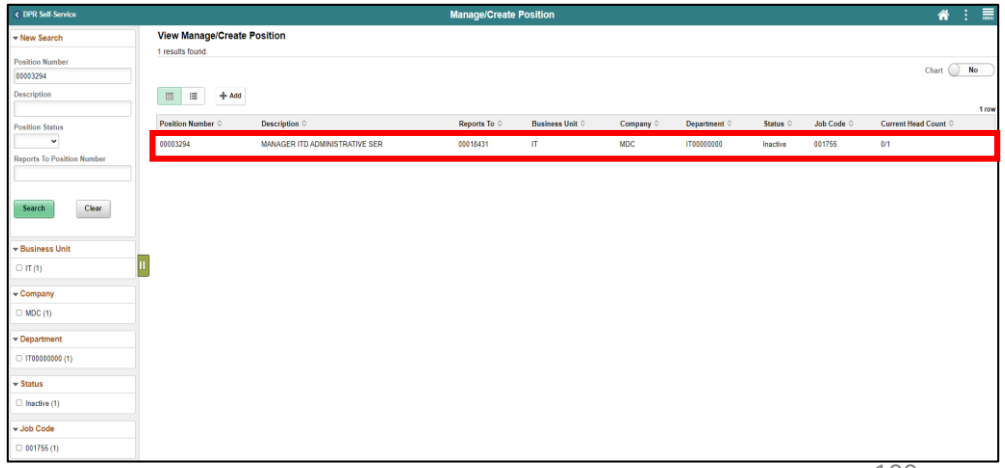
Lecture 4: Validating Inactive Position

Validating the modification request affects the Position.

Navigate to Manage Position:

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

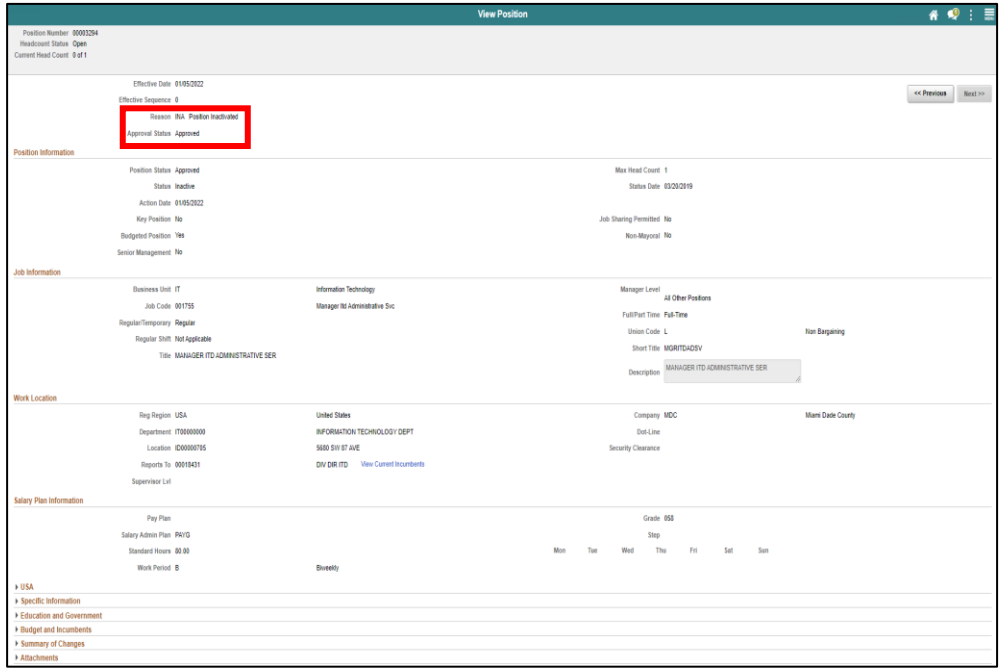
1. In the **Position Number** field, enter the **position number** being inactivated.
2. Select **Search**.
   - The position information is displayed.
3. Select the **position** being validated.



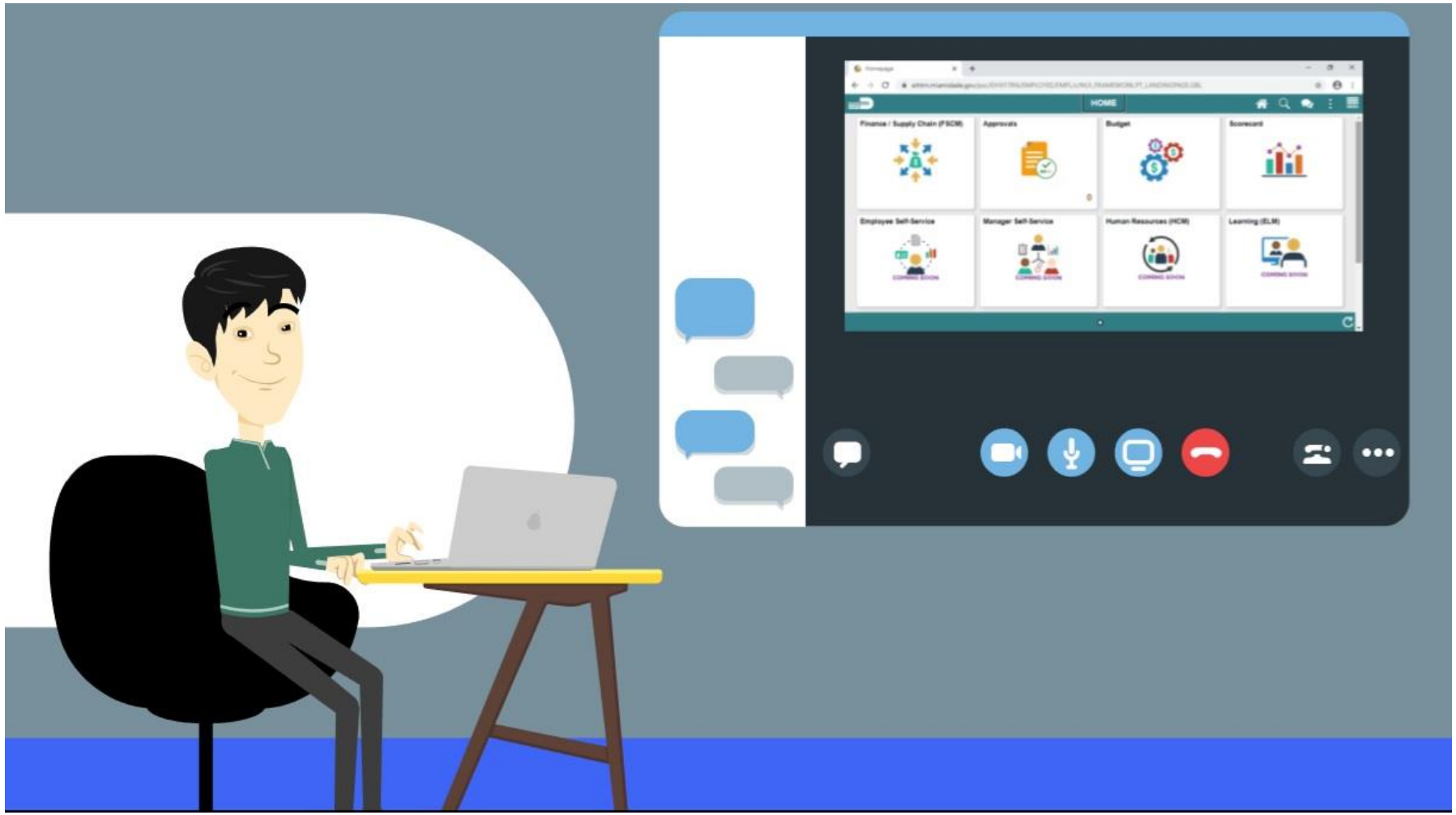
Lecture 4: Validating Inactive Position Cont'd

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.
   - The **View Position** page is displayed with the position details.
   - Notice the **Reason** field and the **Approval Status** field updates accordingly.
   - The position is successfully **Inactivated**, concluding the Validating Inactive Position process.



Lesson 3: Activities and Exercises



Lesson 3: Lesson Summary

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

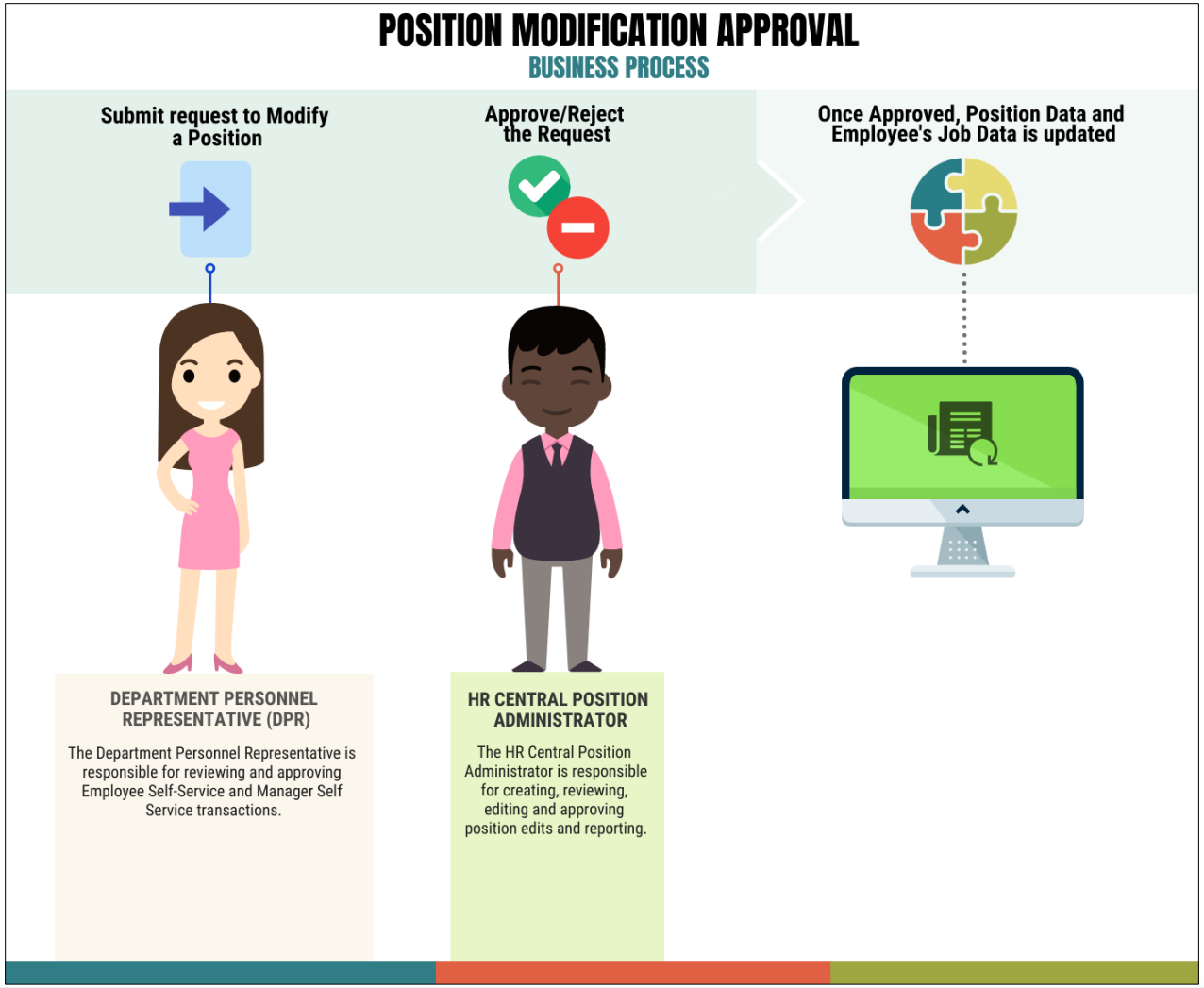
- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

Lesson 4: Submit Job Data Changes that Impact Benefits

At the conclusion of this lesson, participants 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 Cont'd



Lecture 1: 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.

Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

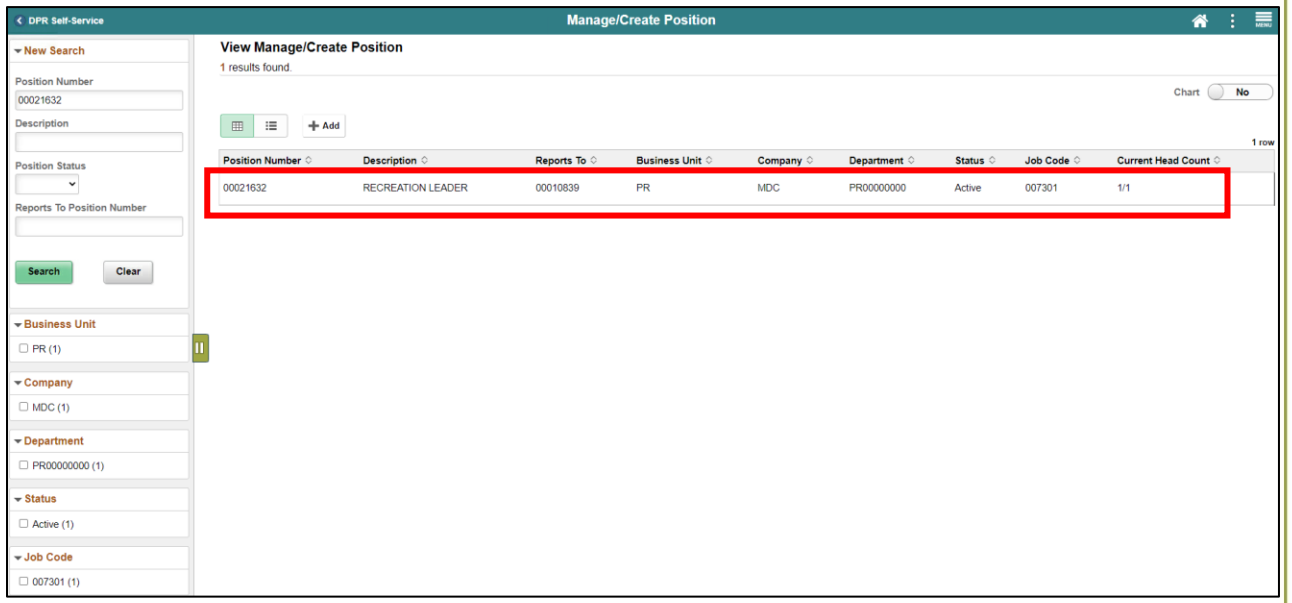
Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

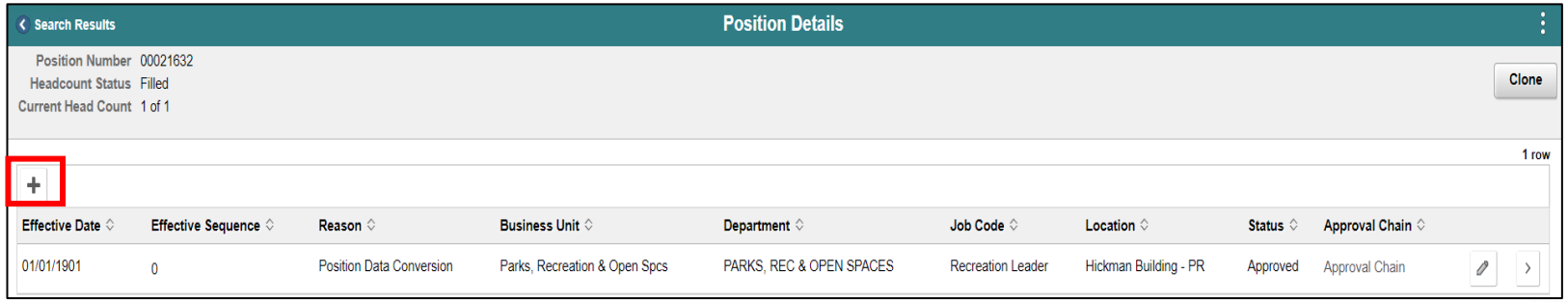
1. In the **Position Number** field, enter **the part-time/temporary position number being modified**.
2. Select **Search**.

Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

The position information is displayed.

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





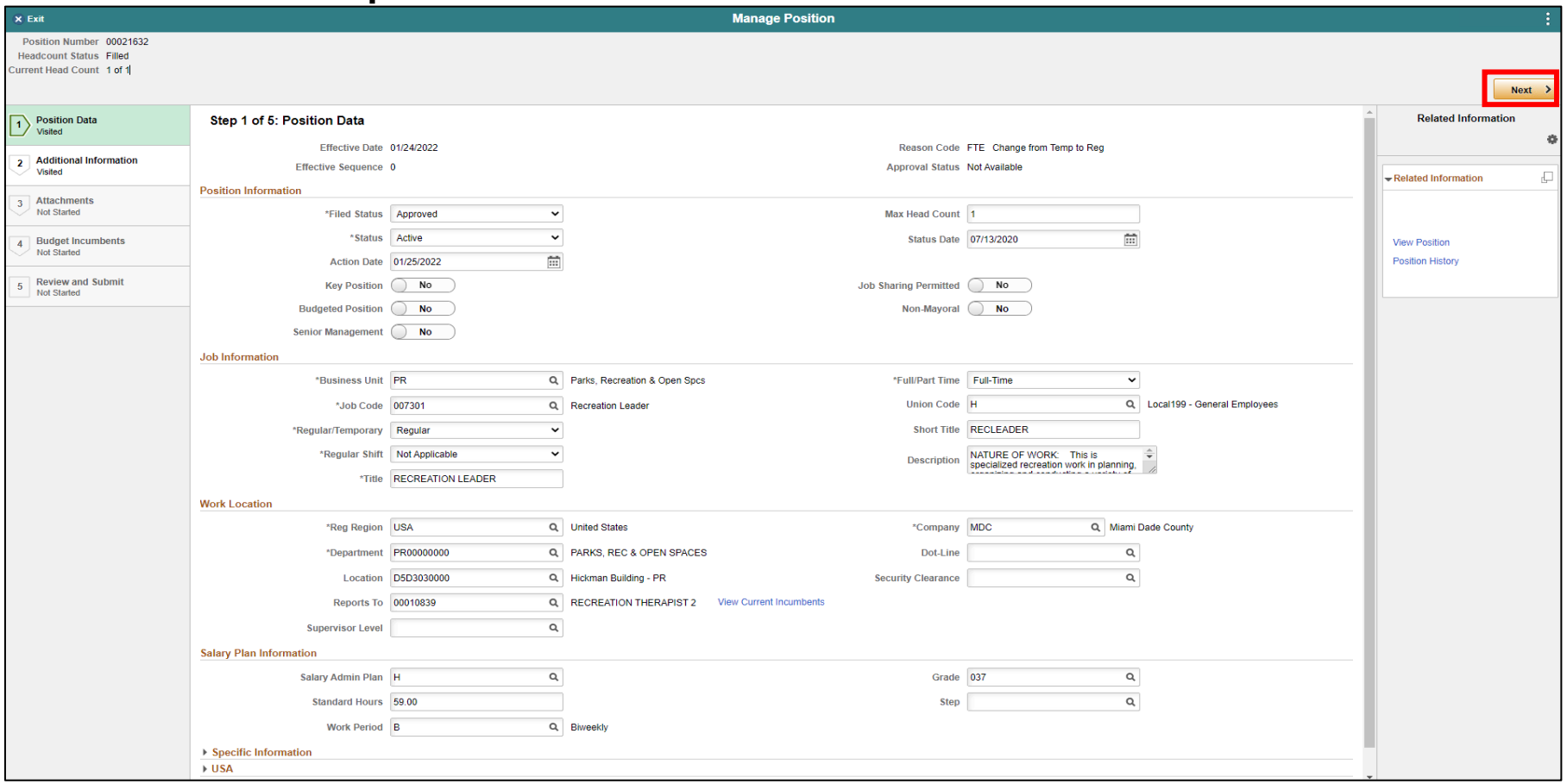
Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

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 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**.

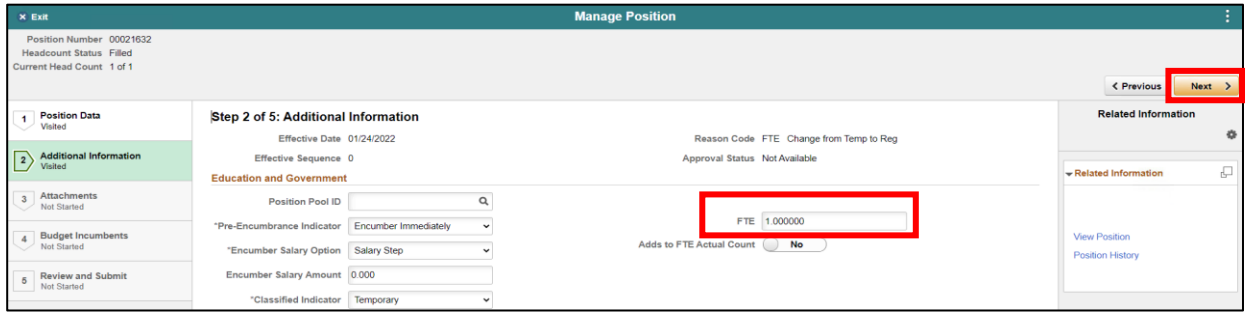
Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

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



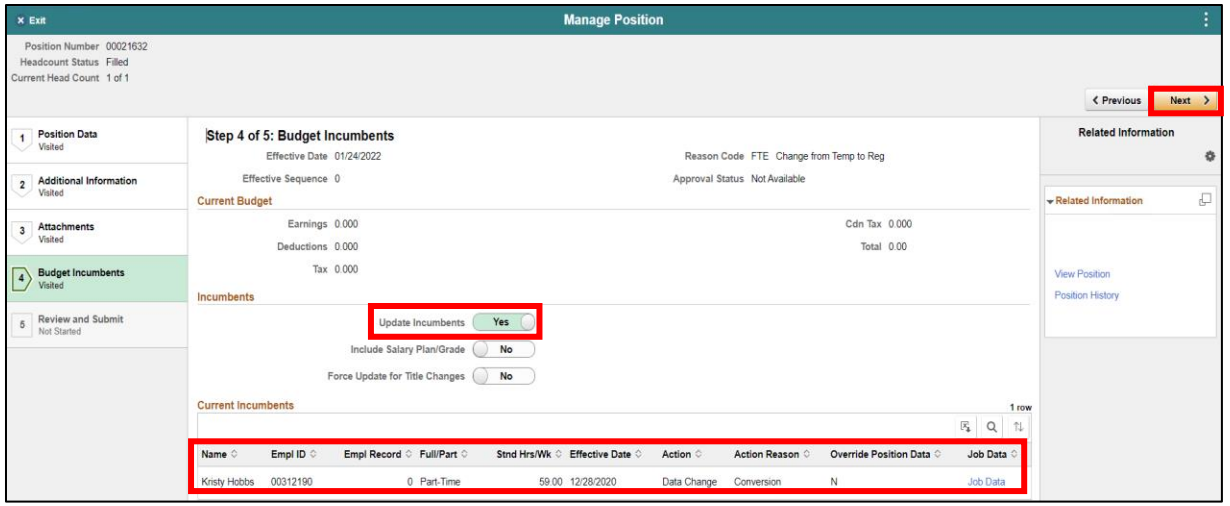
Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

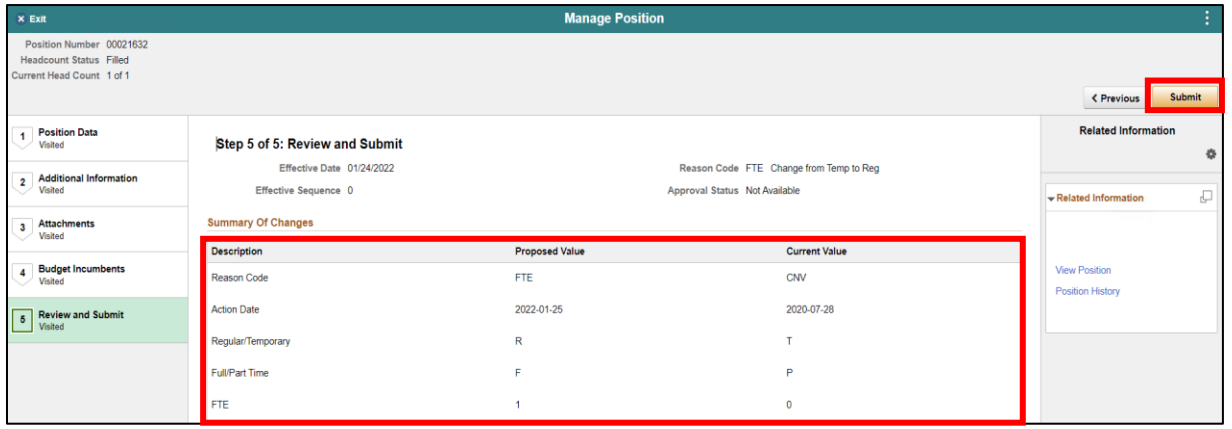
11. In the **Additional Information** page, in the **FTE** field, enter **1.00**
    - **NOTE:** When changing a Part-Time position to Full-time it is necessary to adjust the FTE to 1
12. Select **Next**
    - Attachments for this process are optional
13. Review the **Attachments** page and select Next



Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

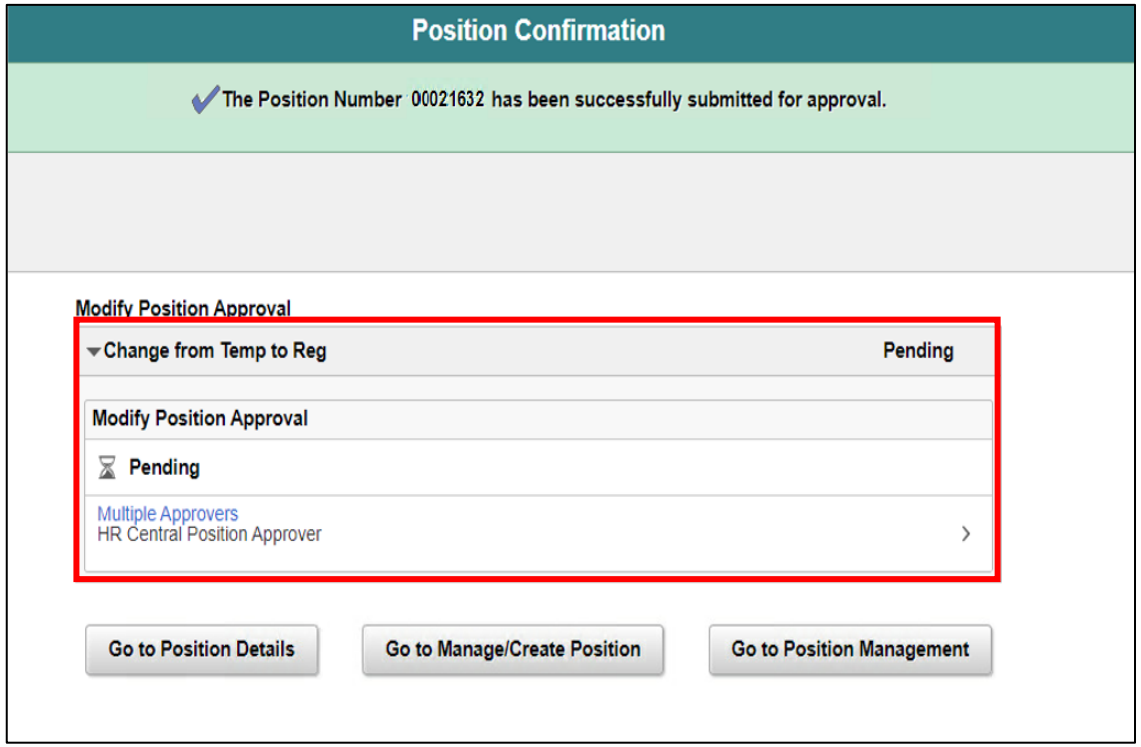
14. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents
    - **NOTE:** When there are no incumbents in the position it is required to have the **Update Incumbents** field set to **No** before submitting the request.
    - Notice in the **Current Incumbents** section, the incumbent in the current position is listed as well as their current information.
15. Review **Budget Incumbents** Sand select **Next**
16. In the **Summary of Changes** section of the **Review and Submit** page, ensure the requested modifications are listed correctly
17. Select **Submit** once the requested modifications are ready for processing





Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

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.

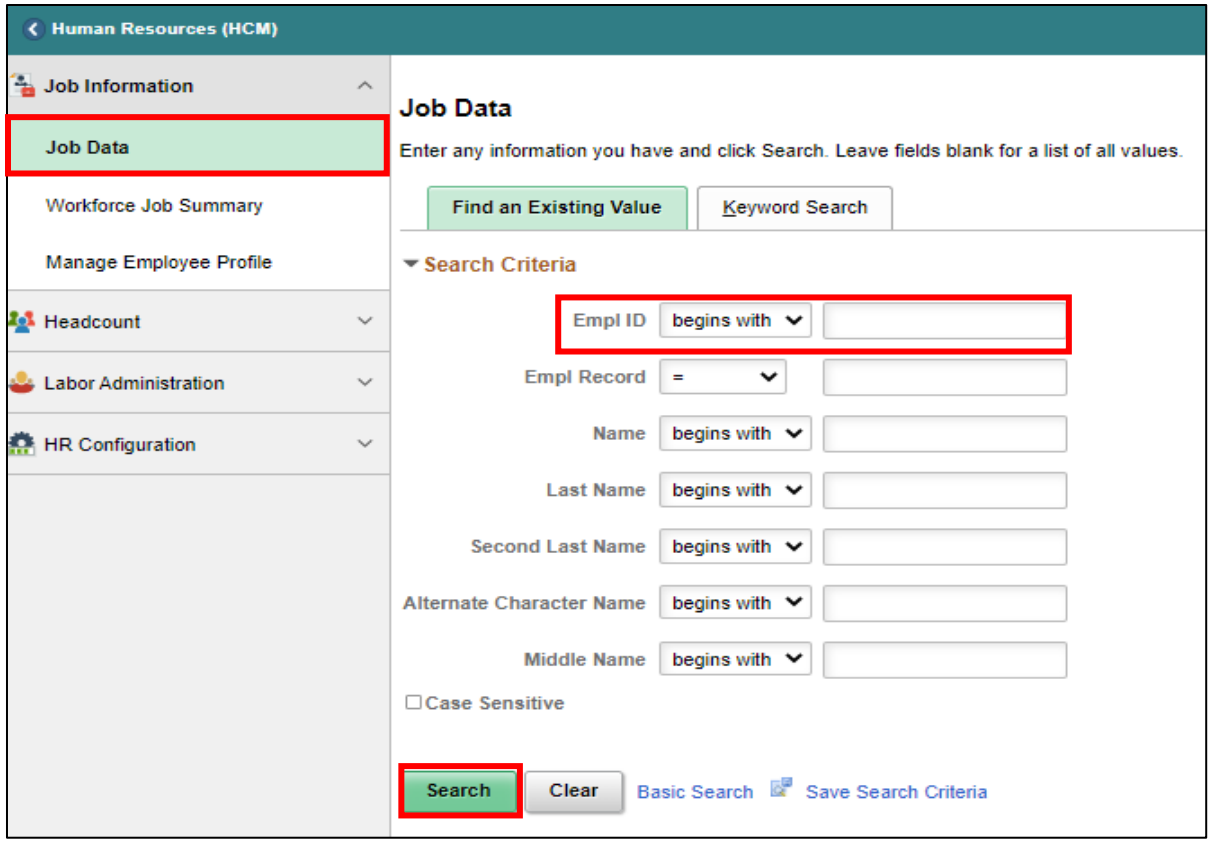


Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

Once the position modification has been approved and validated, the next step is to validate the employee's job data record.

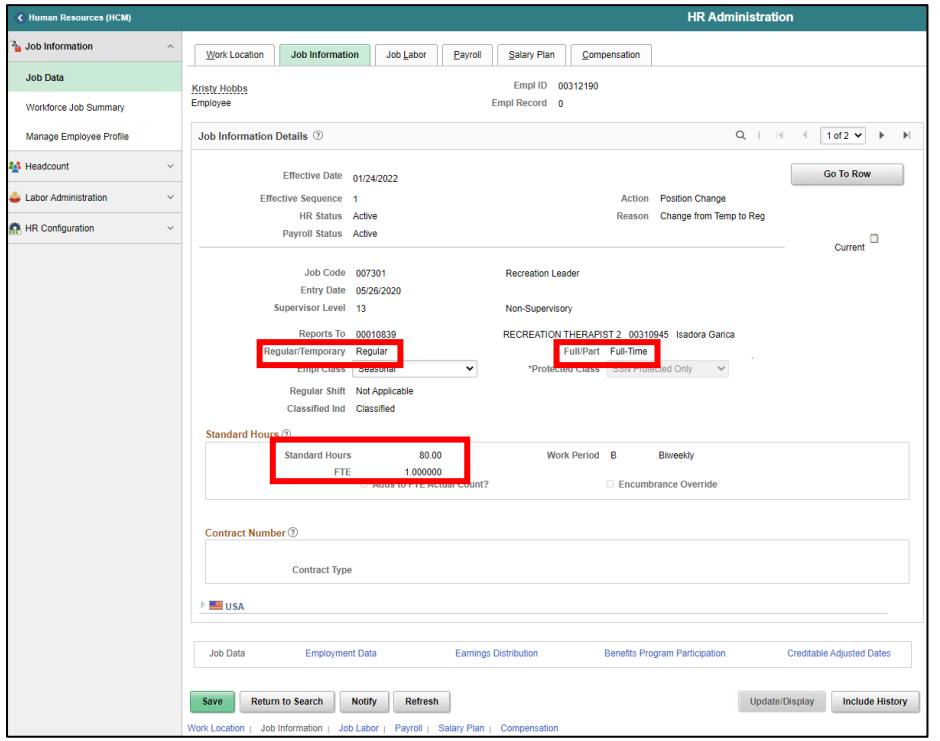
Navigate to Job Data: **HCM > HR Administration > Job Information > Job Data**

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**
   - The Employee's Job Data record then displays.



Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

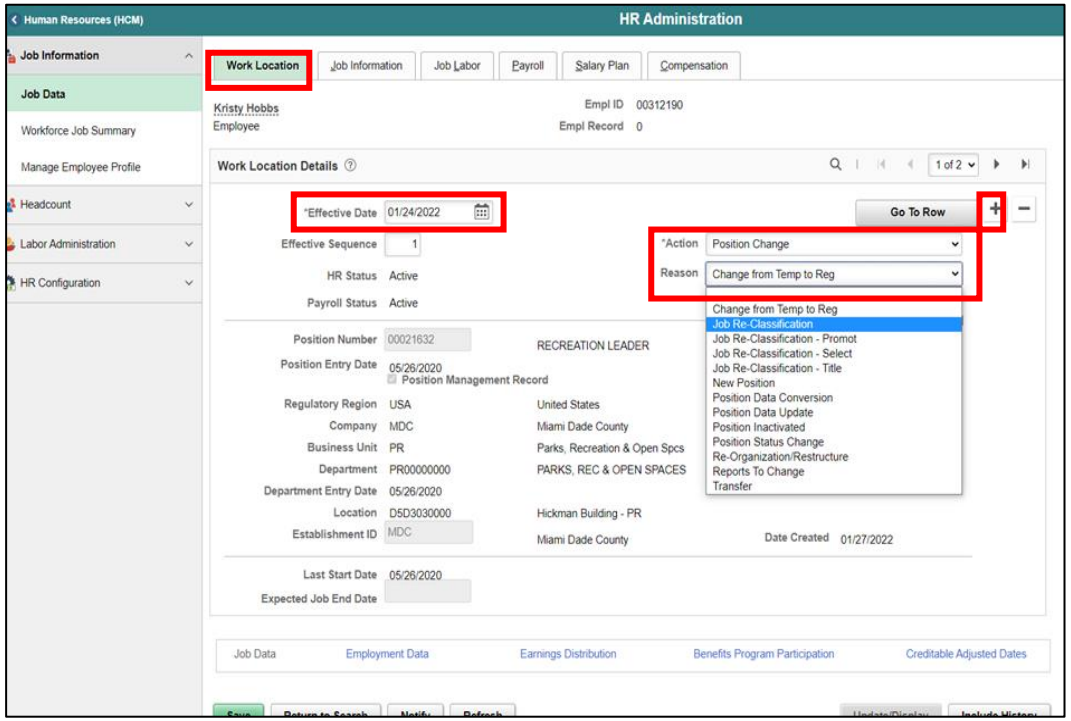
4. Select the **Job Information** tab to see the reporting change
   - Notice under **Job Information Details** the **Regular/Temporary** section now displays the employee's **new Regular status, Full-Time, Standard Hours, and new FTE. The employee is now eligible to receive benefits.**



Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

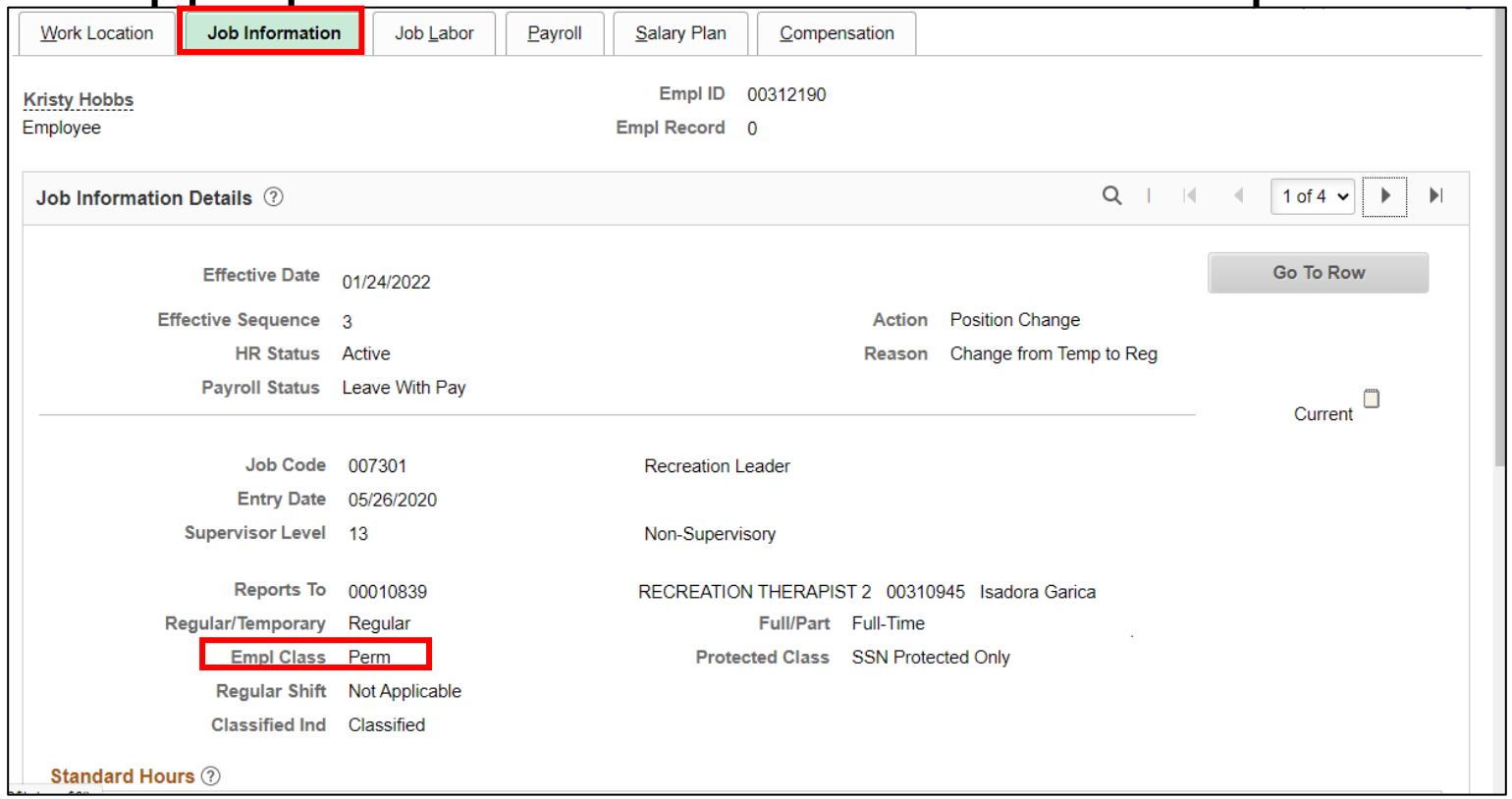
To change the **EMPL class**, a new row must be added.

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**.



Lecture 1: Submit Job Data Changes that Impact Benefits Cont'd

9. Navigate back to the **Job Information** tab.
10. Select the appropriate **EMPL Class** from the dropdown menu.



Lesson 4: Activities and Exercises

Lesson 4: Lesson Summary

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

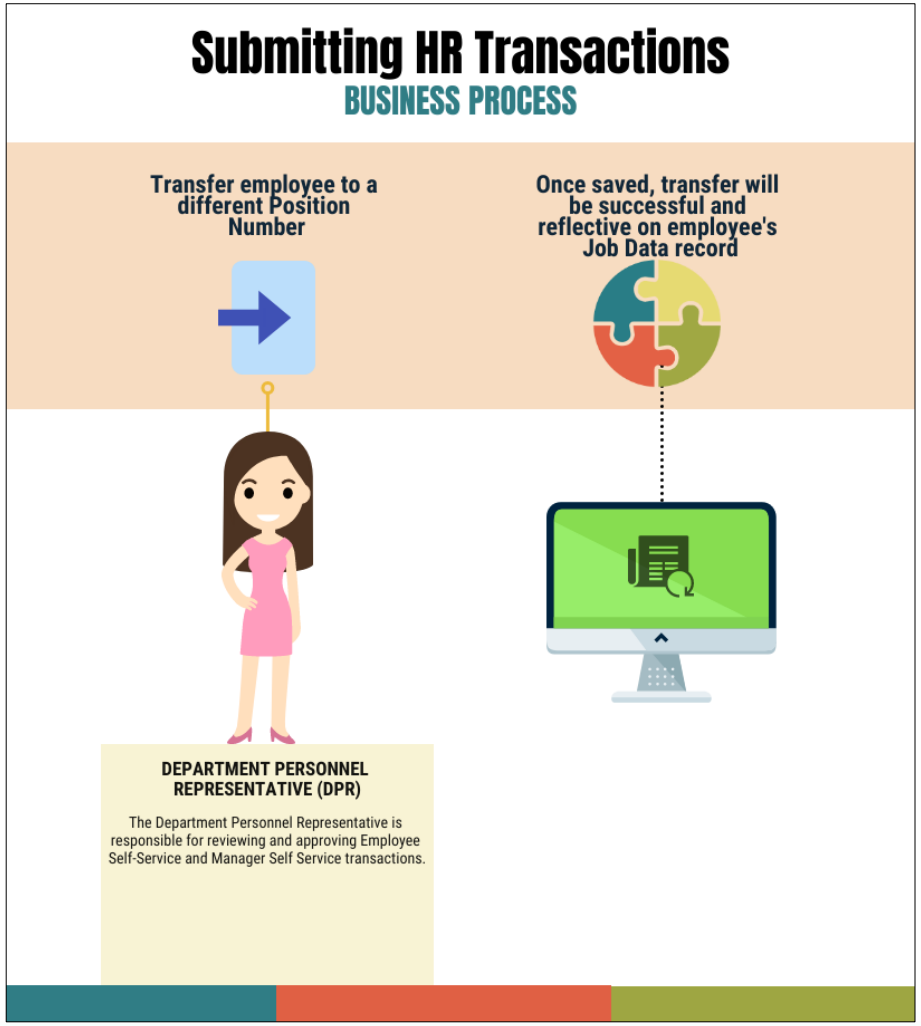
- Update a temporary employee to regular status for them to obtain benefits

Lesson 5: Submitting HR Transactions

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

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

Lesson 5: Submitting HR Transactions



Lecture 1: Transfer Employee to a Position (Lateral)

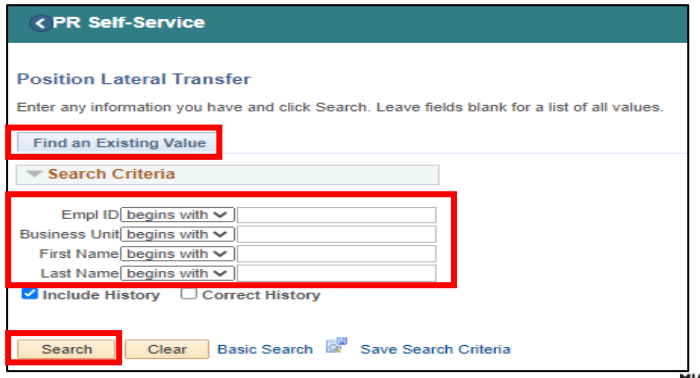
Transfer Employee to a different Position Number (Lateral) allows a user to transfer an employee within the same Department and Job Code to a different Position within the Business Unit (exclusively).

- **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**

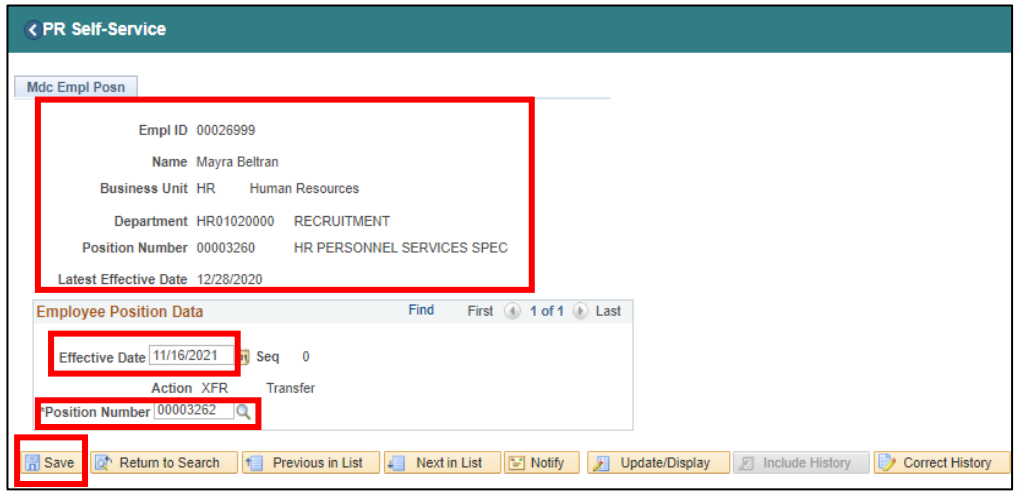
On the **Position Lateral Transfer page** under Find an **Existing Value**:

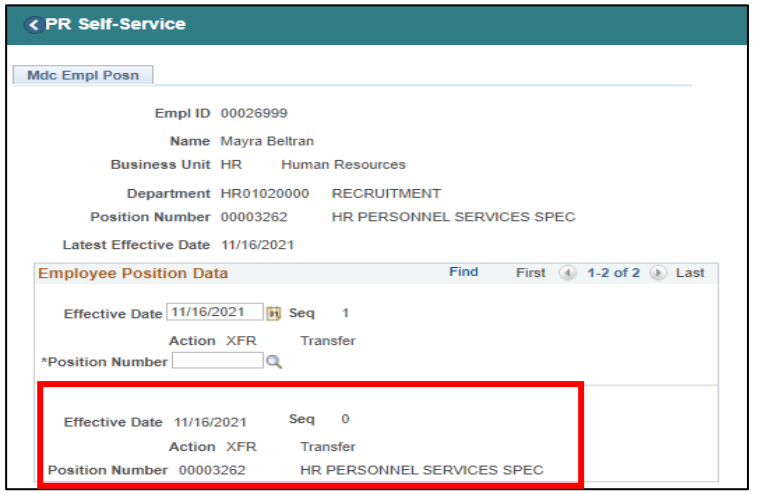
1. In the **Empl ID field**, enter the **Employee's 8-digit Numeric Identification Number.**
2. In the **Business Unit** field, enter the **Business Unit**.
3. In the **First Name** field, enter the **employee's first name**.
4. In the **Last Name** field, enter the **employee's last name**.
5. Select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



Lecture 1: Transfer Employee to a Position (Lateral) Cont'd

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
8. Select **Save**
   - Notice the employee transferred from **Position #00003260 to Position #00003262.**

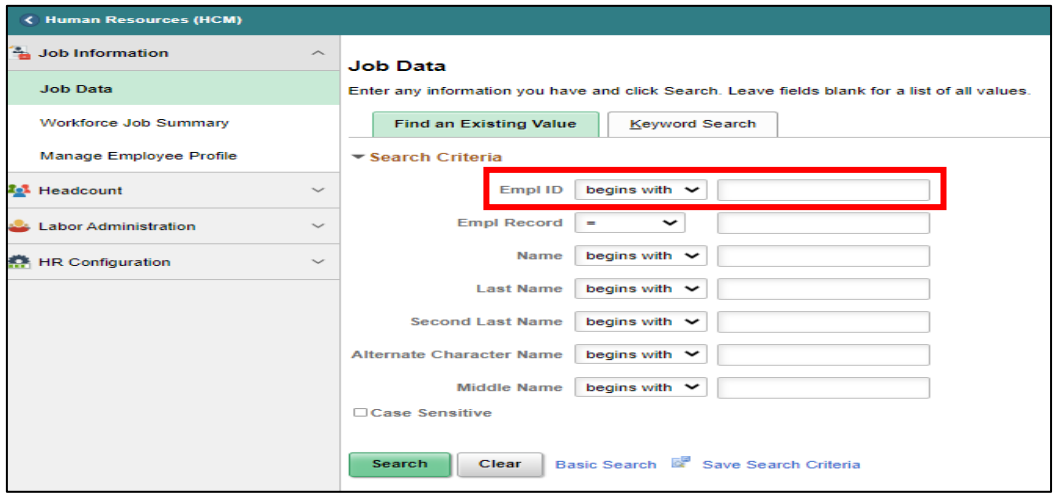


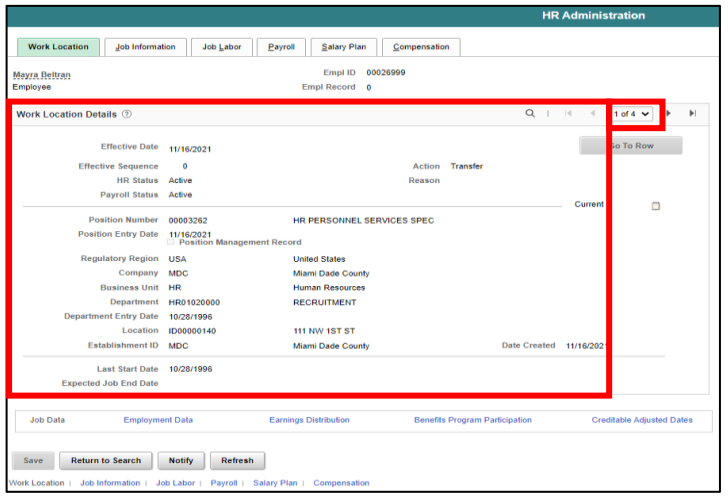


Lecture 2: Verify Employee Transfer (Lateral)

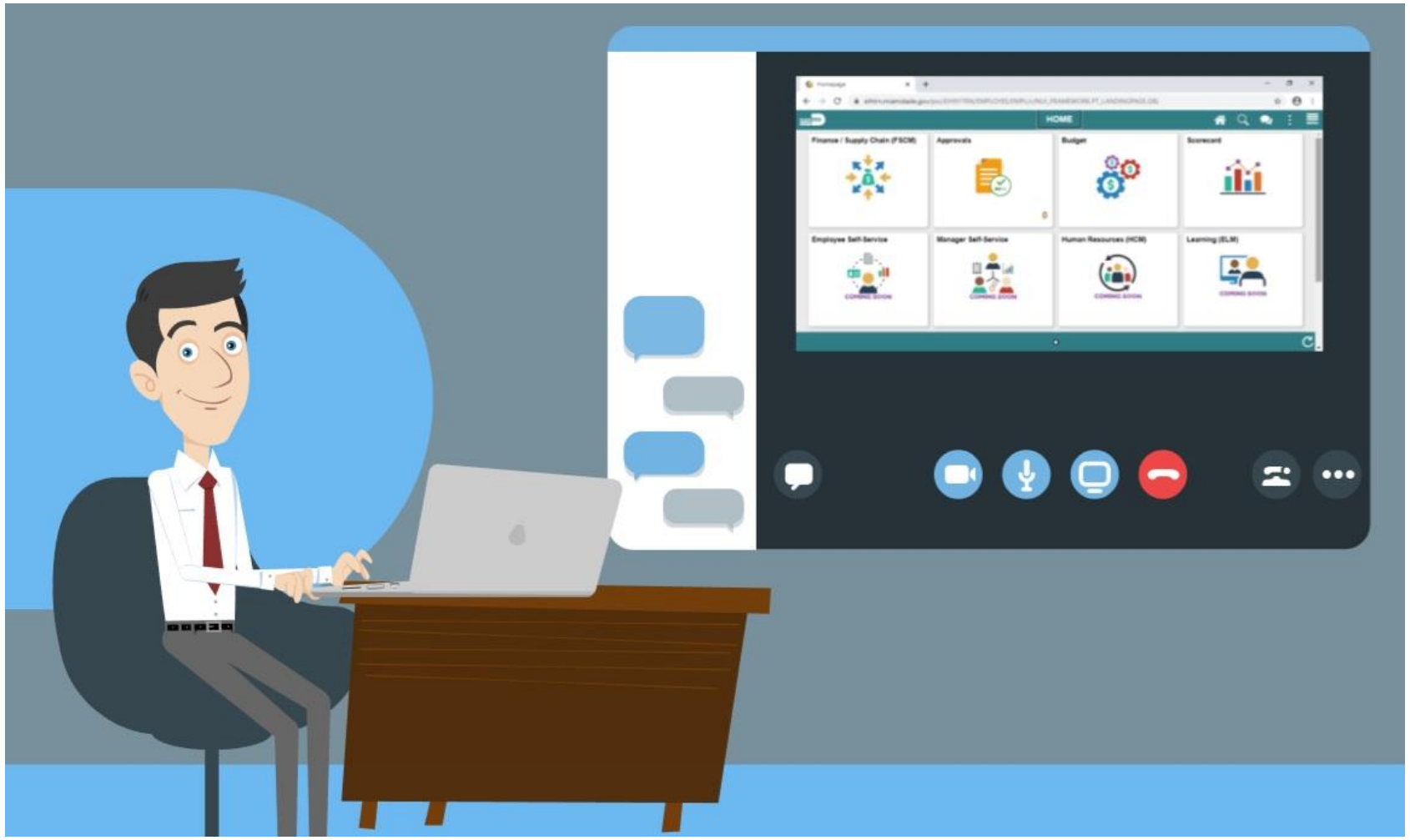
Navigate to Job Data: **HCM > HR Administration > Job Information > Job Data.**

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.





Lesson 5: Activities and Exercises



Lesson 5: 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

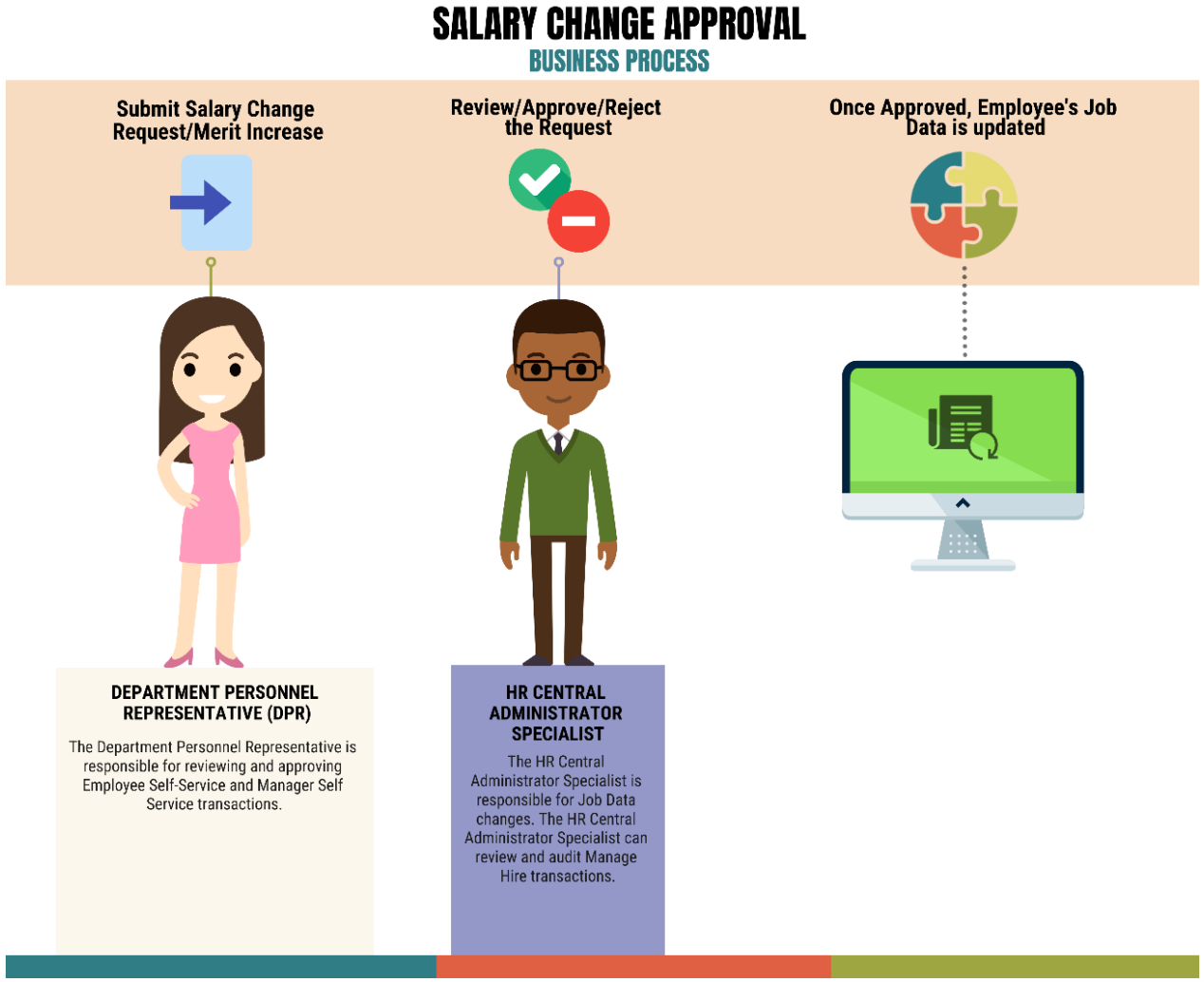
At the conclusion of this lesson, participants will be able to:

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

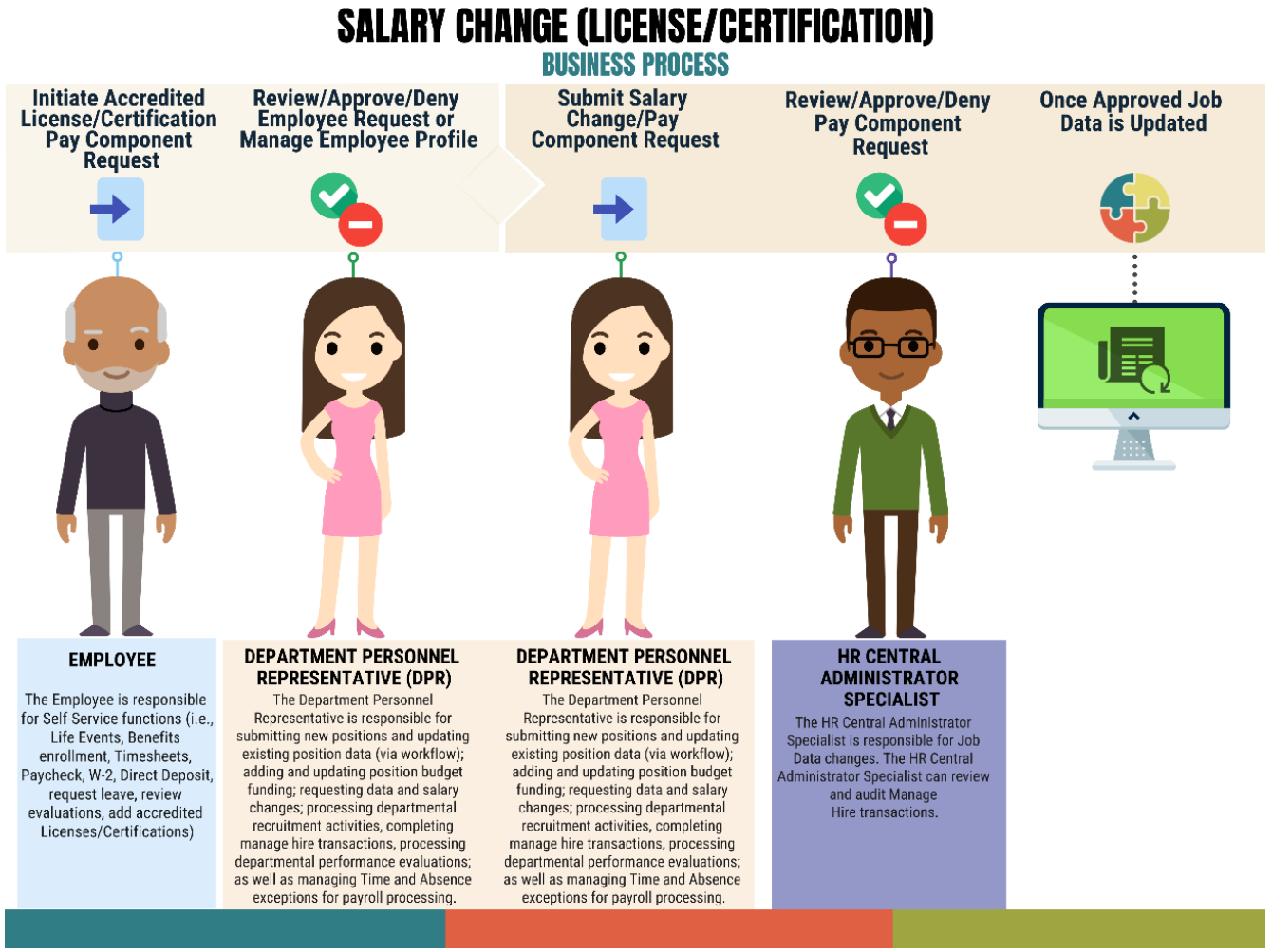
Lesson 6: Key Terms

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

Lesson 6: Submitting HR Salary Changes



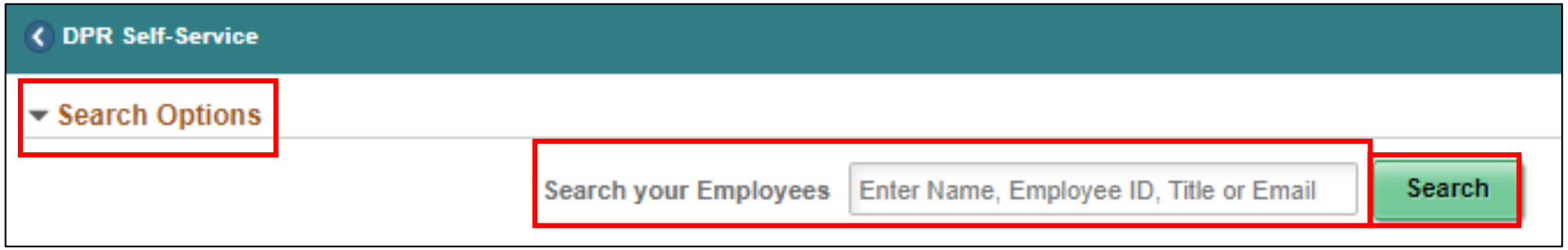
Lesson 6: Submitting HR Salary Changes



Lecture 1: Merit Increase (Salary Grade)

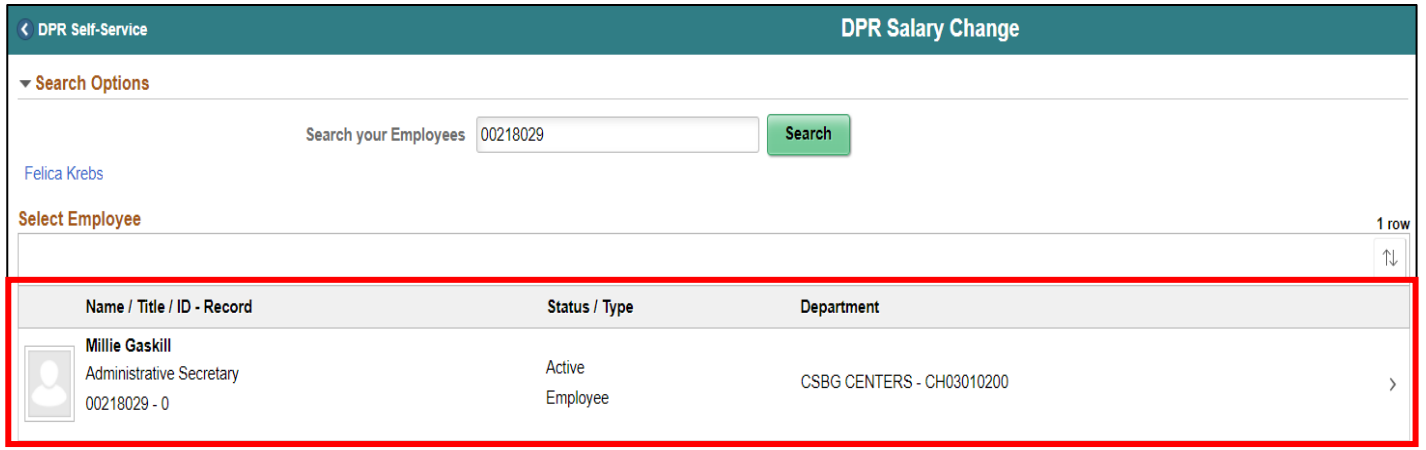
Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

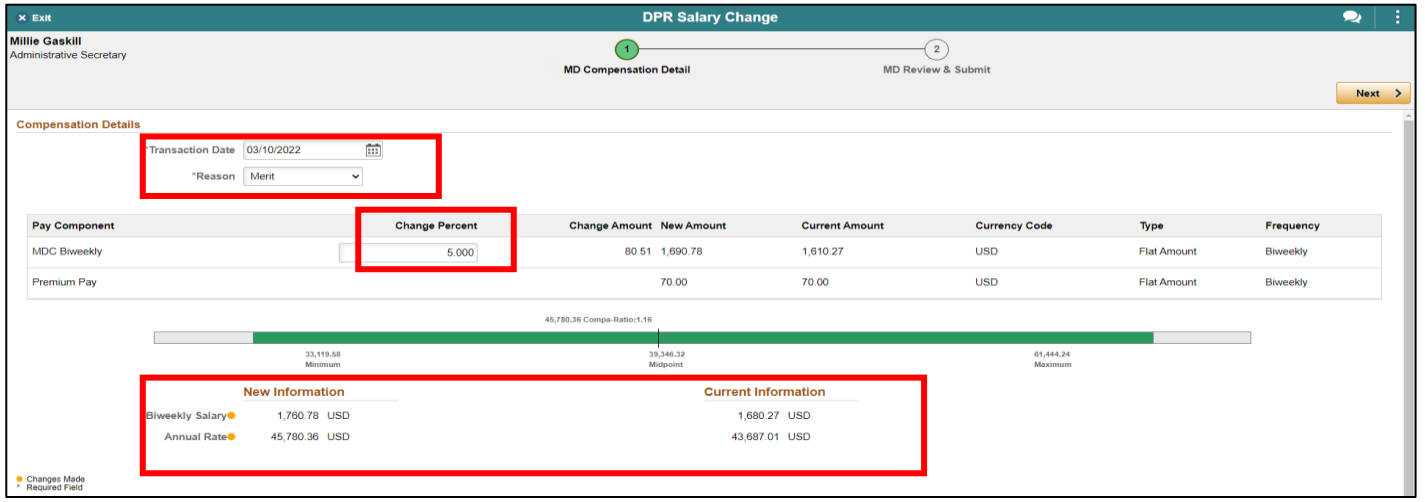
1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter either the **Employee's Name or Employee ID #.**
3. Select **Search.**



Lecture 1: Merit Increase (Salary Grade) Cont'd

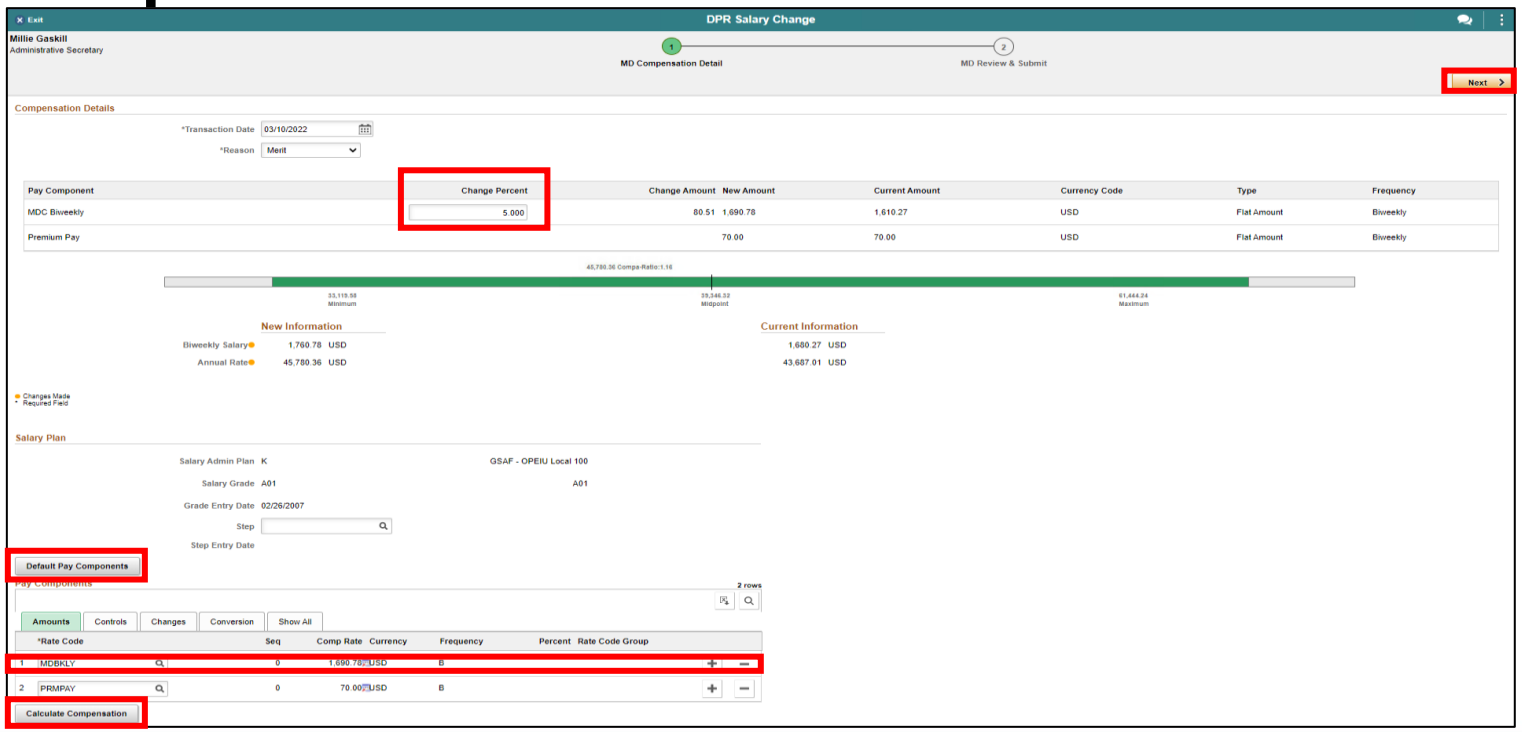
4. Select the **Employee's Record**.
5. Under the **Compensation Details** section, in the ***Transaction Date field** enter the **effective date of the merit request.**
6. In the ***Reason** field select **Merit.**
7. In the **Change Percent** field enter the **merit increase in decimal form.**
8. Tab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





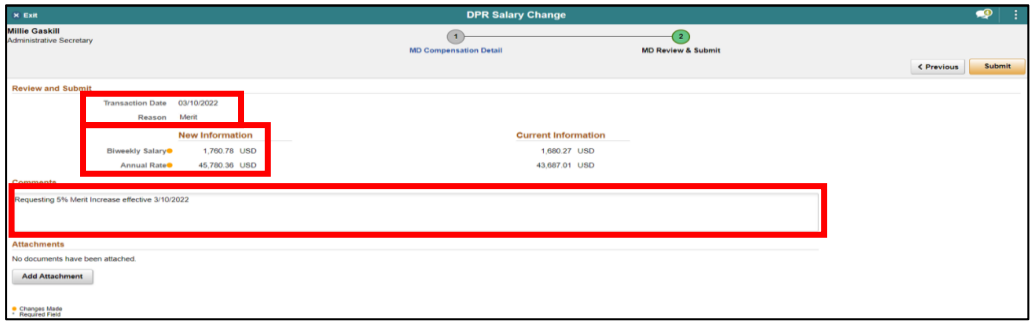
Lecture 1: Merit Increase (Salary Grade) Cont'd

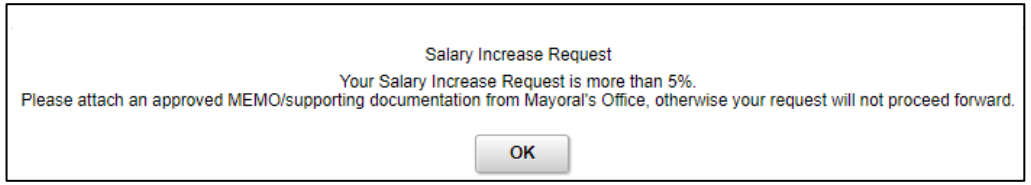
10. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate
11. Select **Calculate Compensation**
12. Select **Next**

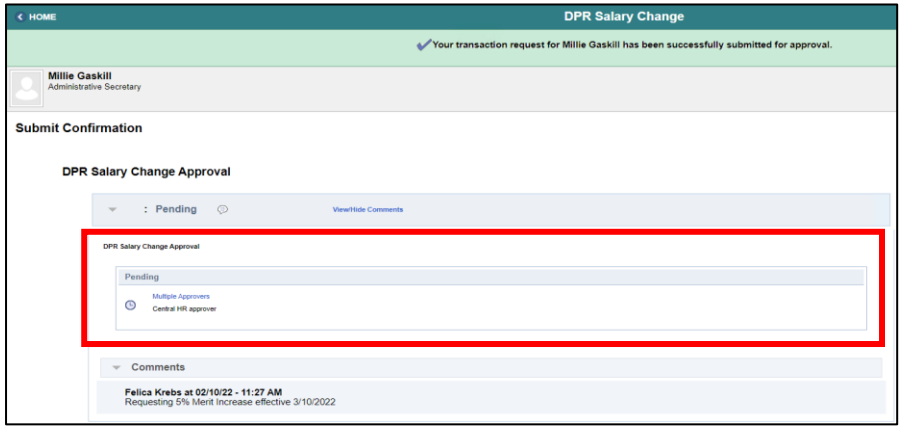


Lecture 1: Merit Increase (Salary Grade) Cont'd

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
    - **NOTE:** If the merit increase is more than 5% you will receive 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.





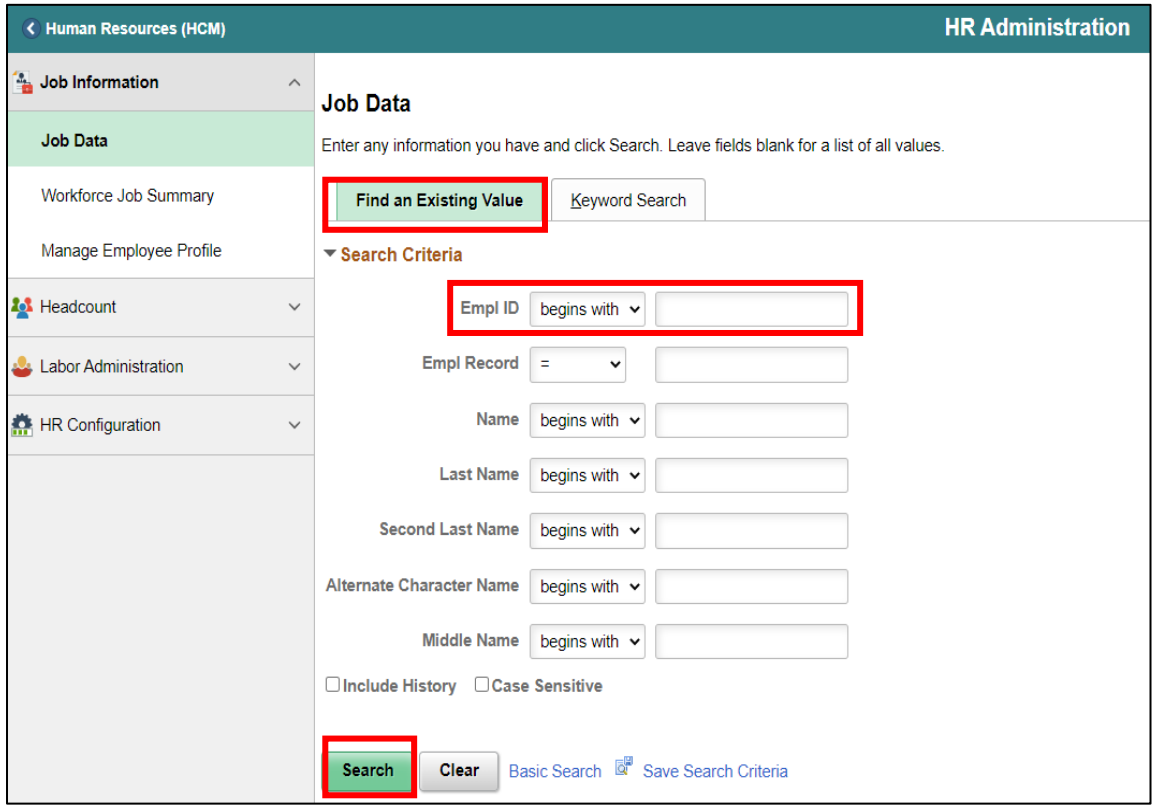


Lecture 1: Verify Merit Increase (Salary Grade)

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

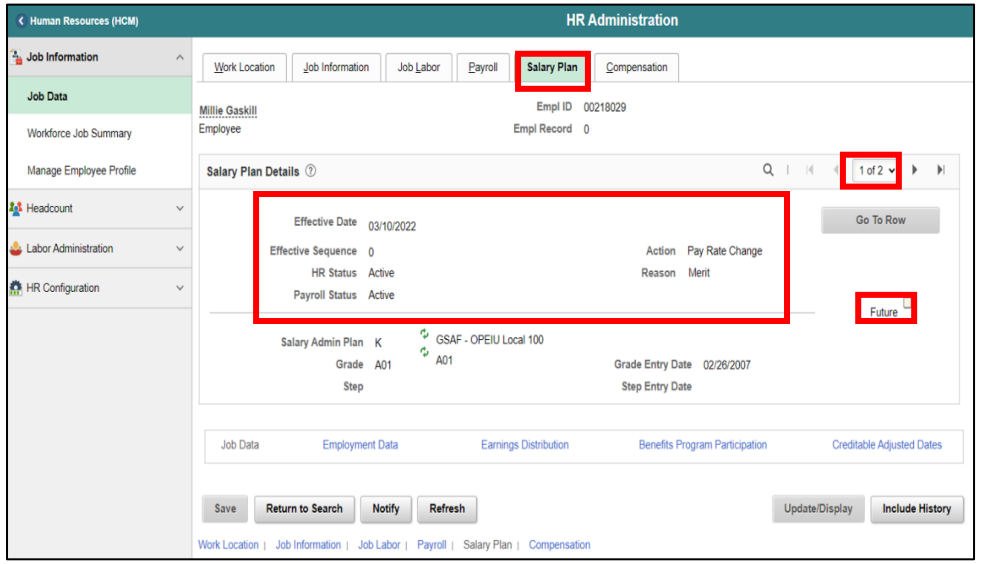
Navigate to Job Data: **Human Resources (HCM) > HR Administration > Job Information > Job Data**

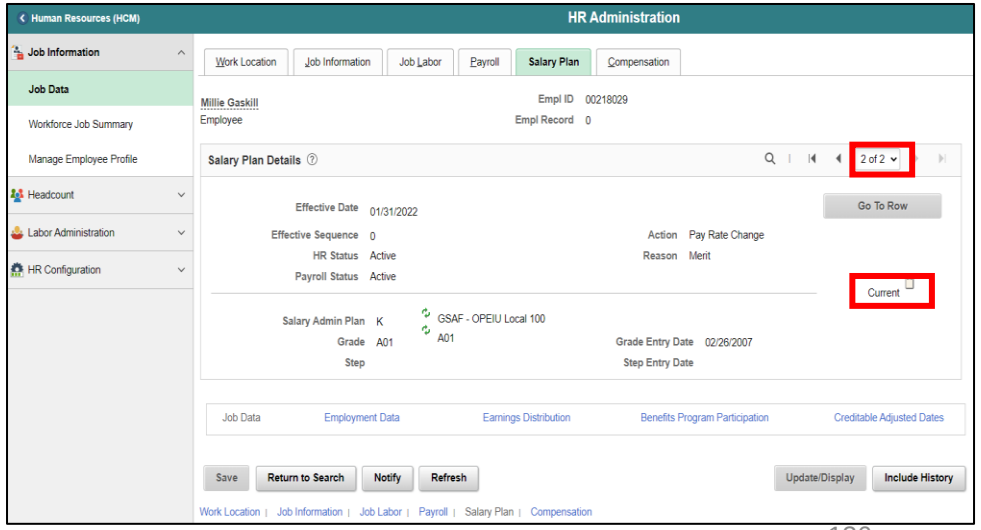
1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search.**



Lecture 1: Verify Merit Increase (Salary Grade) Cont'd

4. Select the **Salary Plan** tab
   - The employee's job data record is displayed with the recent record first. Notice the employee has two records 1 of 2.
     - 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**.
   - 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.

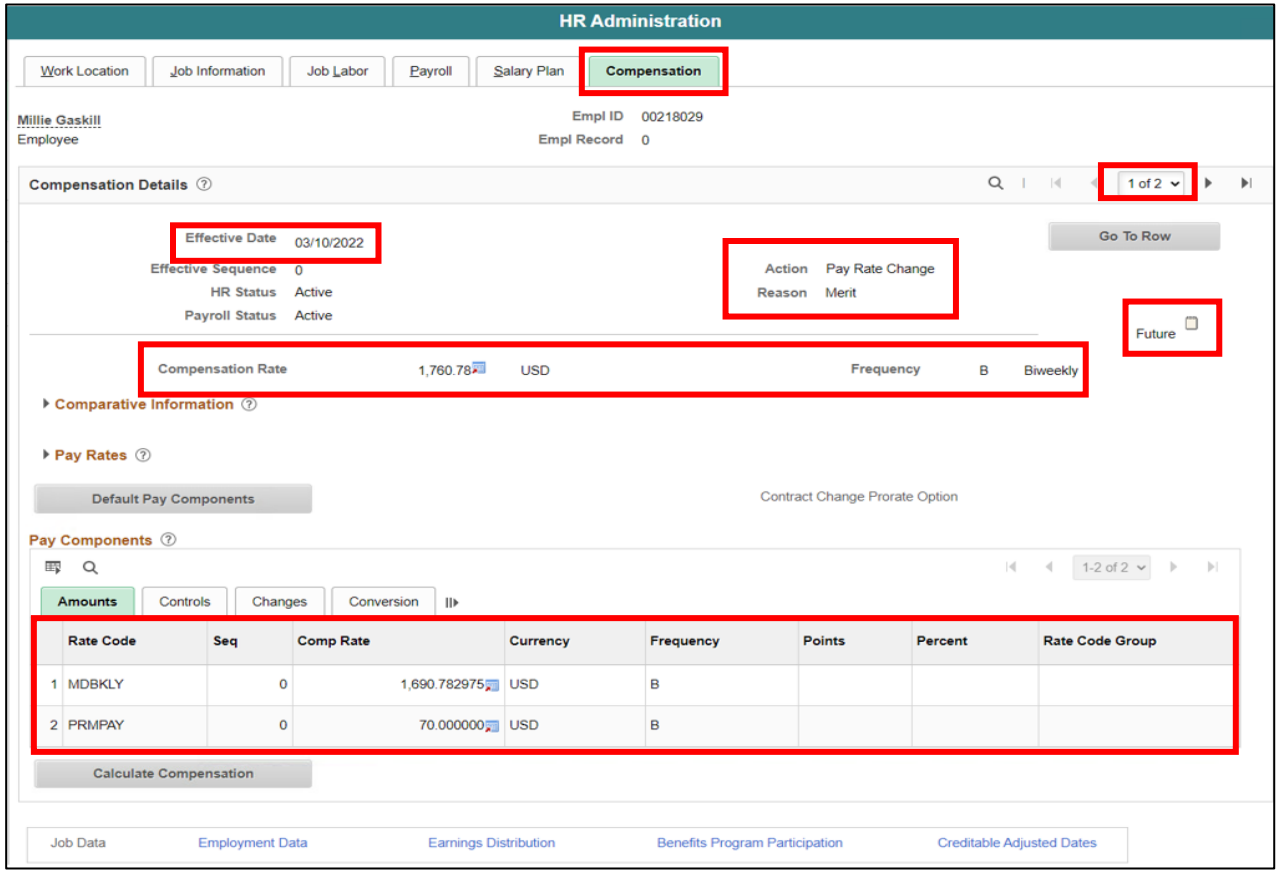




Lecture 1: Verify Merit Increase (Salary Grade) Cont'd

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

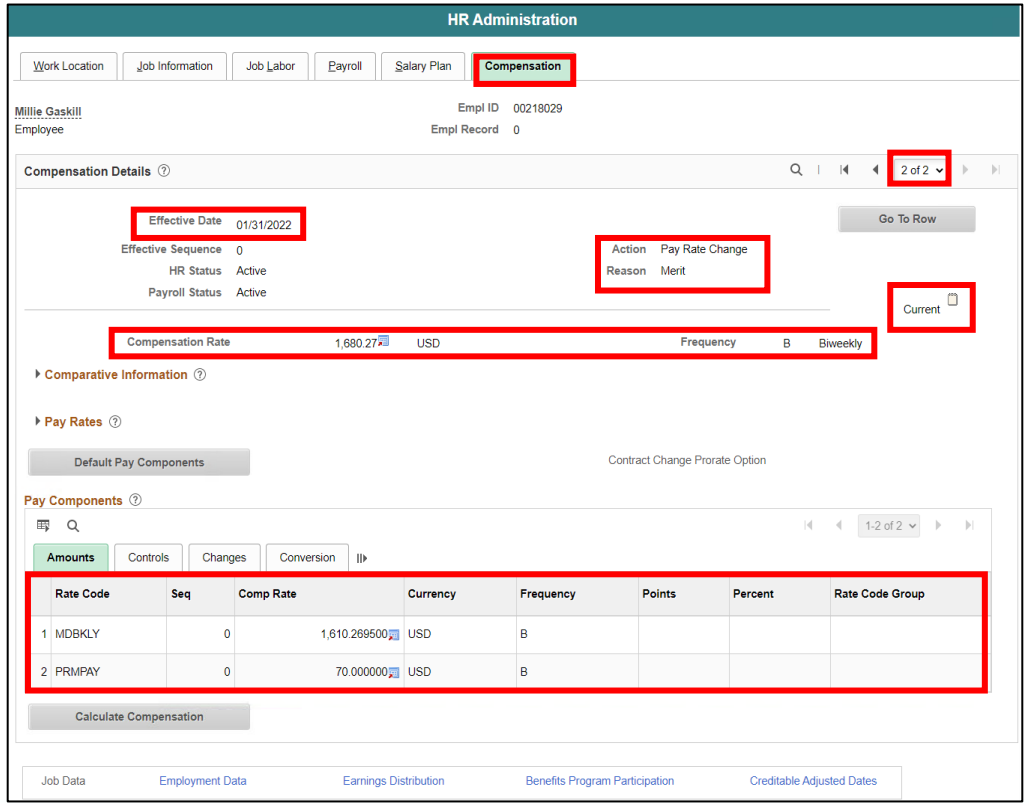
5. Select the **Compensation** tab to see the Compensation Details between Record 1 and Record 2.
   - Displayed below is the **Effective Date, Action, Reason, and the new Compensation Rate** for the **Future** record.



Lecture 1: Verify Merit Increase (Salary Grade) Cont'd

Record **2 of 2**

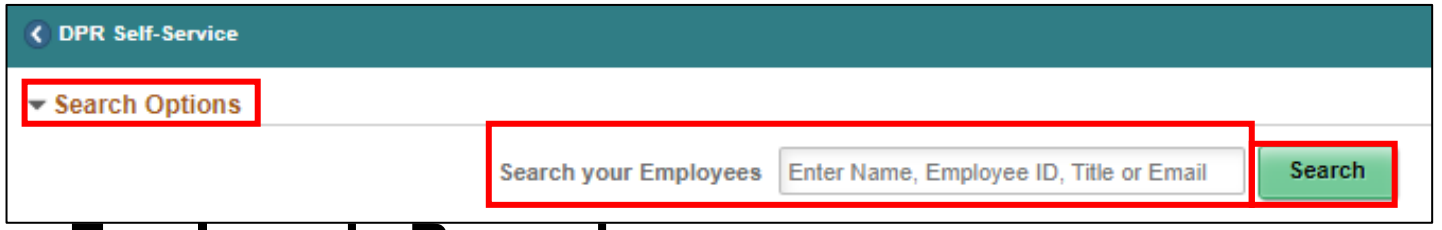
- Displayed below is the **Effective Date, Action, Reason**, and the previous **Compensation Rate** for the **Current** record.



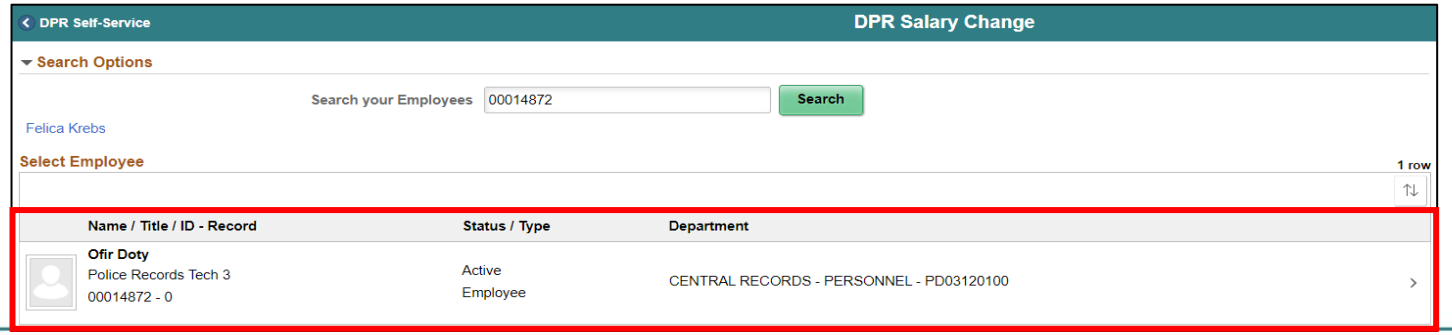
Lecture 2: Merit Increase (Salary Step)

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**

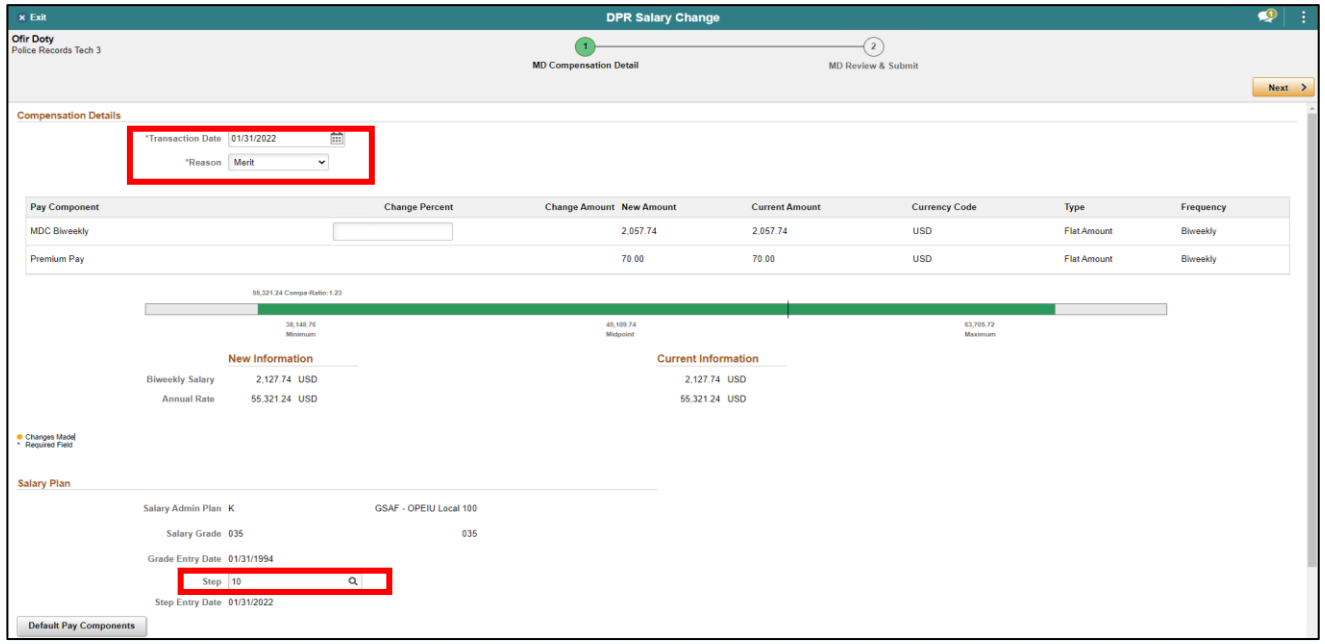


4. Select the **Employee's Record**



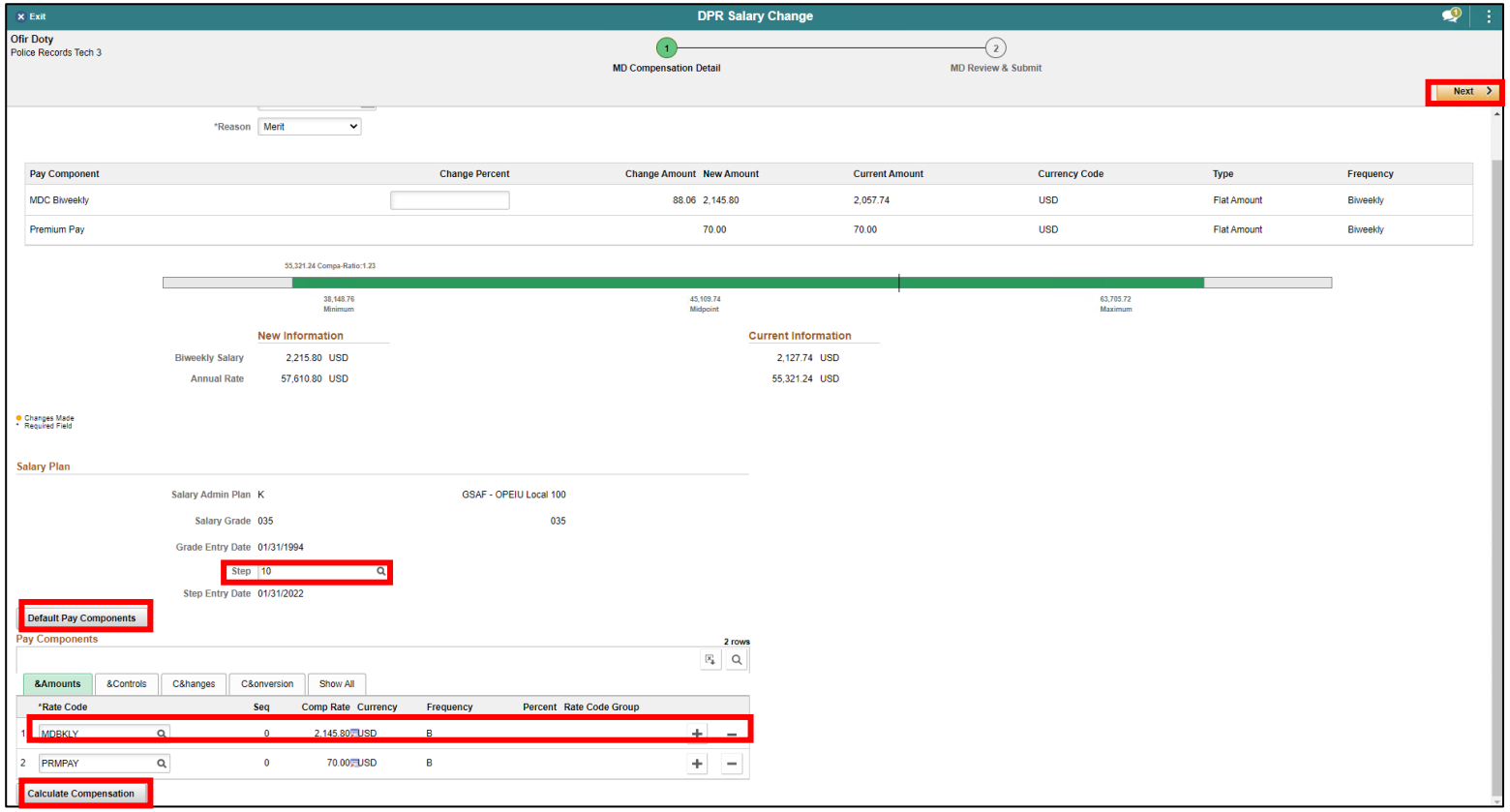
Lecture 2: Merit Increase (Salary Step) Cont'd

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**



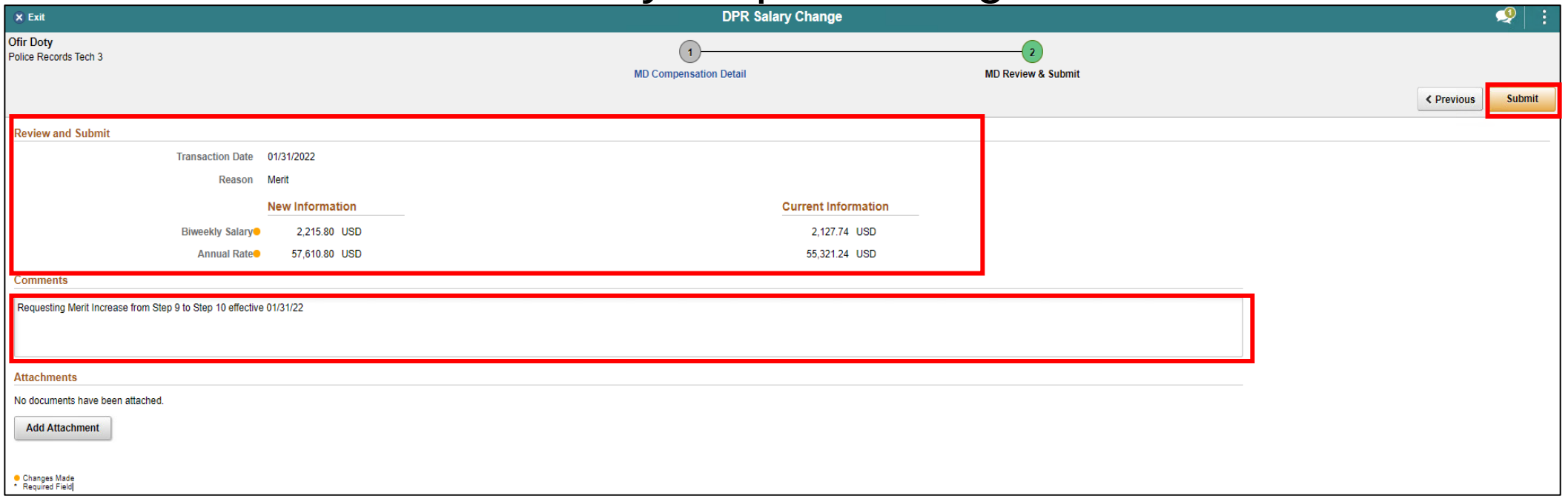
Lecture 2: Merit Increase (Salary Step) Cont'd

8. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate
9. Select **Calculate Compensation**
10. Select **Next**



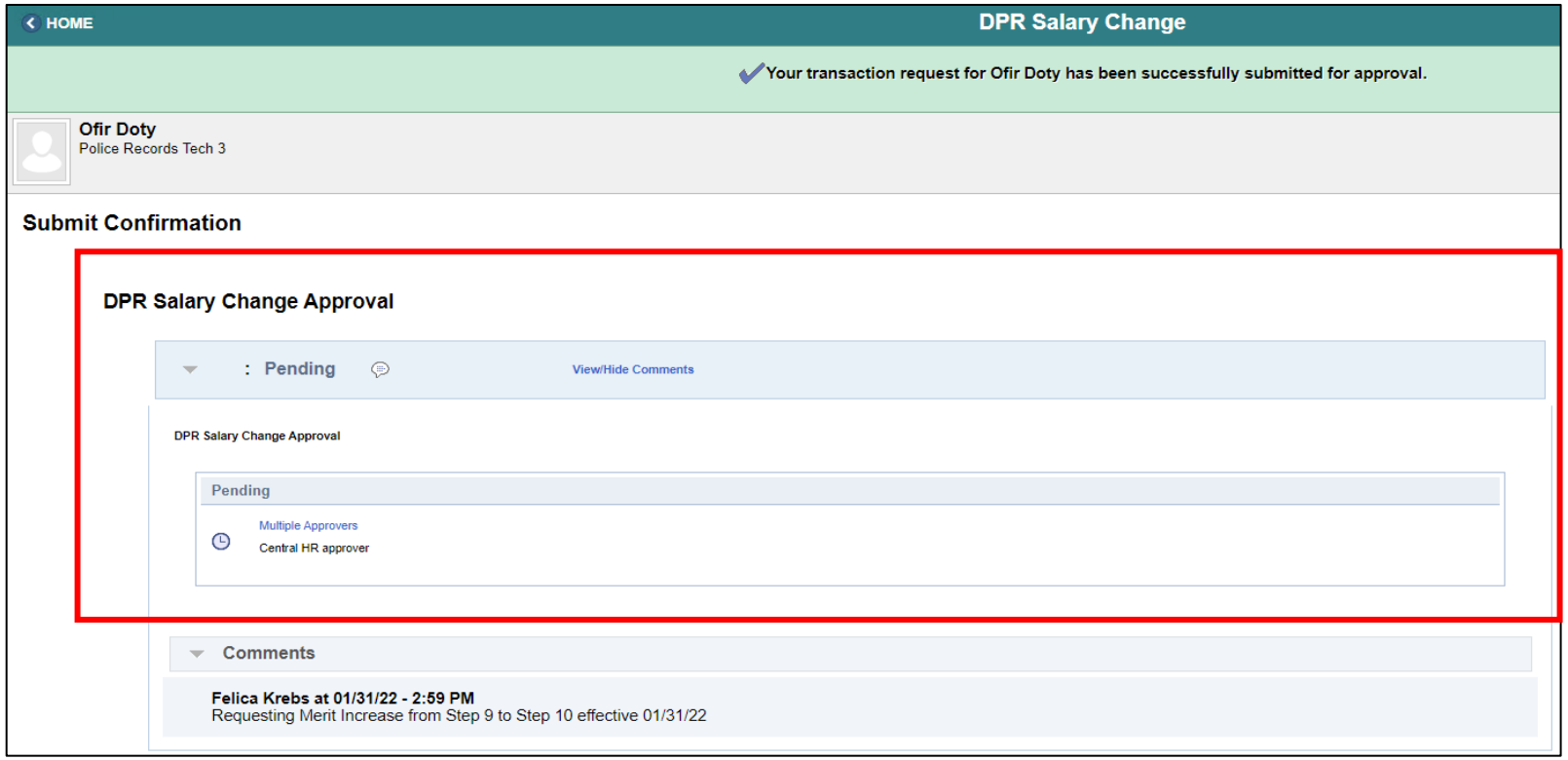
Lecture 2: Merit Increase (Salary Step) Cont'd

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.



Lecture 2: Merit Increase (Salary Step) Cont'd

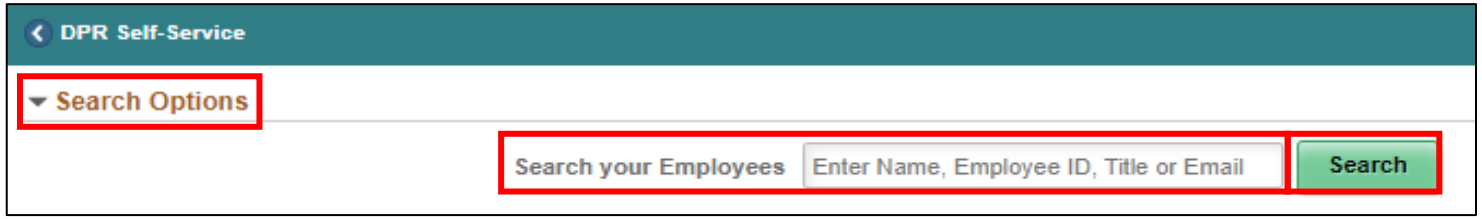
- DPR Request HR Salary Change confirmation page is display and the request is now pending the approval by Central HR.



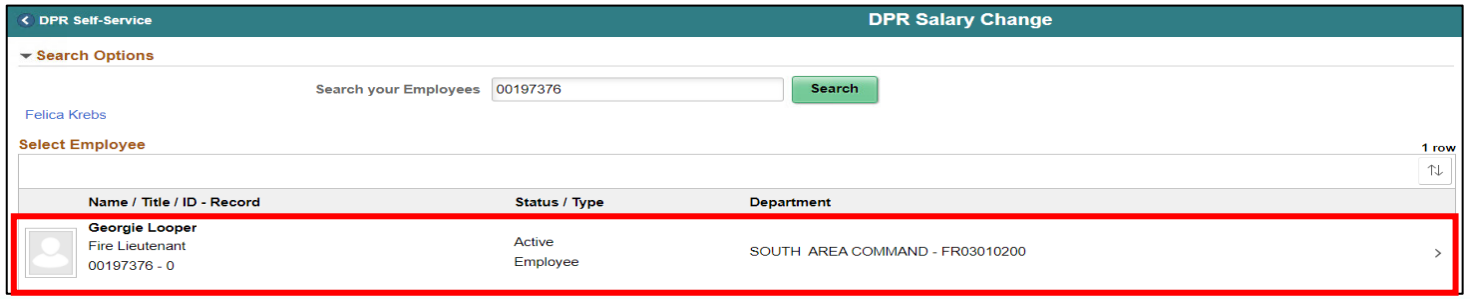
Lecture 3: Pay Components (Pay Supplements)

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**

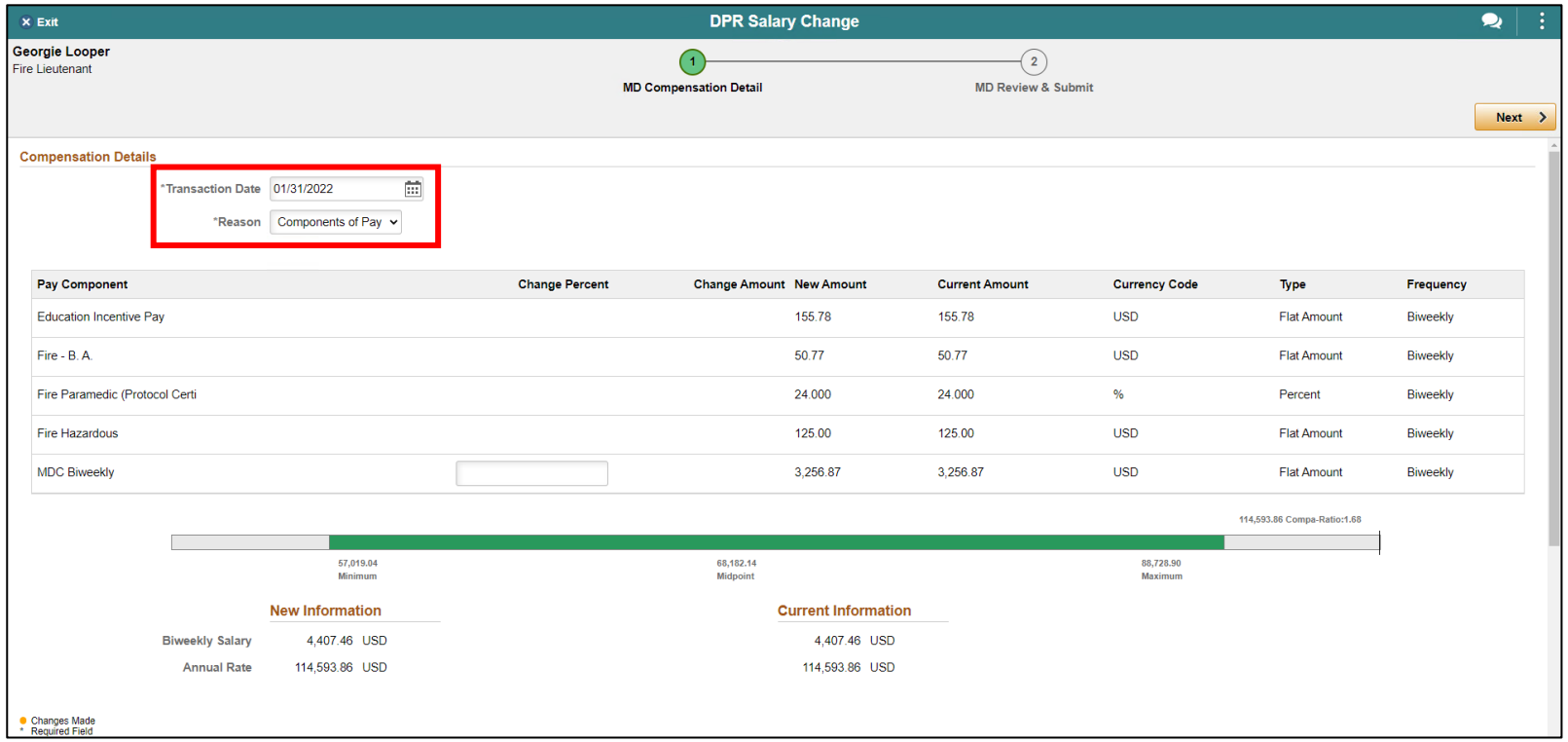


4. Select the **Employee's Record**



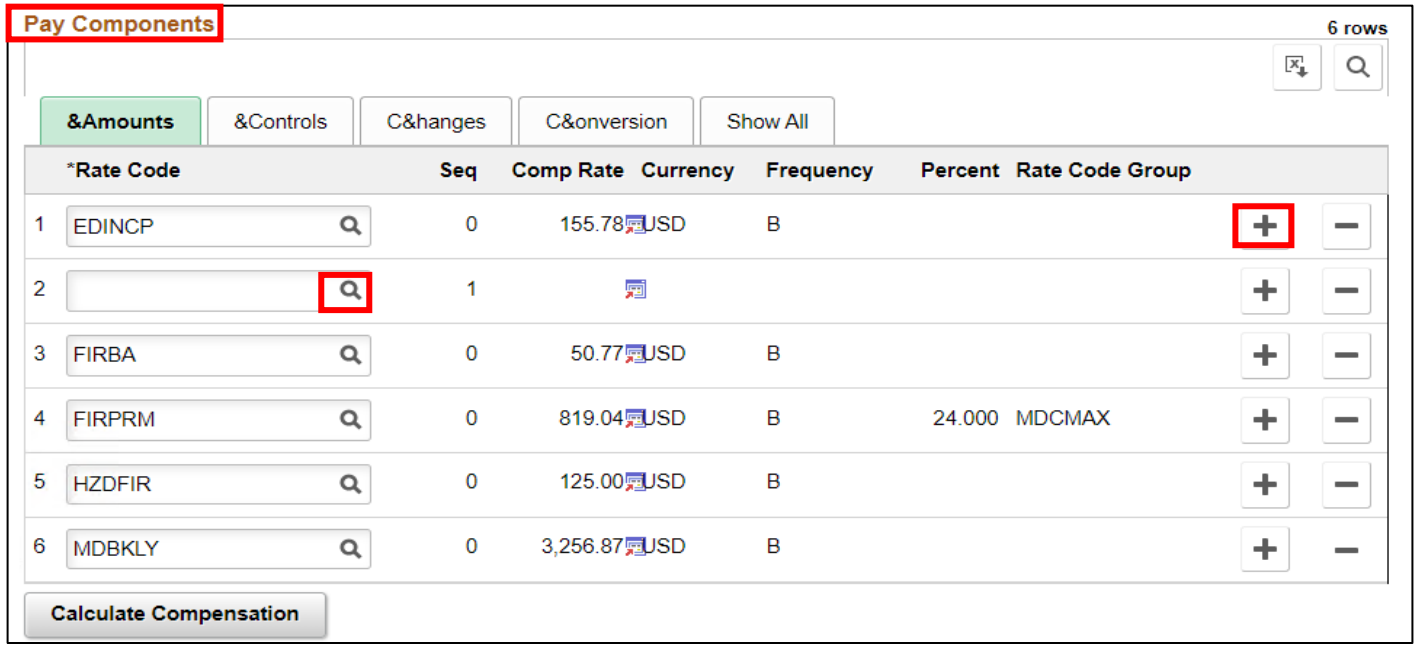
Lecture 3: Pay Components (Pay Supplements) Cont'd

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



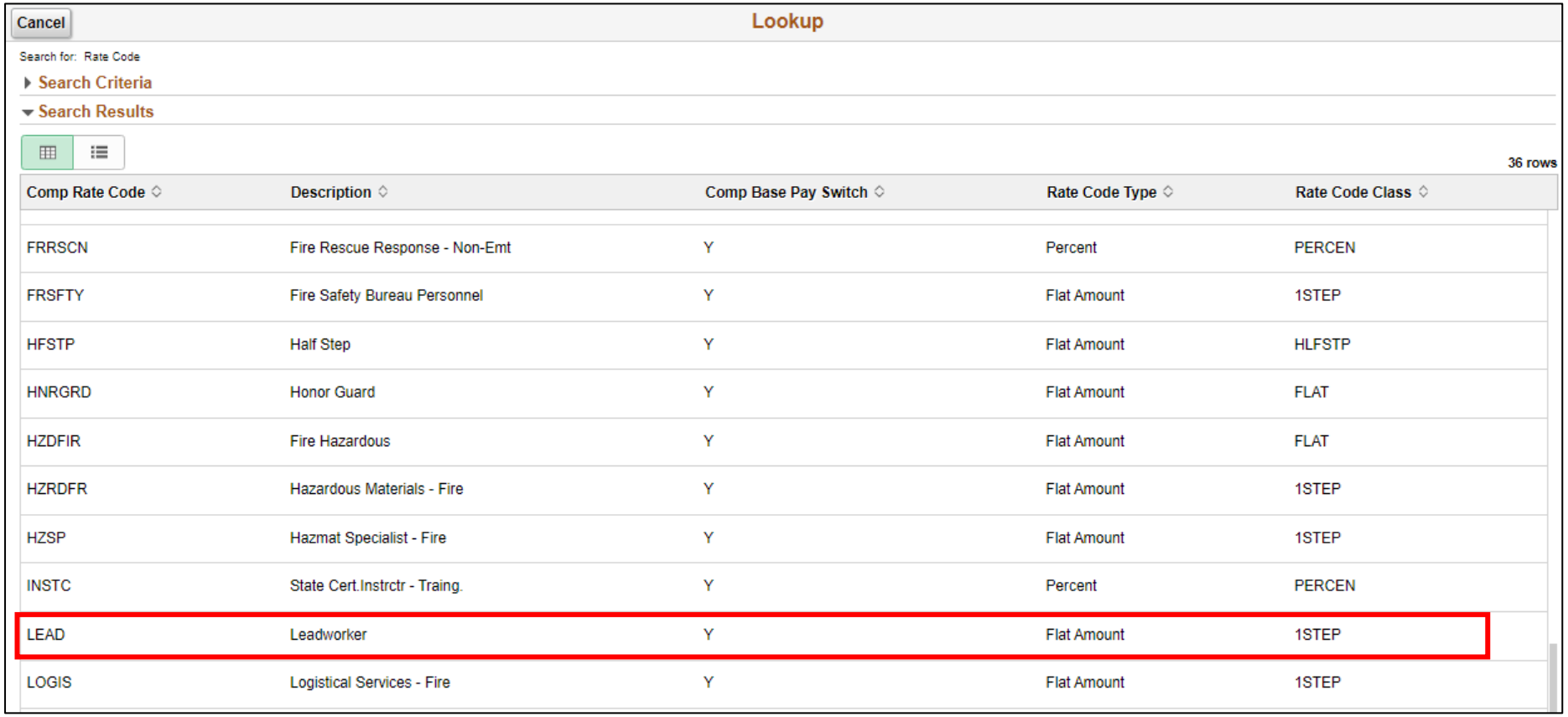
Lecture 3: Pay Components (Pay Supplements) Cont'd

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



Lecture 3: Pay Components (Pay Supplements) Cont'd

10. Select **LEAD** for Leadworker



Cancel

Lookup

Search for: Rate Code

Search Criteria

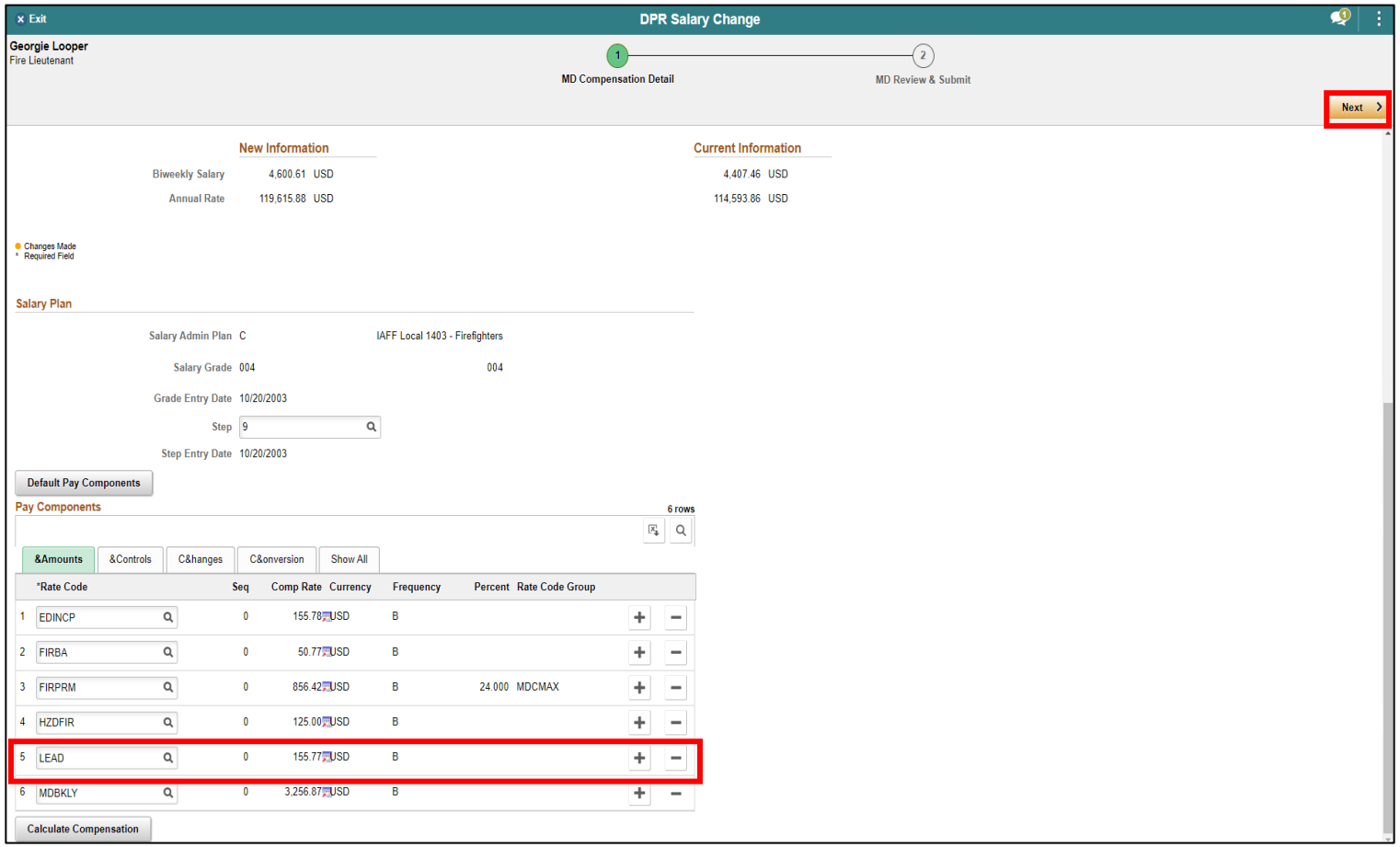
Search Results

36 rows

Comp Rate Code	Description	Comp Base Pay Switch	Rate Code Type	Rate Code Class
FRRSCN	Fire Rescue Response - Non-Emt	Y	Percent	PERCEN
FRSFTY	Fire Safety Bureau Personnel	Y	Flat Amount	1STEP
HFSTP	Half Step	Y	Flat Amount	HLFSTP
HNRGRD	Honor Guard	Y	Flat Amount	FLAT
HZDFIR	Fire Hazardous	Y	Flat Amount	FLAT
HZRDFR	Hazardous Materials - Fire	Y	Flat Amount	1STEP
HZSP	Hazmat Specialist - Fire	Y	Flat Amount	1STEP
INSTC	State Cert.Instrctr - Traing.	Y	Percent	PERCEN
LEAD	Leadworker	Y	Flat Amount	1STEP
LOGIS	Logistical Services - Fire	Y	Flat Amount	1STEP

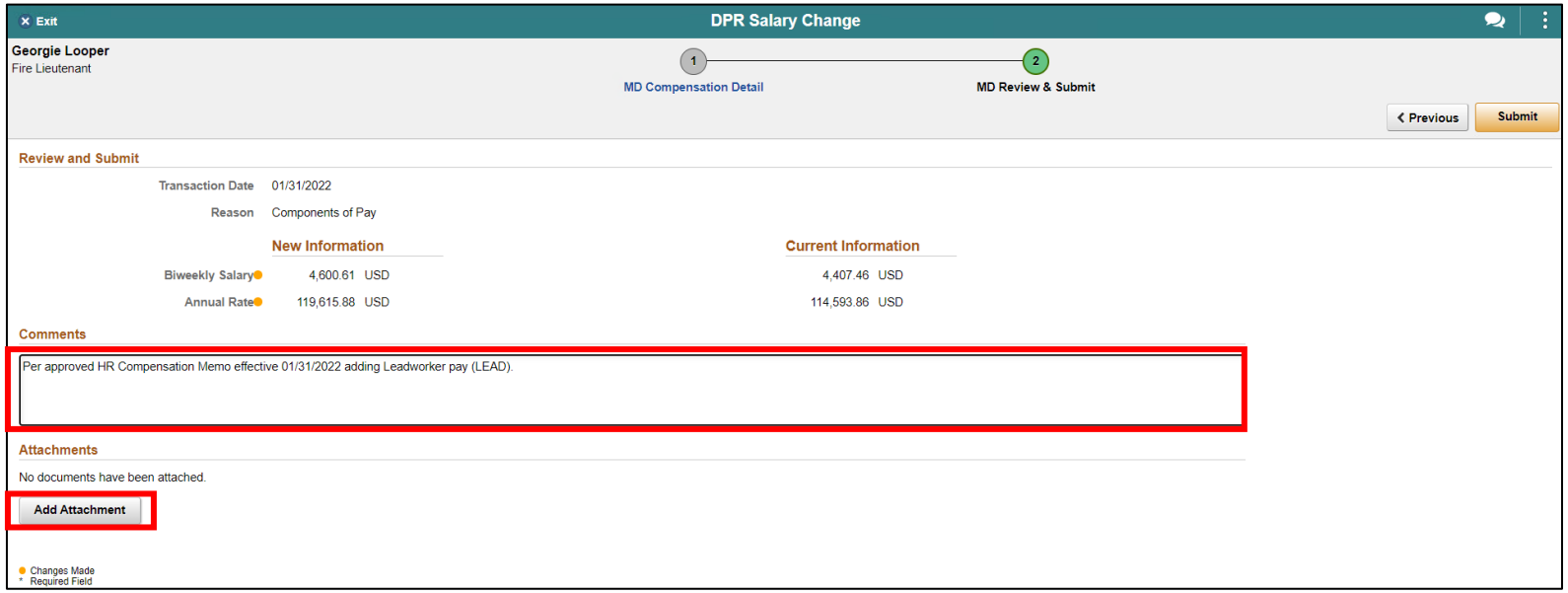
Lecture 3: Pay Components (Pay Supplements) Cont'd

11. Select **Default Pay Components**
12. Select **Calculate Compensation**
    - Notice the LEAD (Leadworker) supplemental pay added to the Pay Components section.
13. Select **Next**



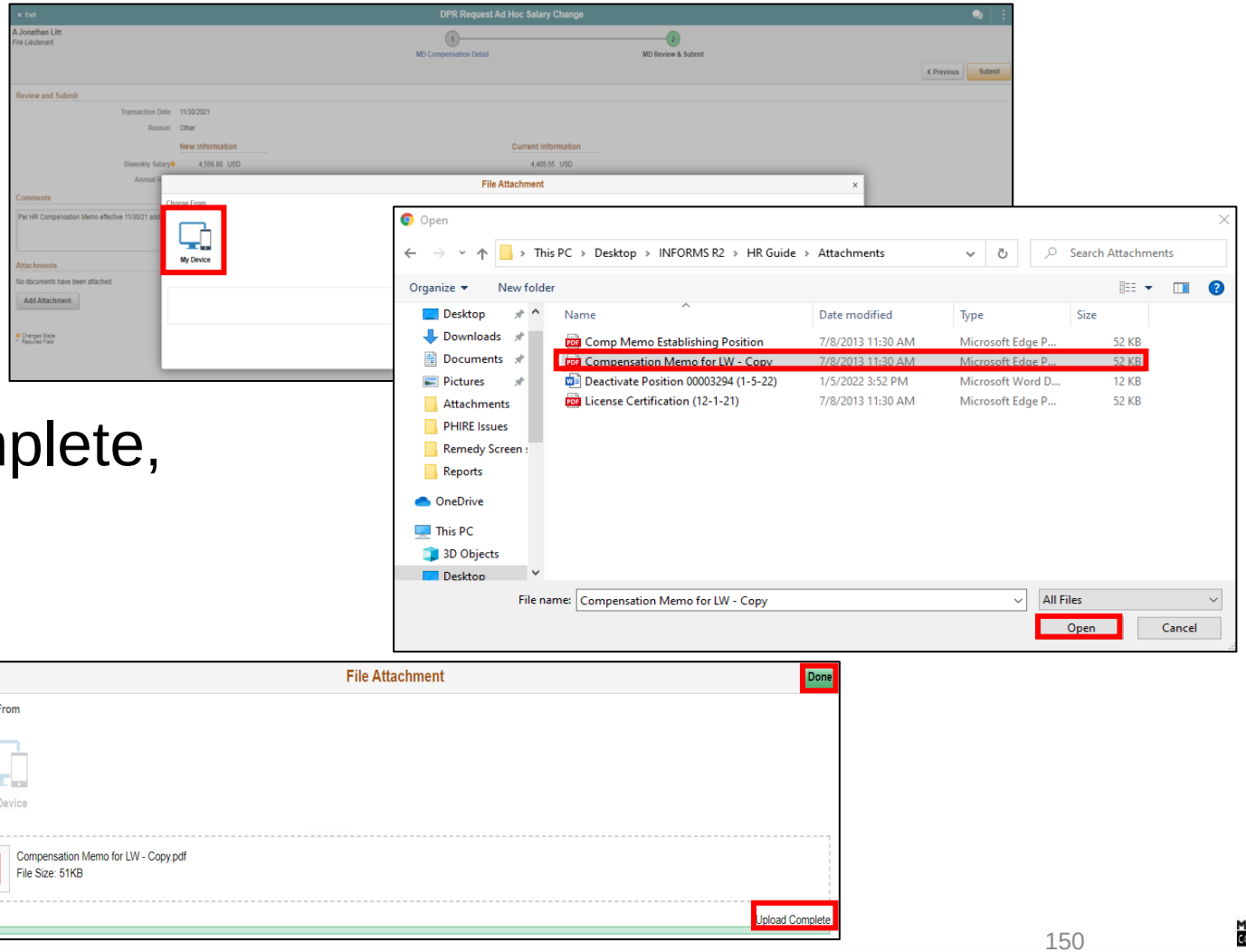
Lecture 3: Pay Components (Pay Supplements) Cont'd

14. In the **Comments** section, enter a brief description of the request
    - **NOTE:** Approved HR Compensation Memoranda 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.



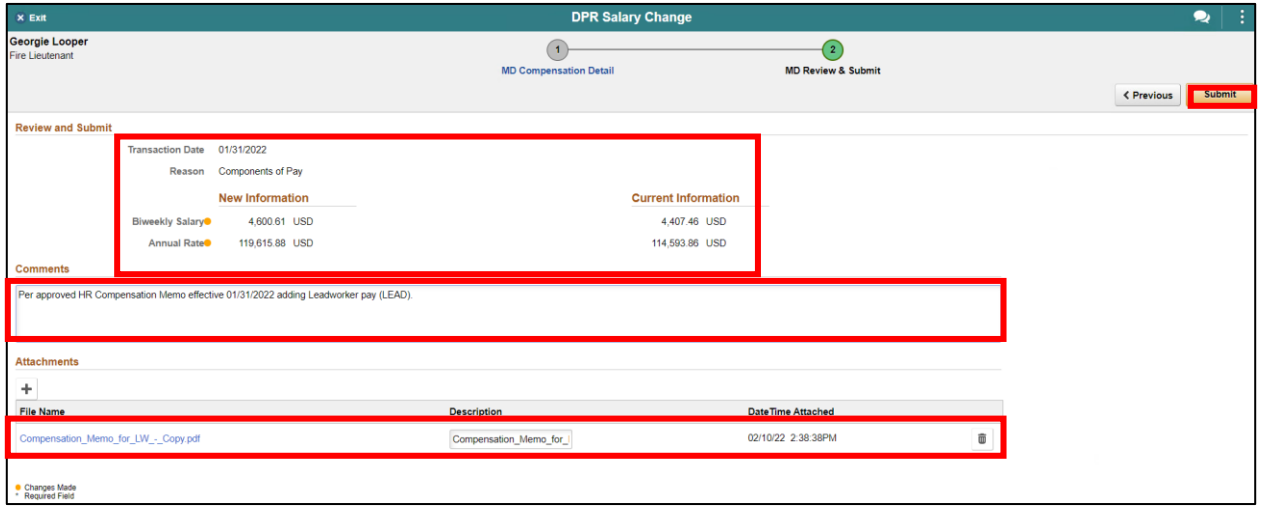
Lecture 3: Pay Components (Pay Supplements) Cont'd

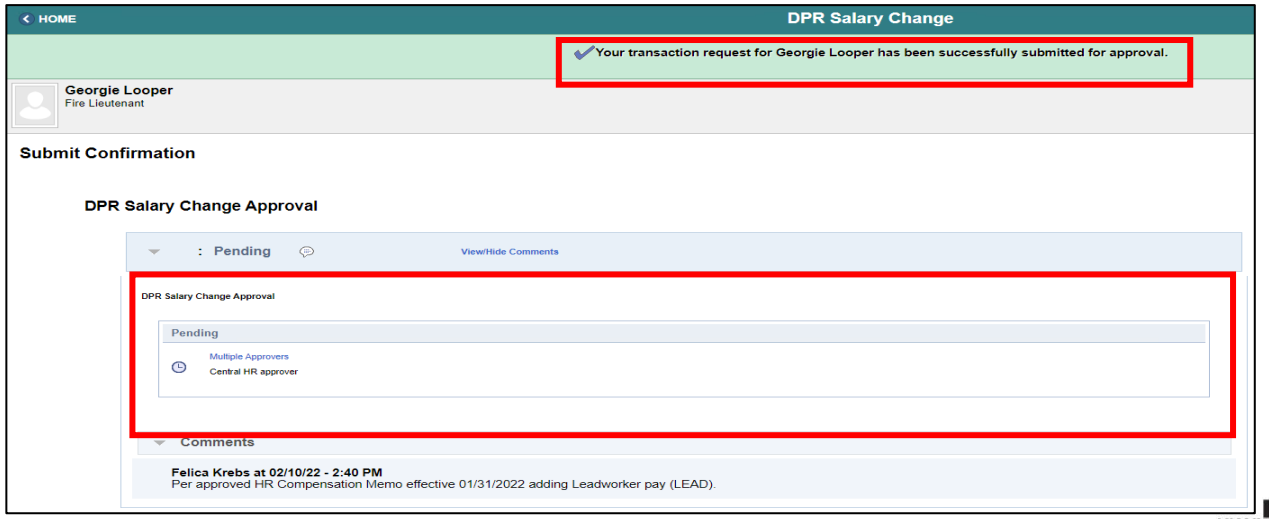
16. Select **My Device**
17. Locate and select **the documentation**
18. Select **Open**
19. Select **Upload**
20. Once the upload is complete, select **Done**



Lecture 3: Pay Components (Pay Supplements) Cont'd

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.

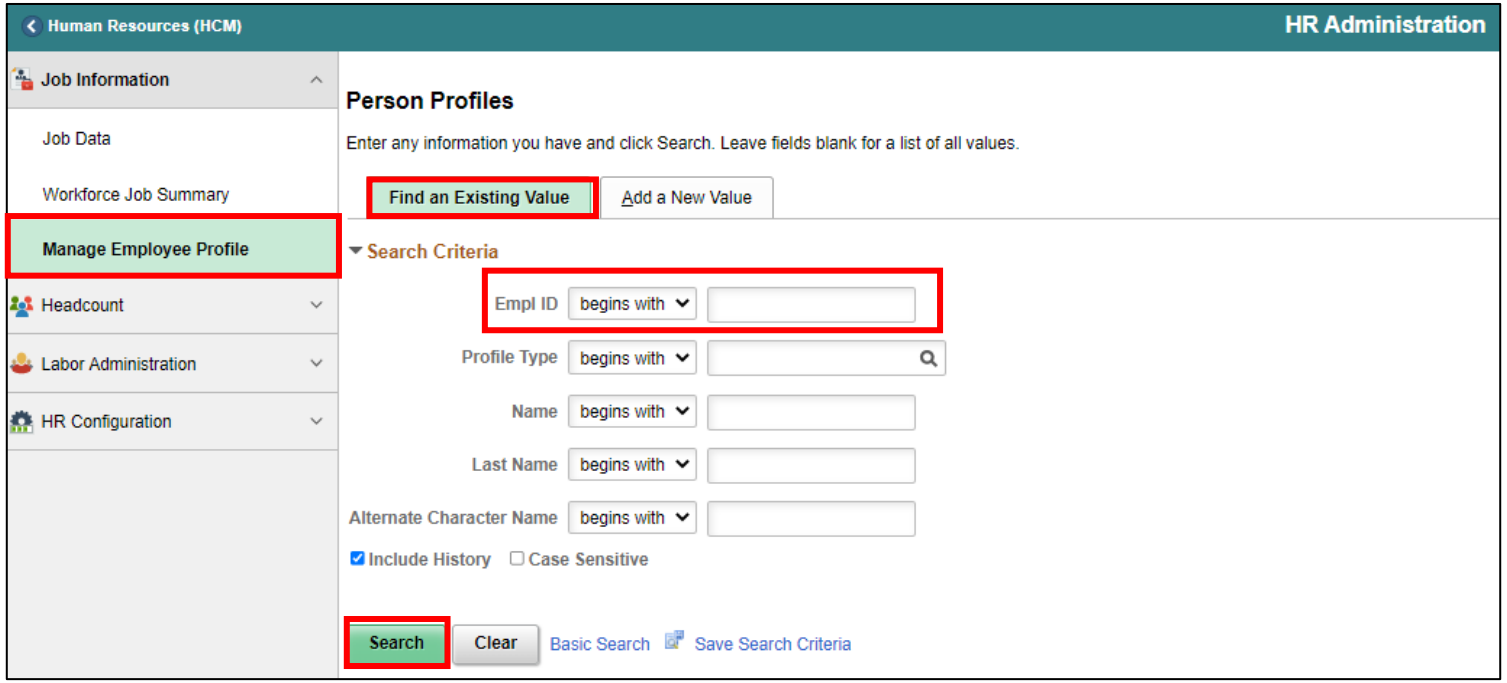




Lecture 4: Pay Components (License/ Certifications)

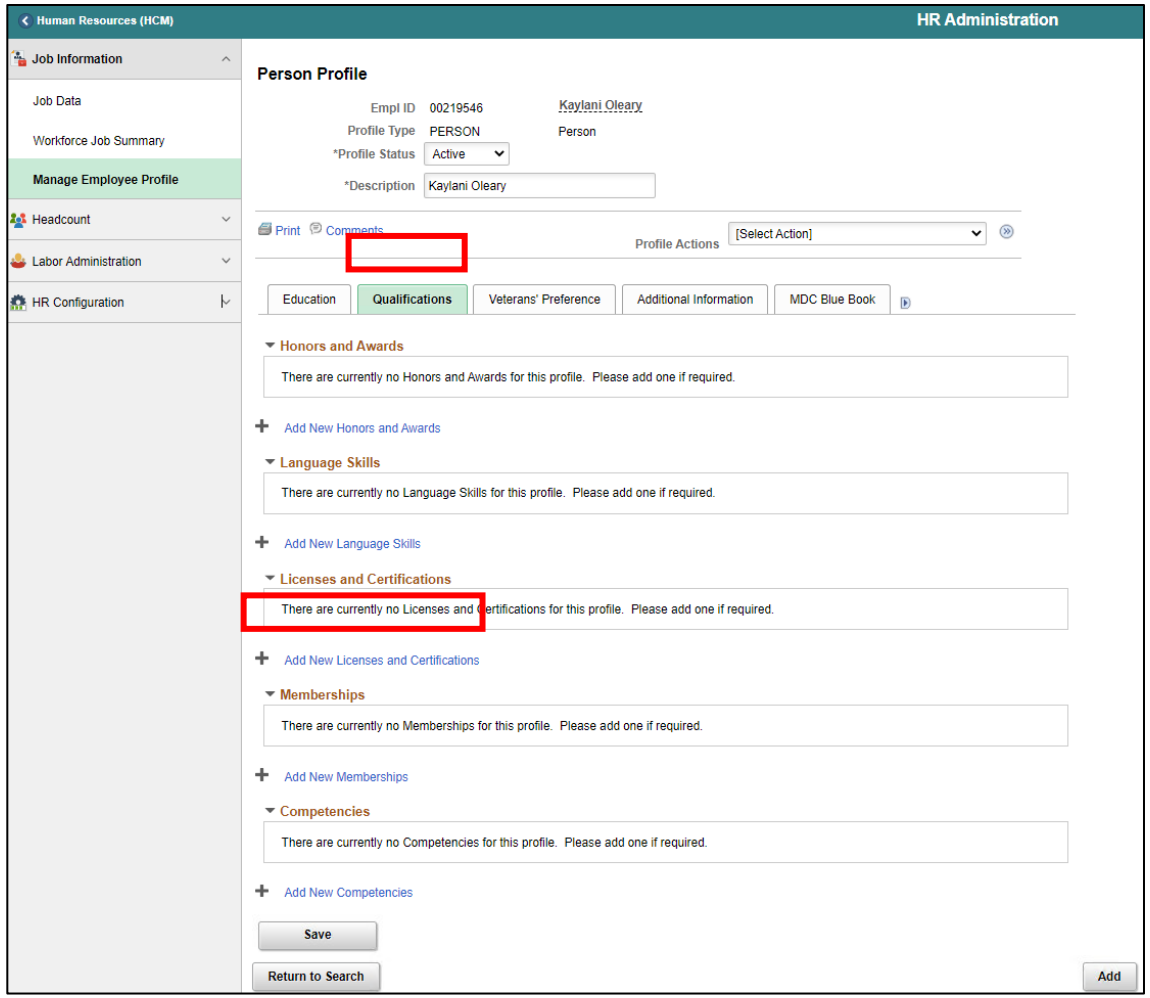
Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile**

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**



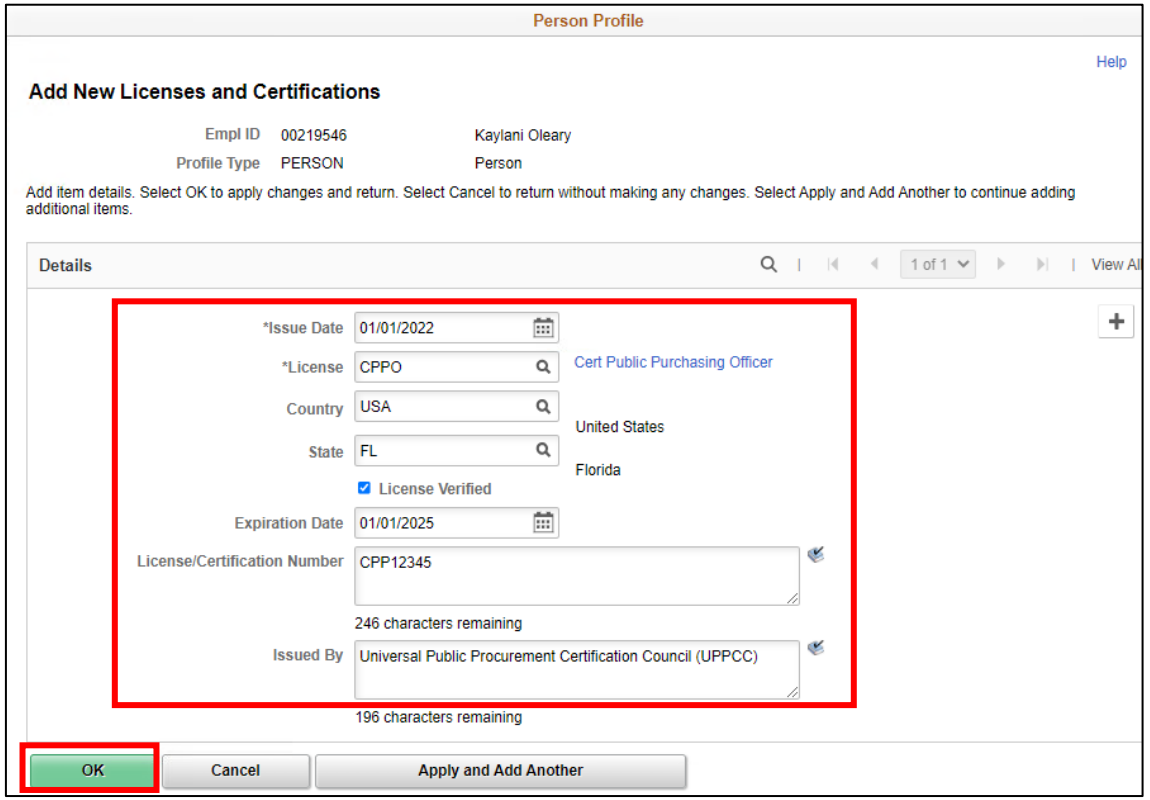
Lecture 4: Pay Components (License/ Certifications) Cont'd

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



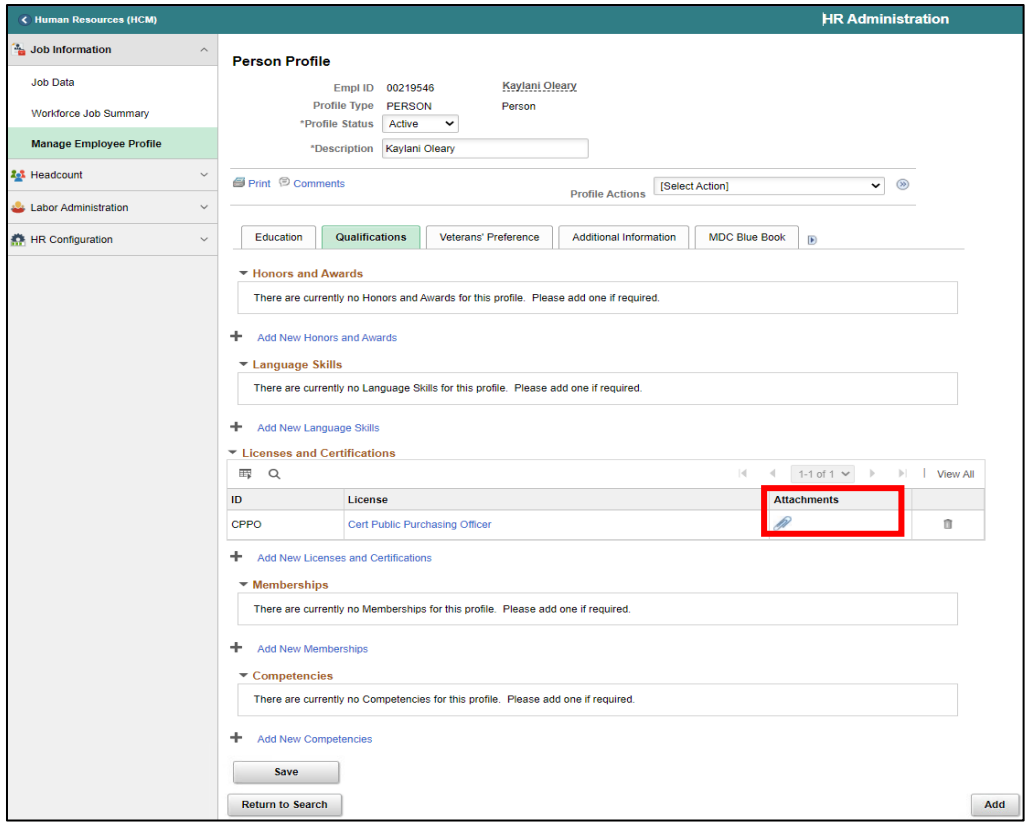
Lecture 4: Pay Components (License/ Certifications) Cont'd

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**.



Lecture 4: Pay Components (License/ Certifications) Cont'd

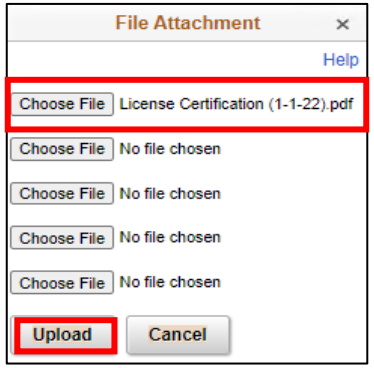
15. Under **Attachment**, select the **paper clip** to add the license/certification documentation



Lecture 4: Pay Components (License/ Certifications) Cont'd

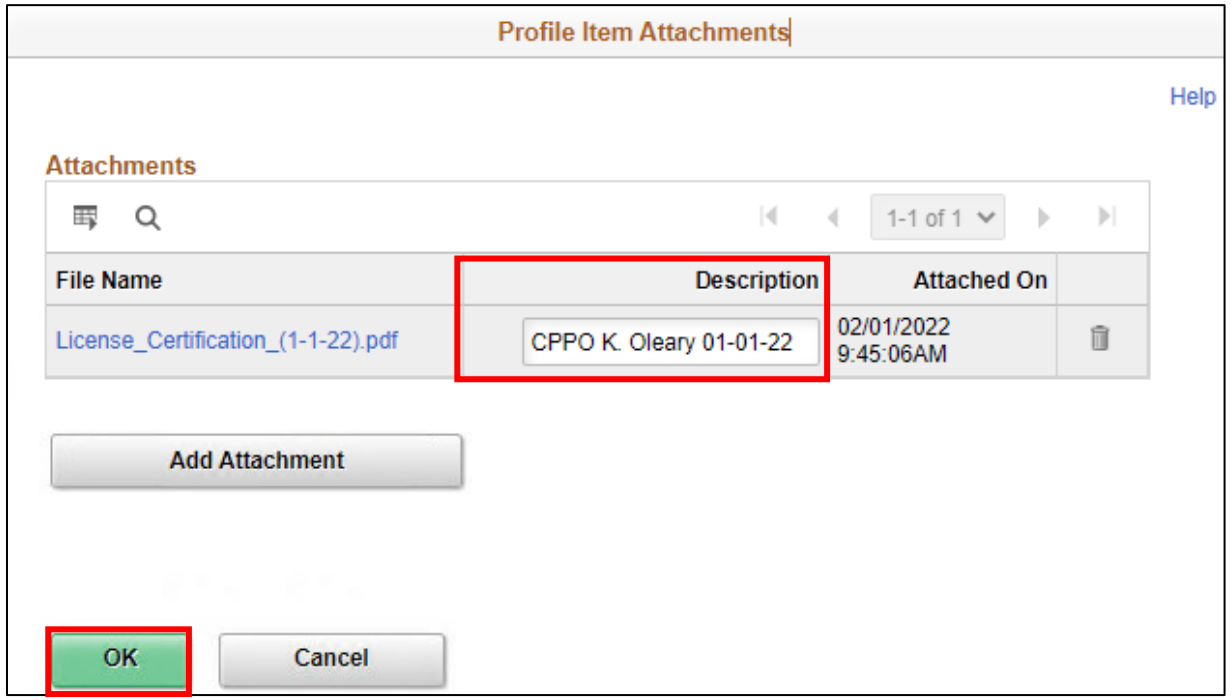
16. Select **Add Attachment** to enclose the license/certification documentation.

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



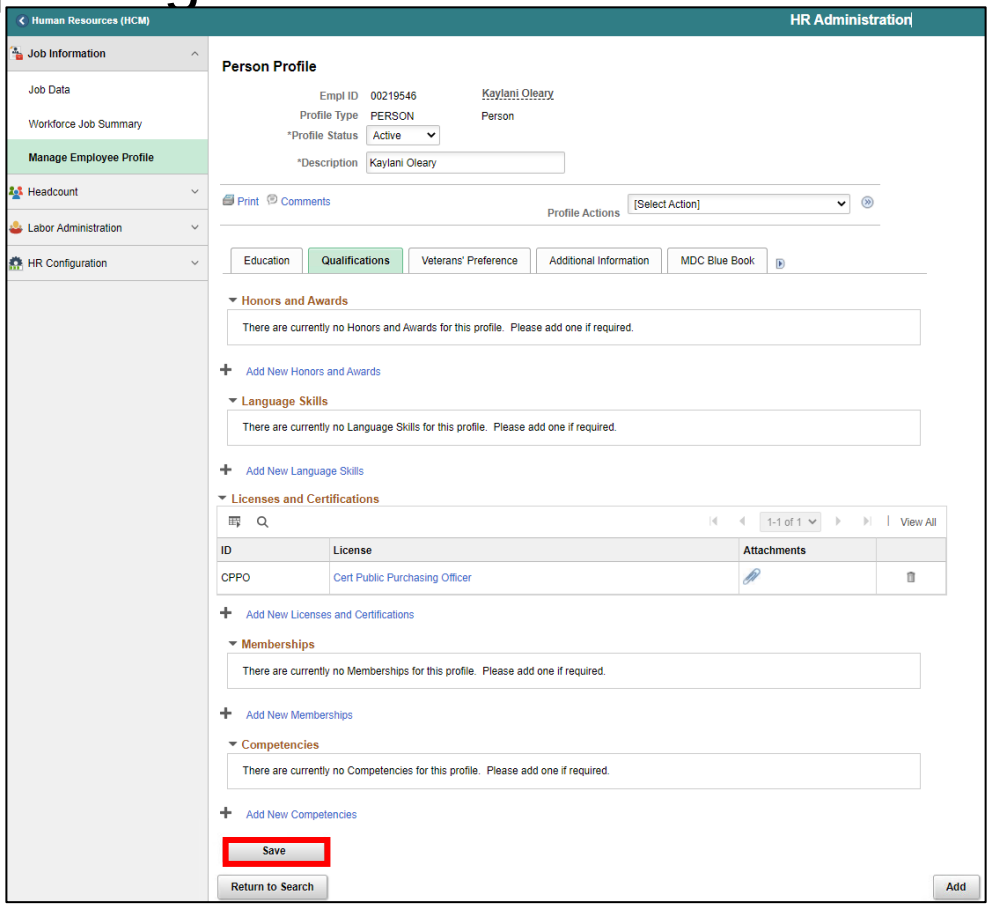
Lecture 4: Pay Components (License/ Certifications) Cont'd

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



Lecture 4: Pay Components (License/ Certifications) Cont'd

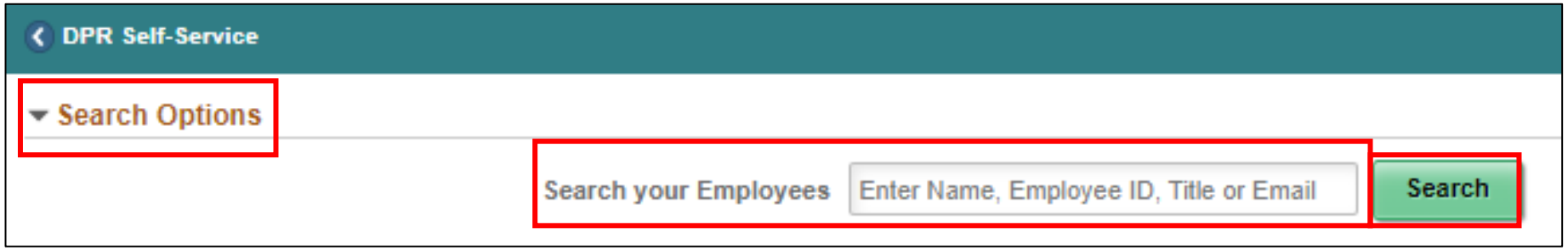
21. Once all supporting documentations are enclosed, select **Save.**



Lecture 4: Pay Components (License/ Certifications) Cont'd

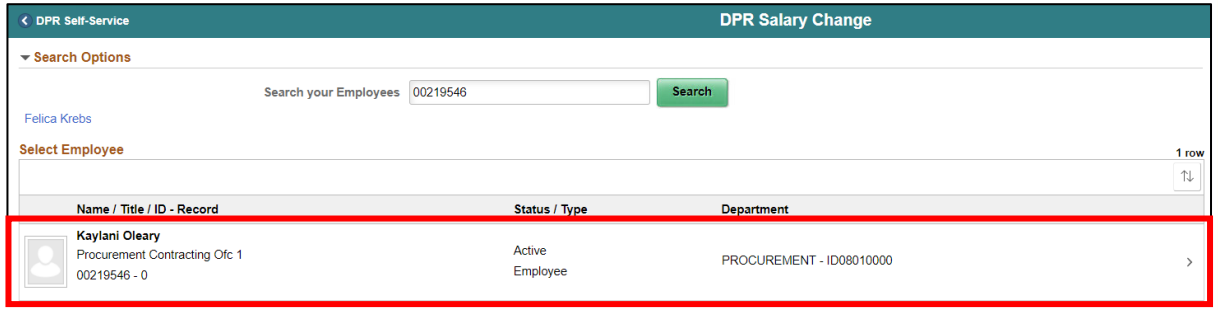
Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

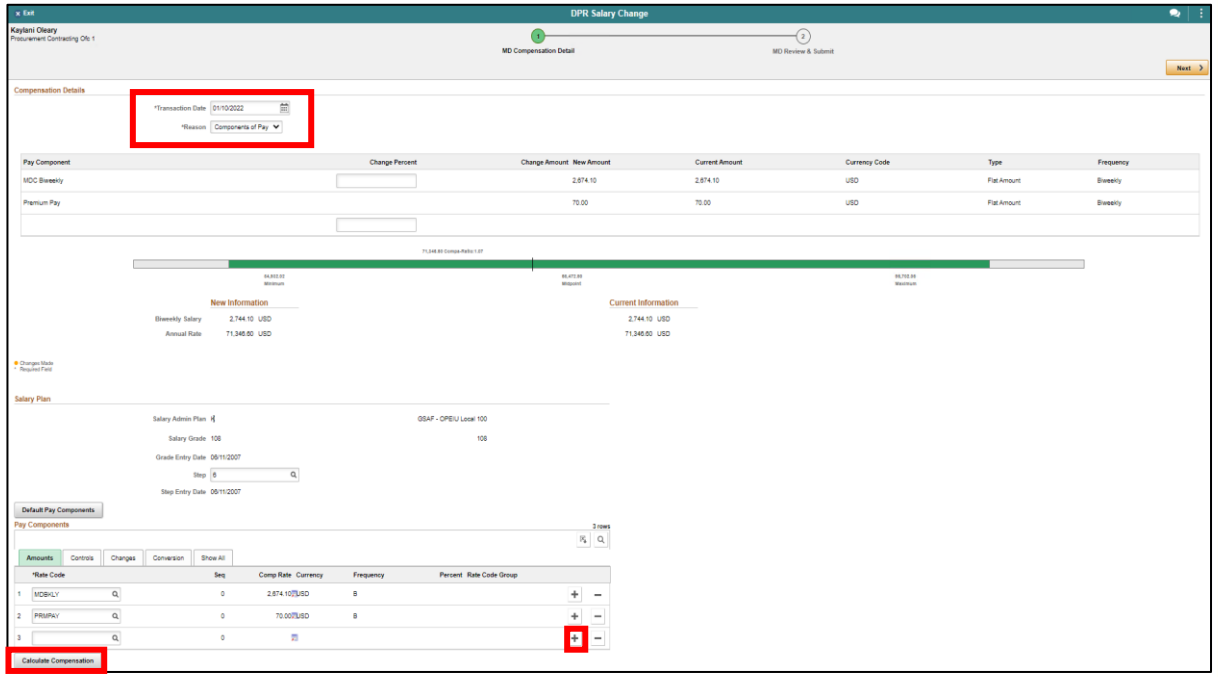
1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees,** field enter **Employee ID, Employee Name, or Classification.**
3. Select **Search.**



Lecture 4: Pay Components (License/ Certifications) Cont'd

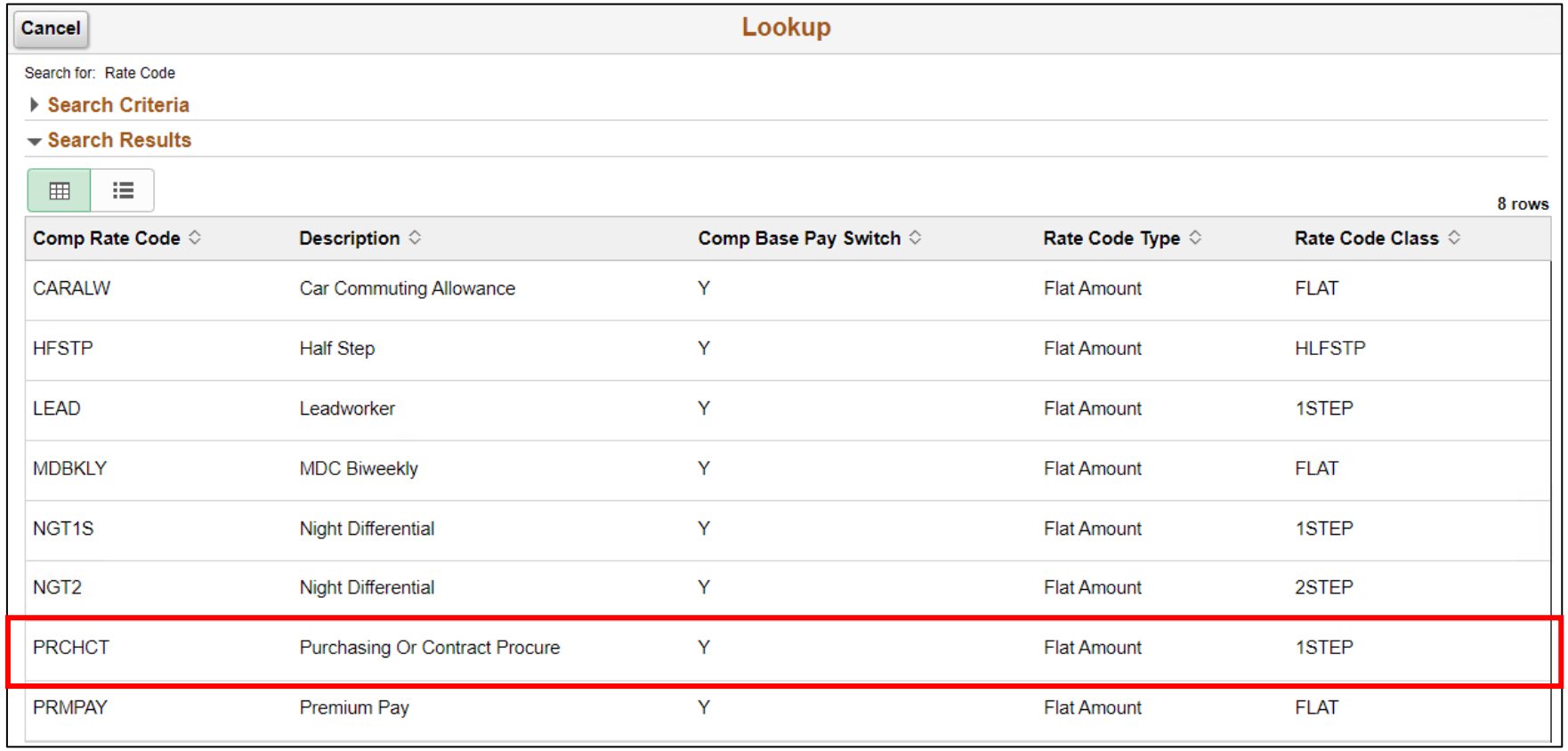
5. Select Employee Record
6. In the ***Transaction Date** field, enter the **effective date of the transaction which is the first day of the beginning of pay period after employee's certification issued date.**
   - **NOTE:** The effective date for Licenses/Certifications is the first of the beginning of the pay period after the employee's certification issued date.
6. In the ***Reason** field, select **Components of Pay** for License/Certifications.
7. In the **Pay Components** section, select the **Plus sign (+) to add the *Rate Code for the License/Certification**.
8. A new row will appear, select the **magnifying glass** to select the **License/Certification Rate Code**.





Lecture 4: Pay Components (License/ Certifications) Cont'd

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



Cancel

Lookup

Search for: Rate Code

Search Criteria

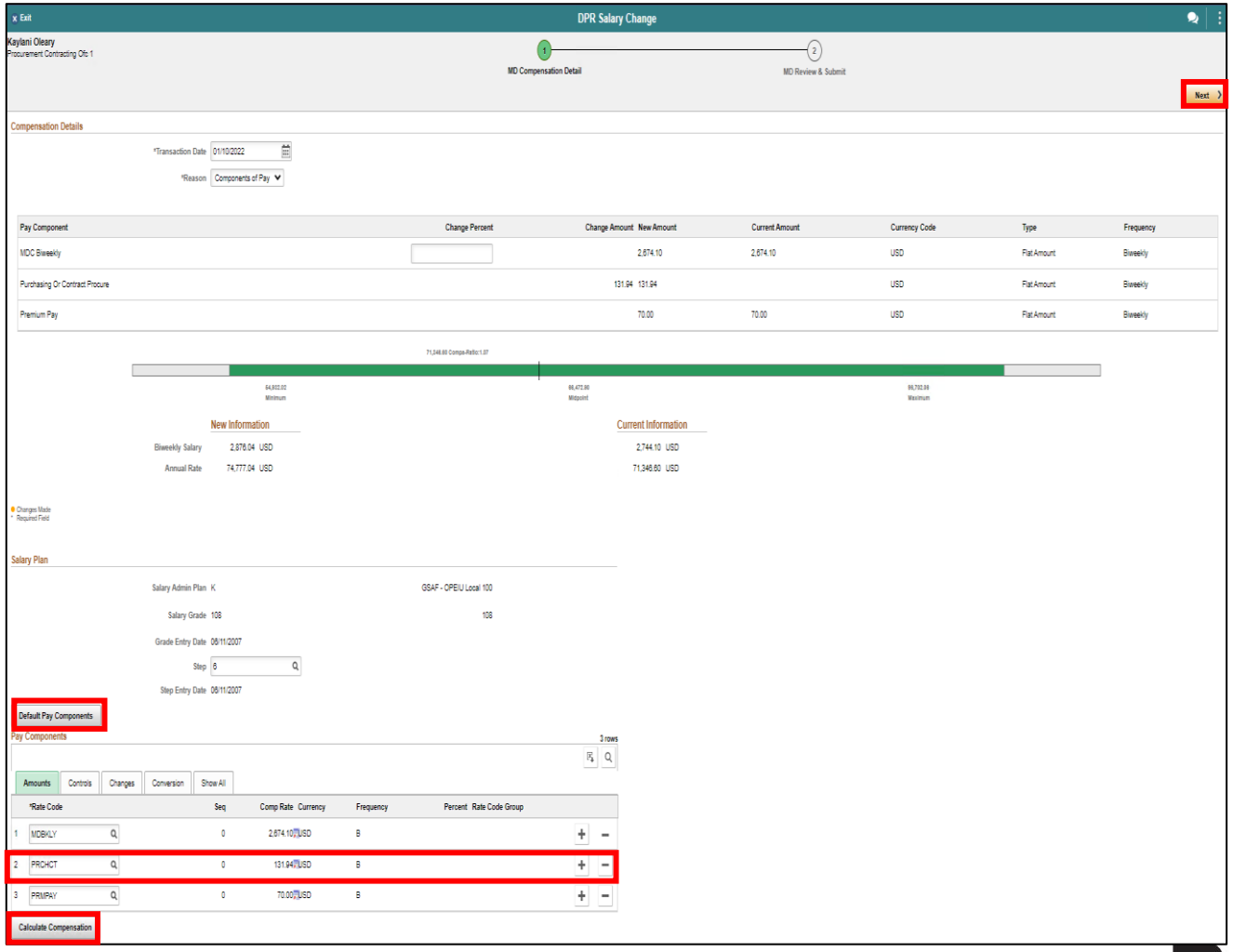
Search Results

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

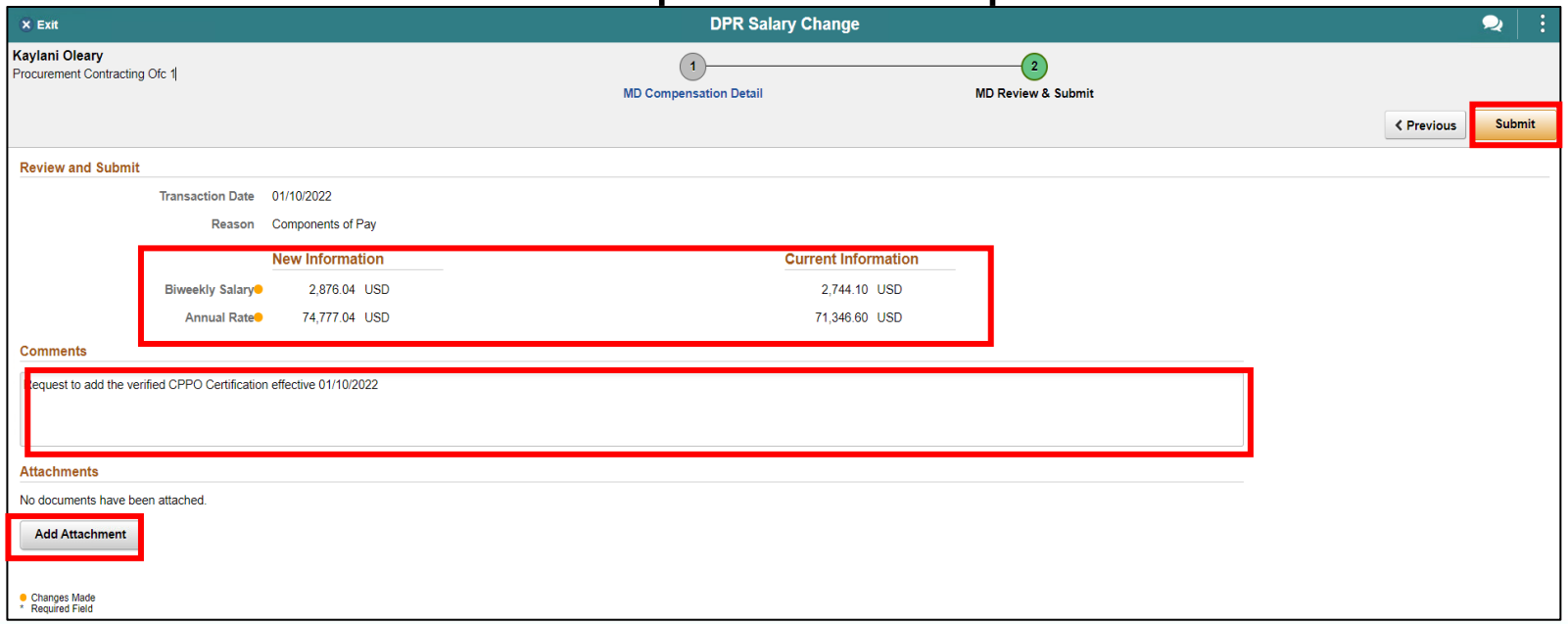
Lecture 4: Pay Components (License/ Certifications) Cont'd

10. Select **Default Pay Components.**
11. Select **Calculate Compensation**.
    - INFORMS has now properly calculated the employee's new Biweekly Salary.
12. Select **Next**.



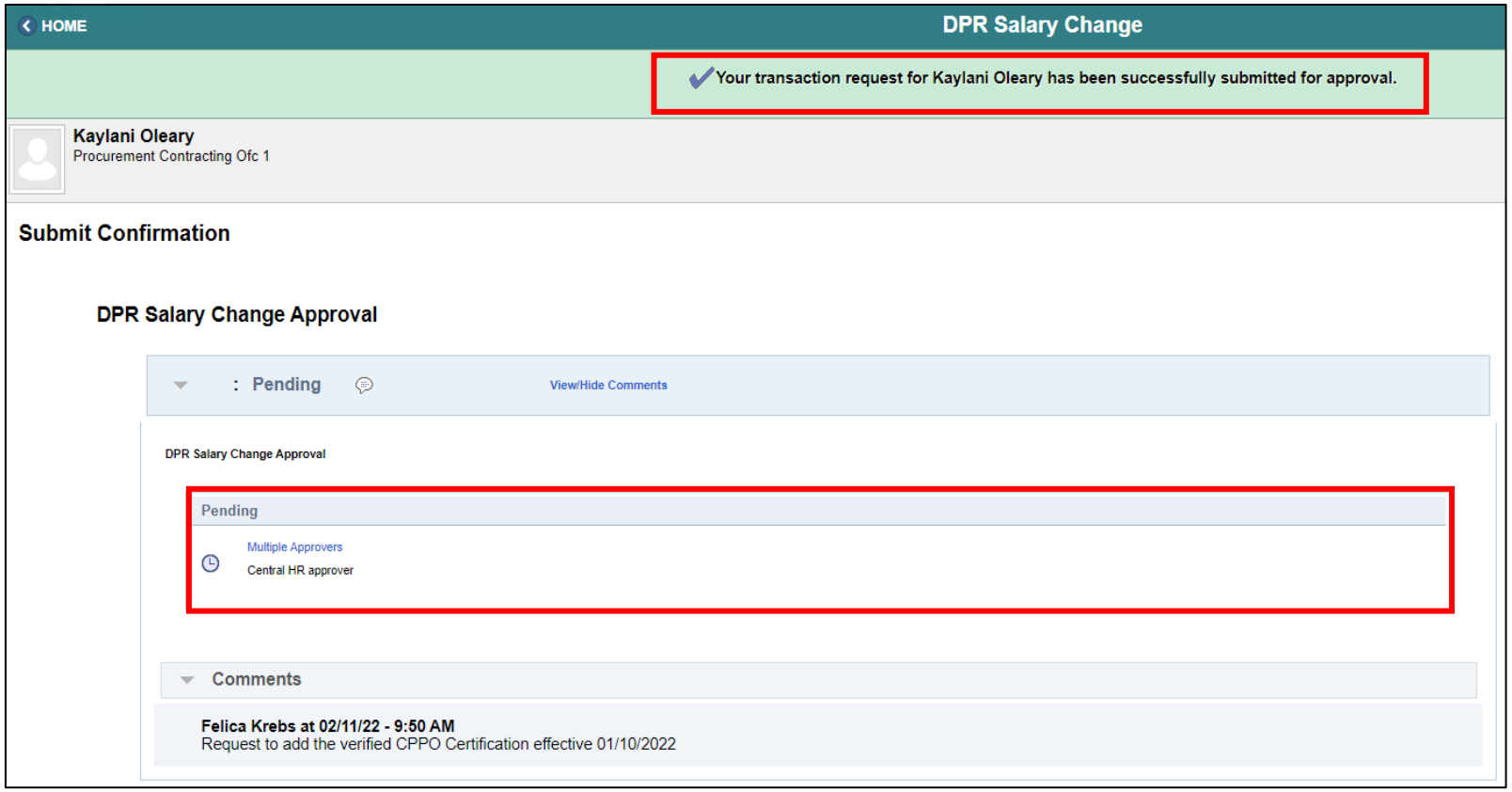
Lecture 4: Pay Components (License/ Certifications) Cont'd

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**.



Lecture 4: Pay Components (License/ Certifications) Cont'd

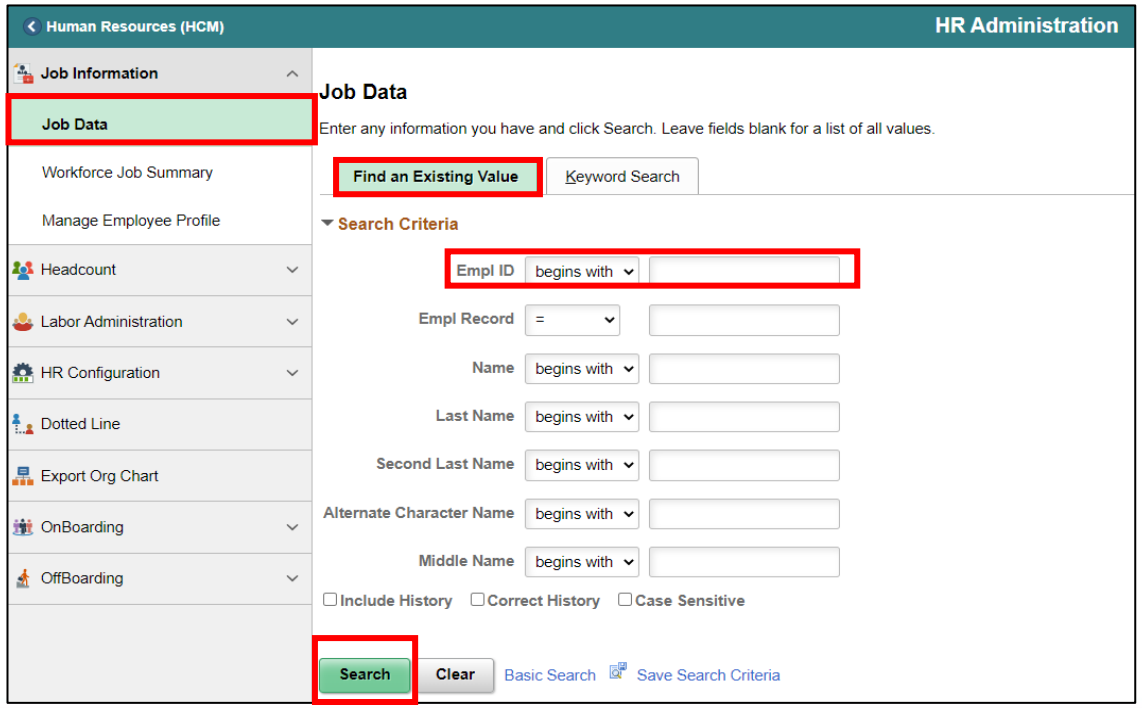
- The License/Certification Salary request has been successfully submitted pending the approval of Central HR.



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

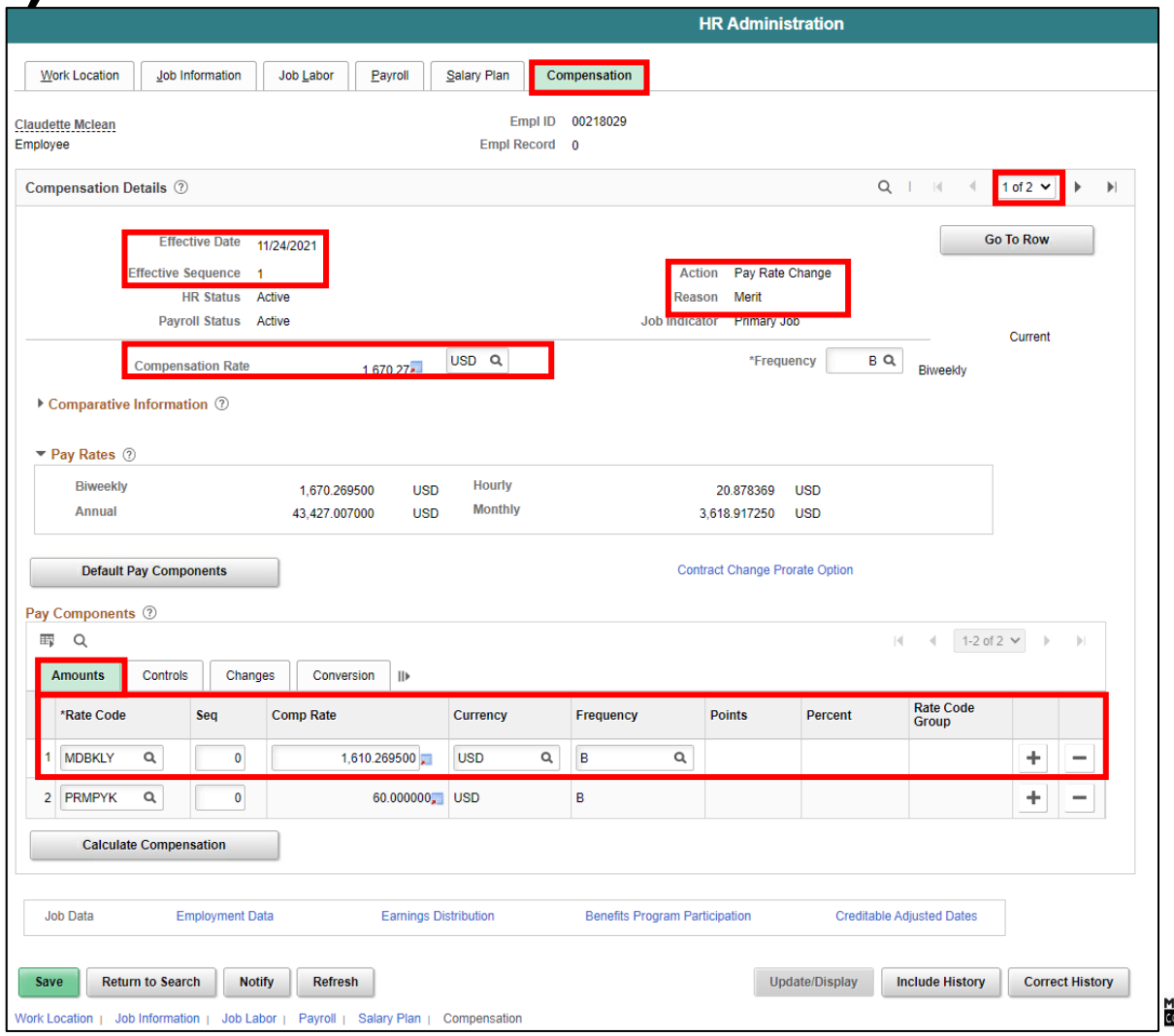
Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

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



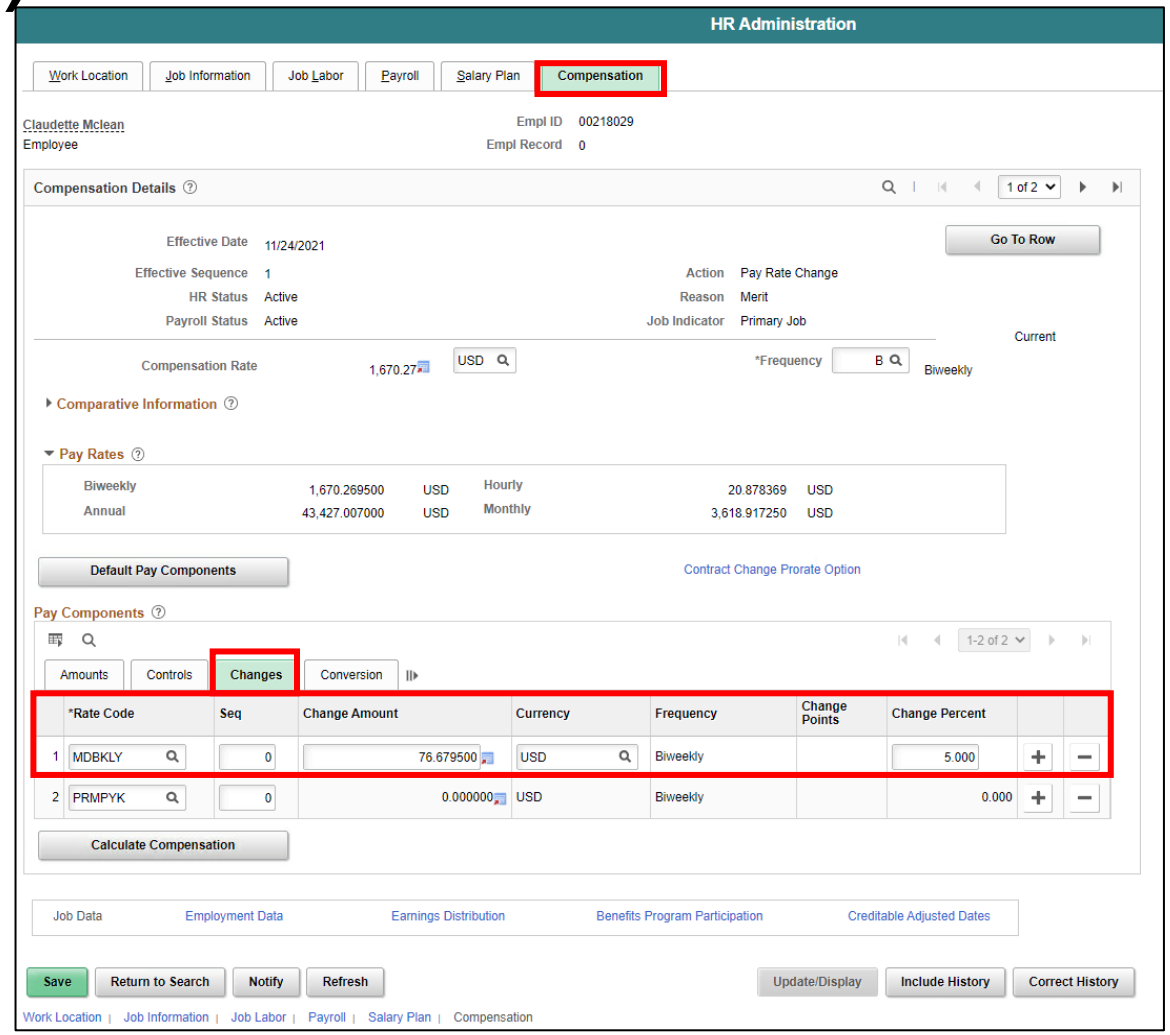
Lecture 5: Review Salary Change via Job Data (Salary Grade) Cont'd

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.



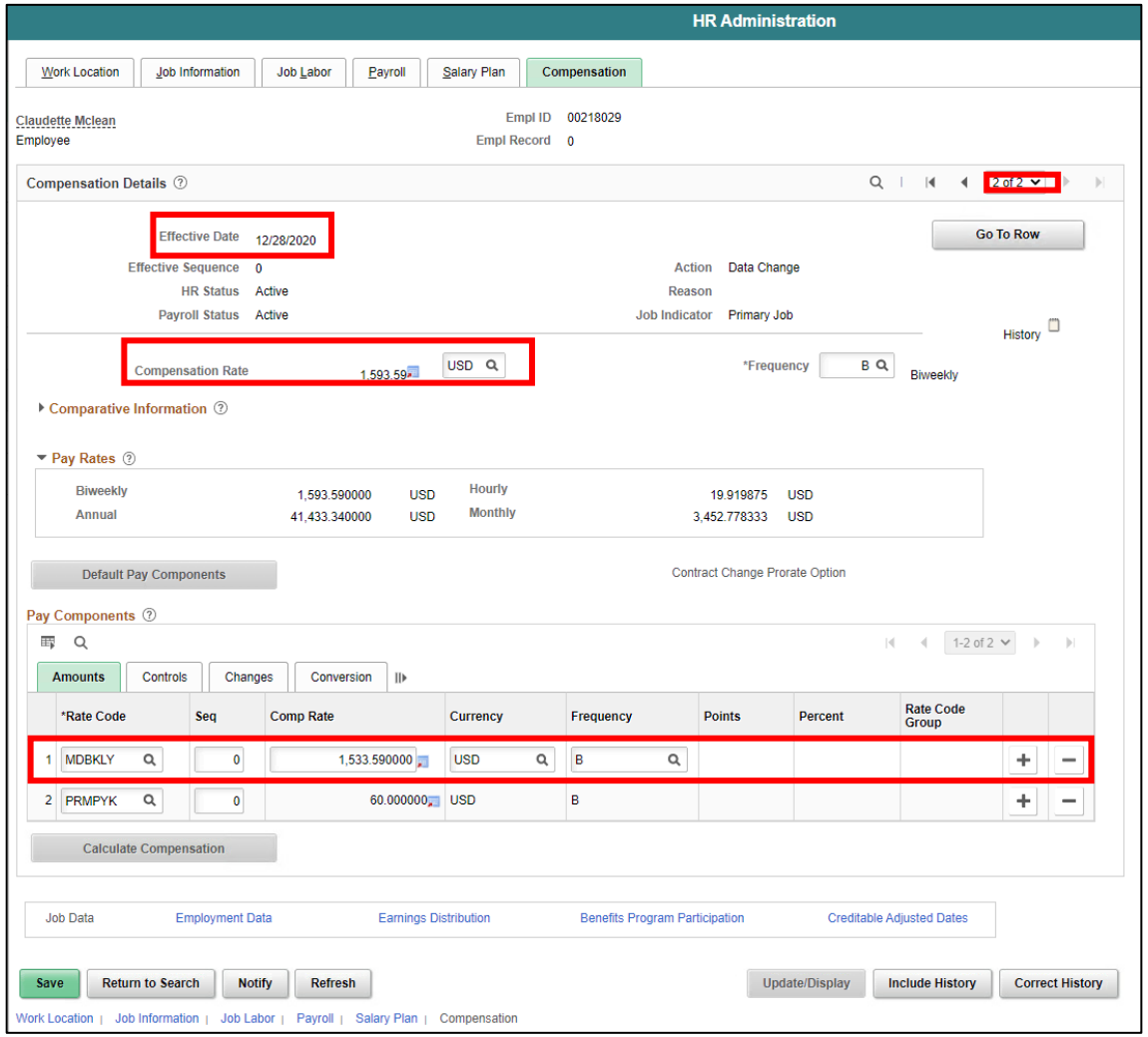
Lecture 5: Review Salary Change via Job Data (Salary Grade) Cont'd

6. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.
   - Notice the **MDBKLY Change Amount** and the **Change Percent**.



Lecture 5: Review Salary Change via Job Data (Salary Grade) Cont'd

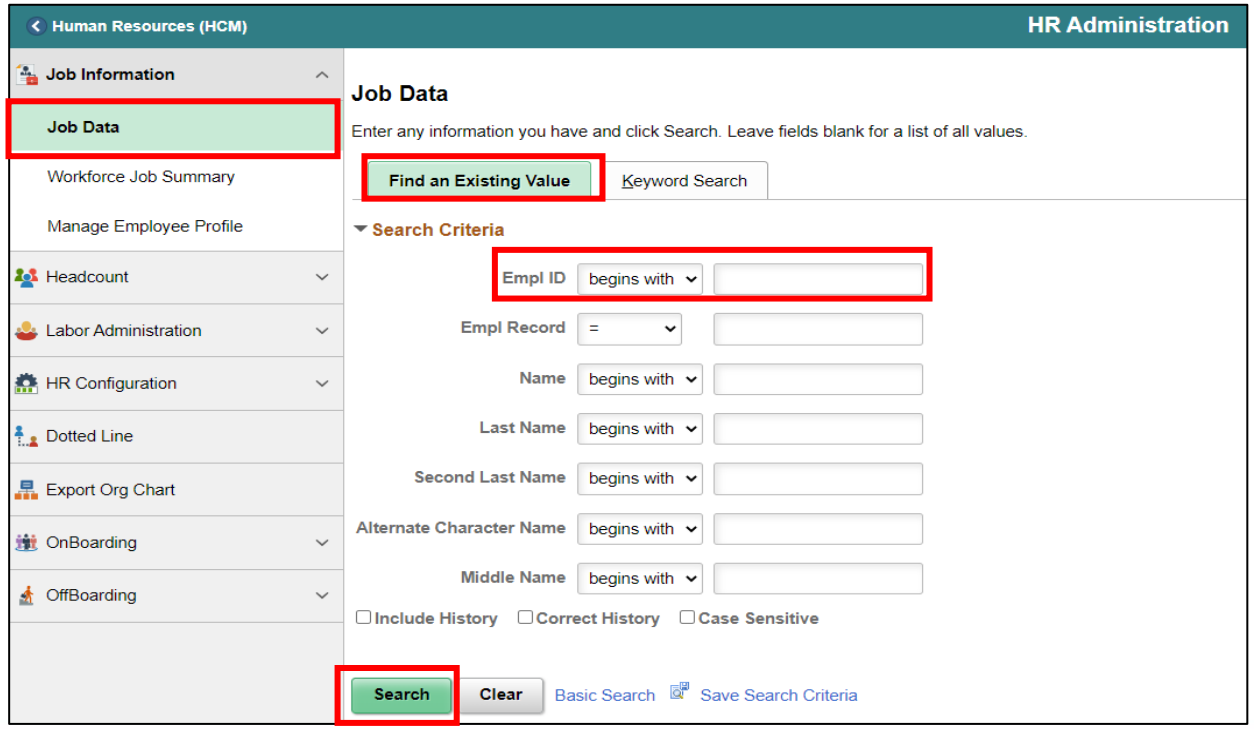
- Listed is the initial record of the employee
  - Notice the displayed record **2 of 2, Effective Date,** and the previous **Compensation Rate** and ***Rate Code** before the merit increase.



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

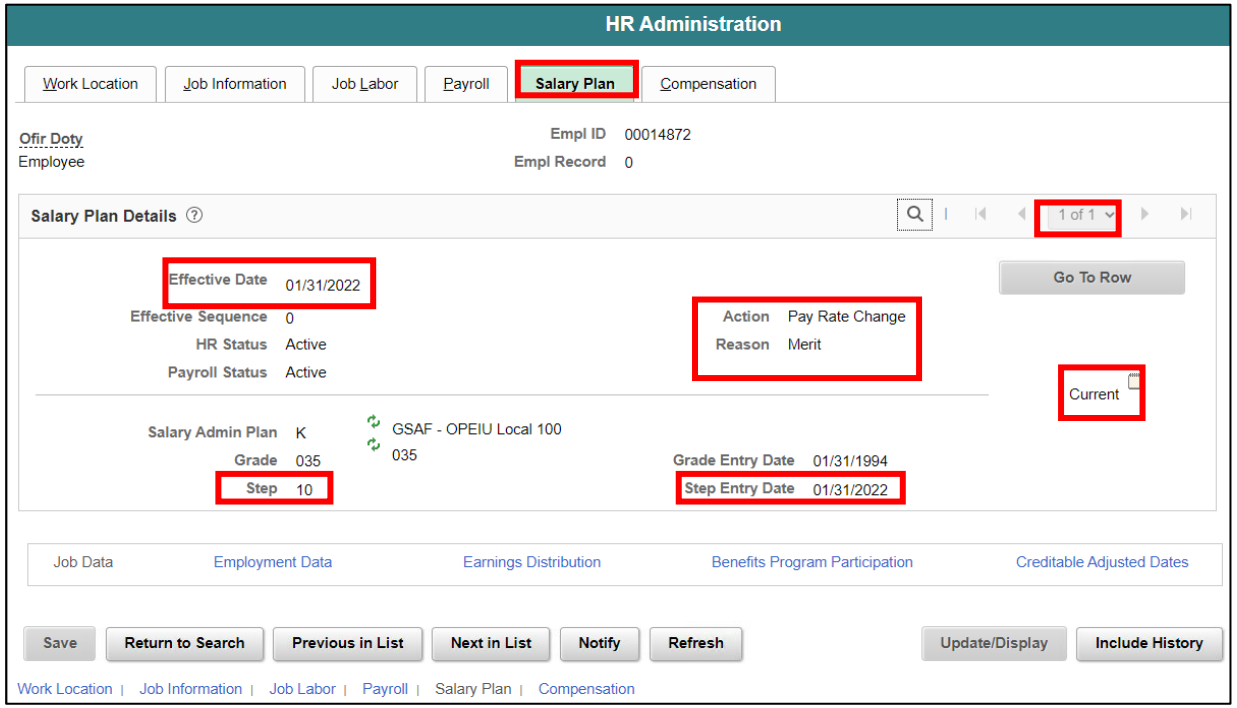
Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

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



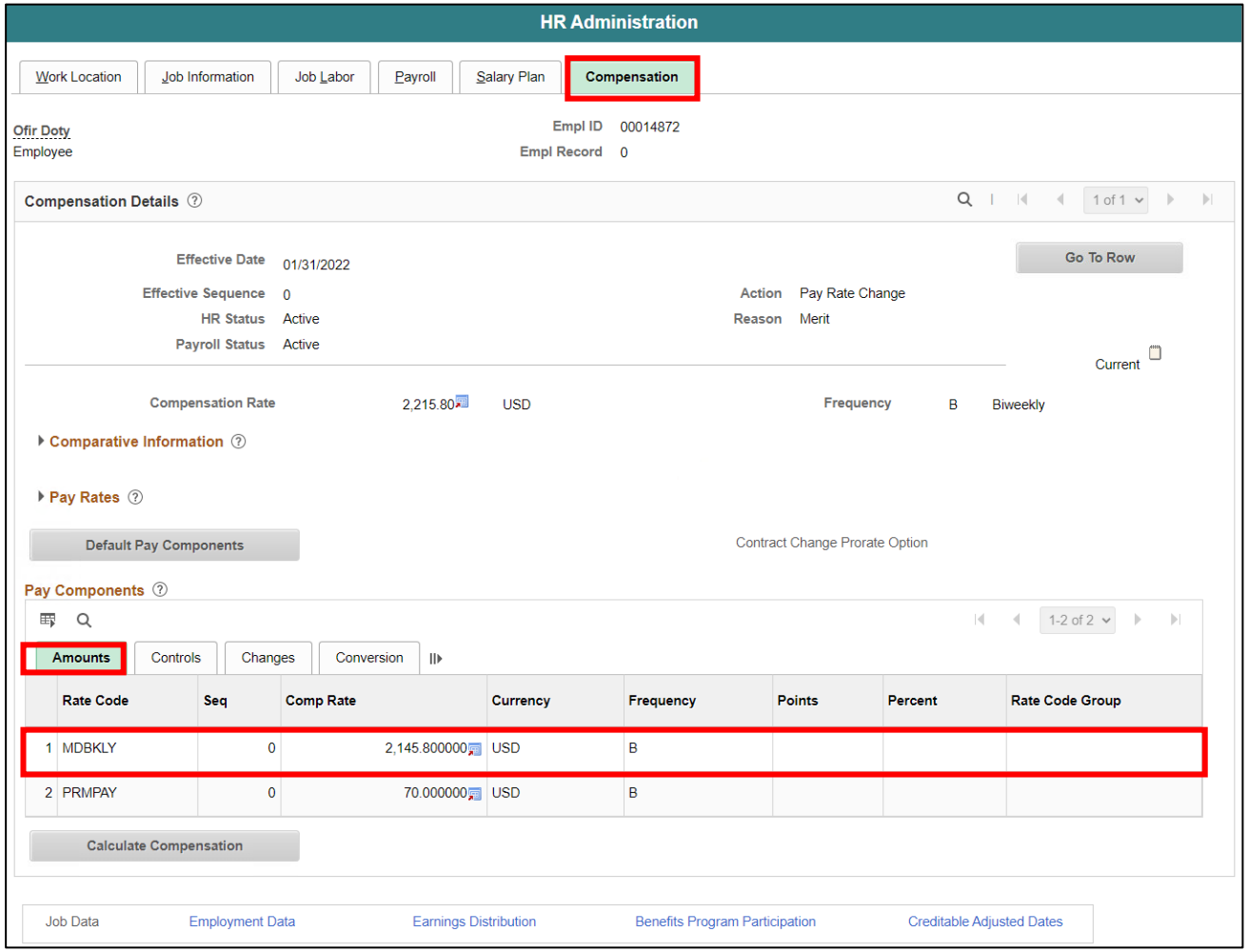
Lecture 5: Review Salary Change via Job Data (Salary Step) Cont'd

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.**



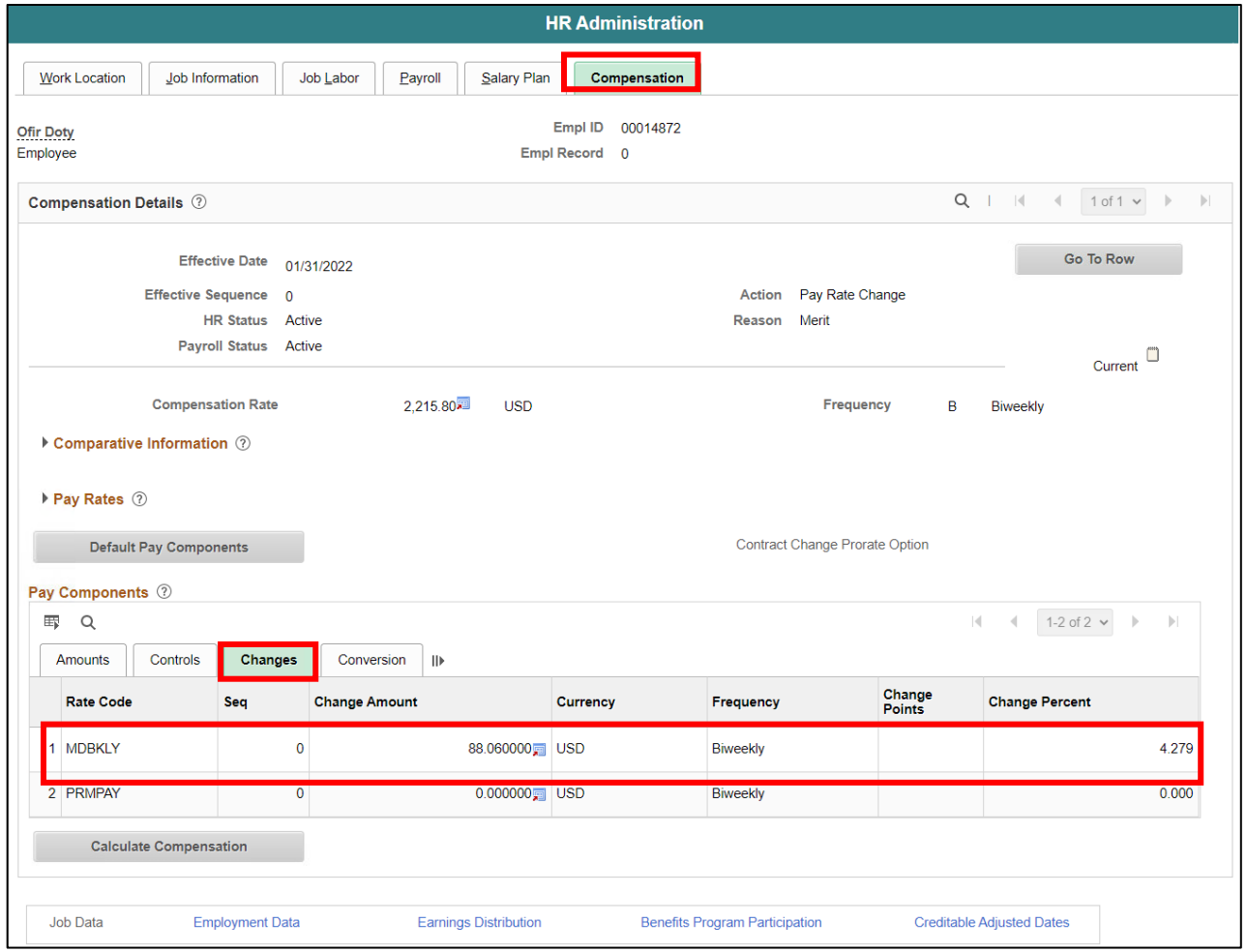
Lecture 5: Review Salary Change via Job Data (Salary Step) Cont'd

5. Select the **Compensation** tab
6. Within the **Pay Components** section, select the **Amounts** tab
   - Notice the **Comp Rate** with the new Merit Increase.



Lecture 5: Review Salary Change via Job Data (Salary Step) Cont'd

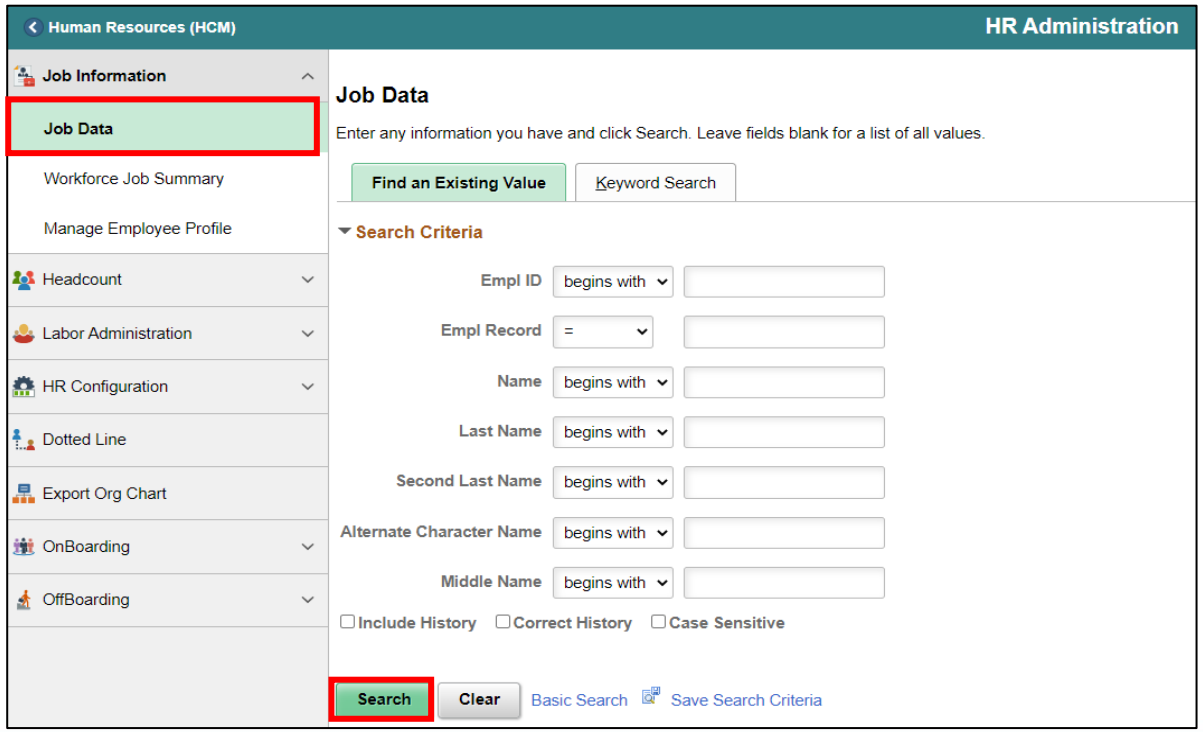
7. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.
   - Notice the **MDBKLY Change Amount** and the **Change Percent**.



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

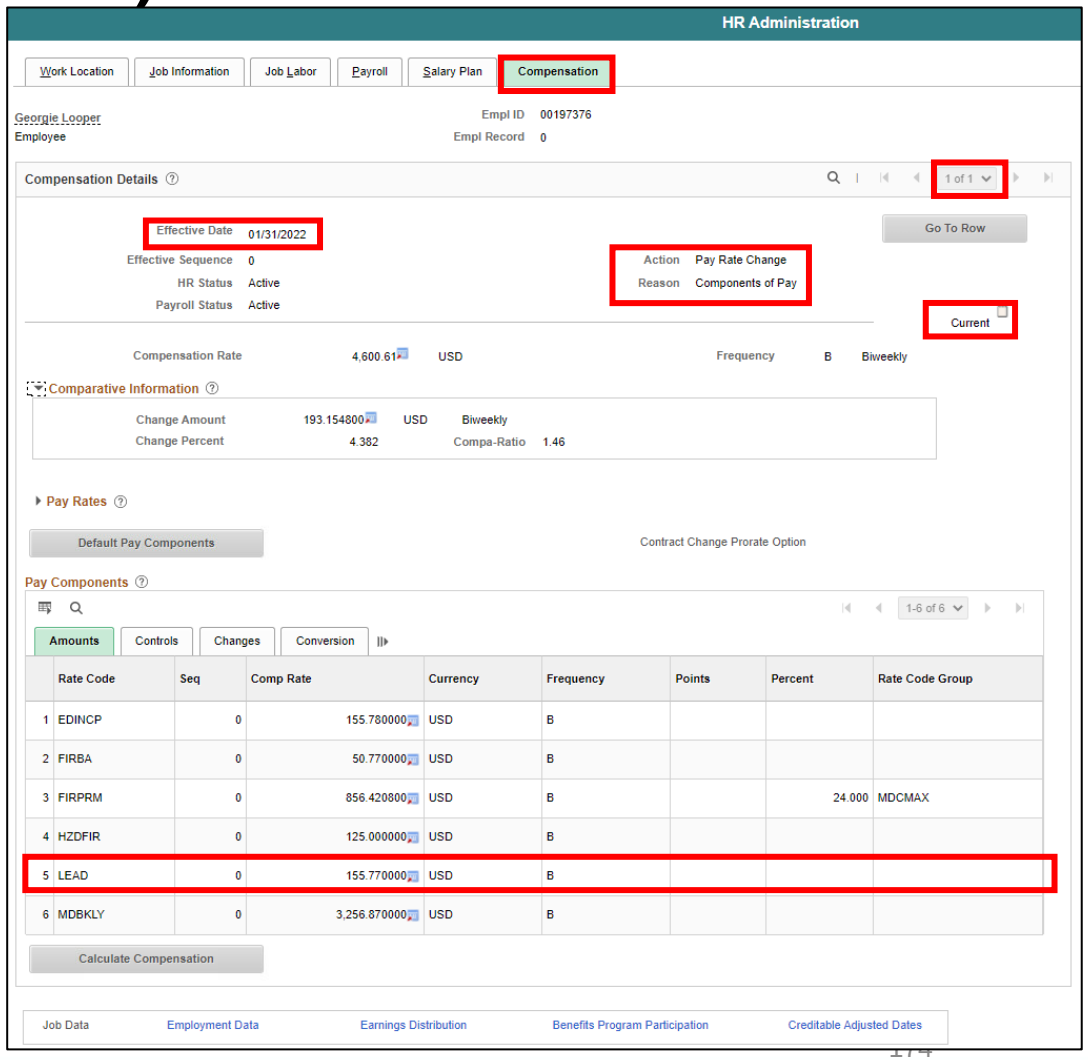
Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

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



Lecture 5: Review Salary Change via Job Data (Pay Components) Cont'd

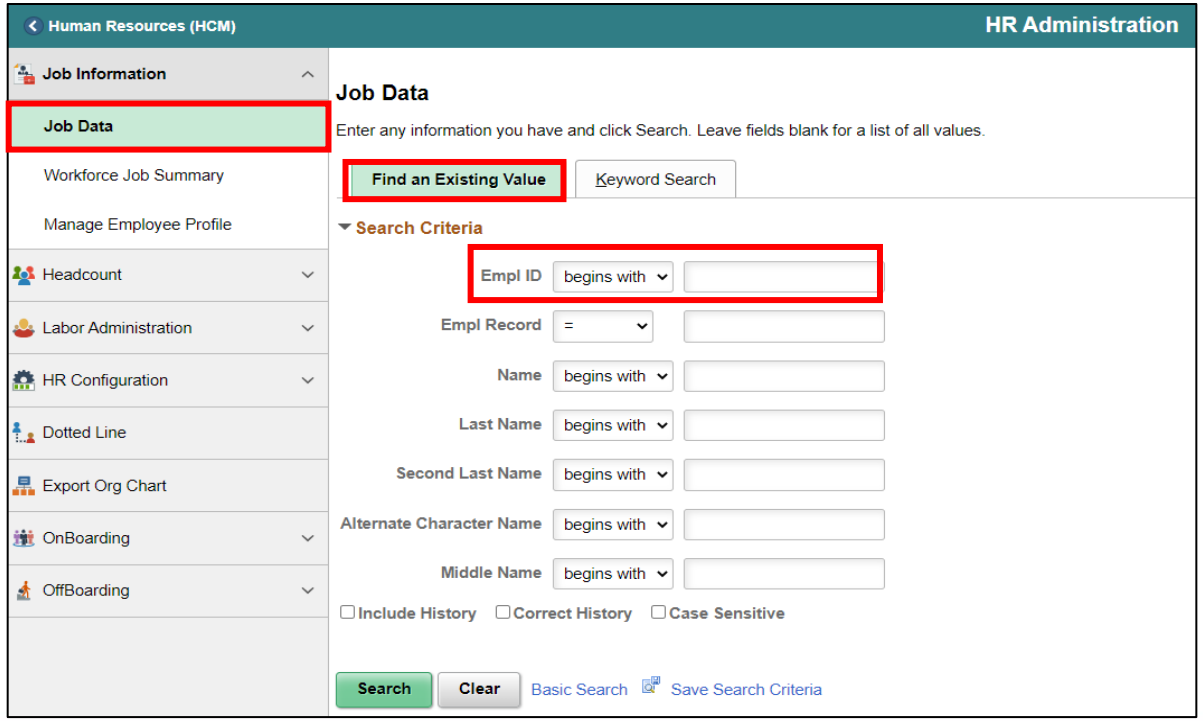
4. Select the **Compensation** tab.
   - Notice the **Current** record **1 of 1**, the **Effective Date**, **Action,** and **Reason**. In the **Pay Components** section, the employee's salary change request for the Leadworker (LEAD) pay component was approved and processed with the effective date of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



Lecture 5: Review Salary Change via Job Data (License & Certification)

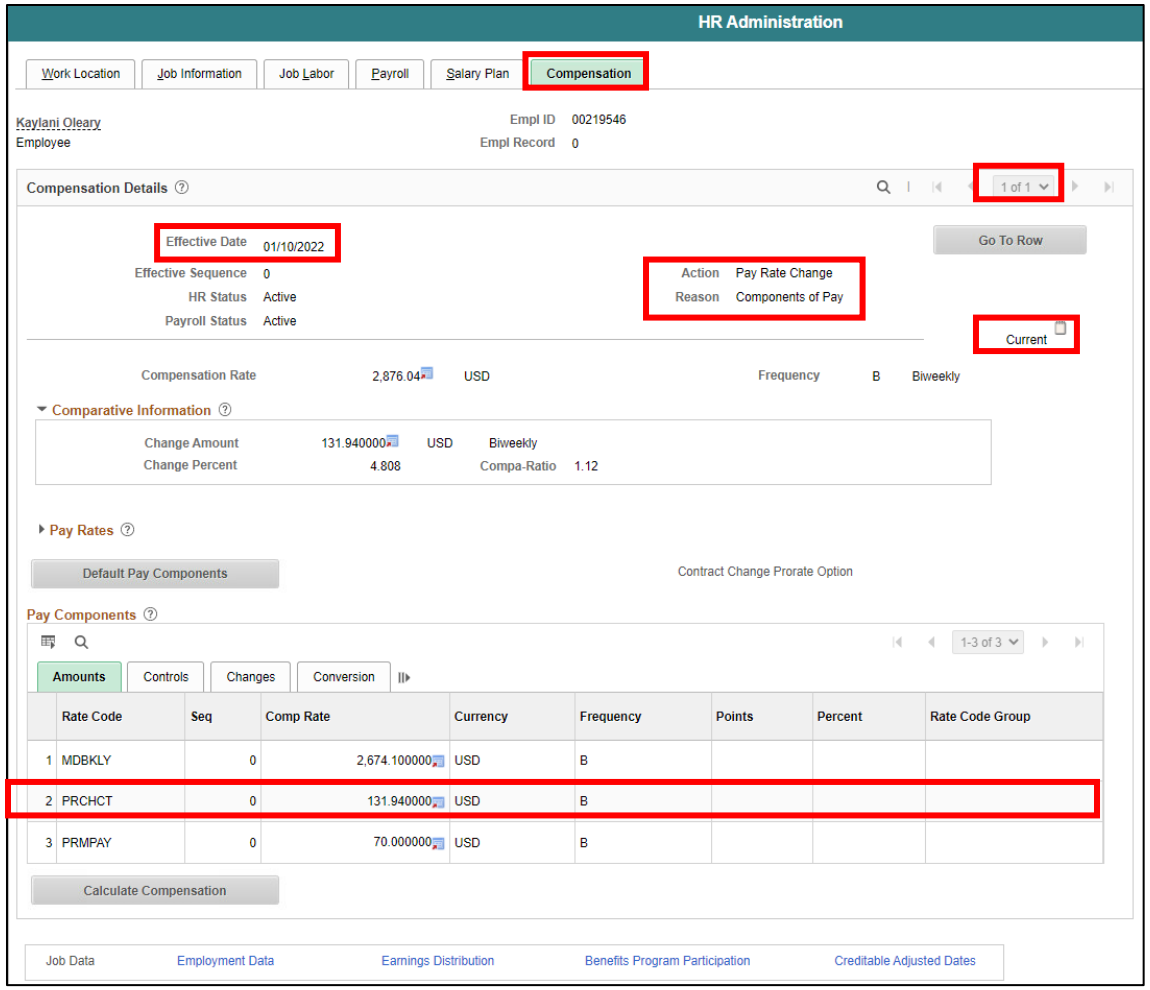
Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

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

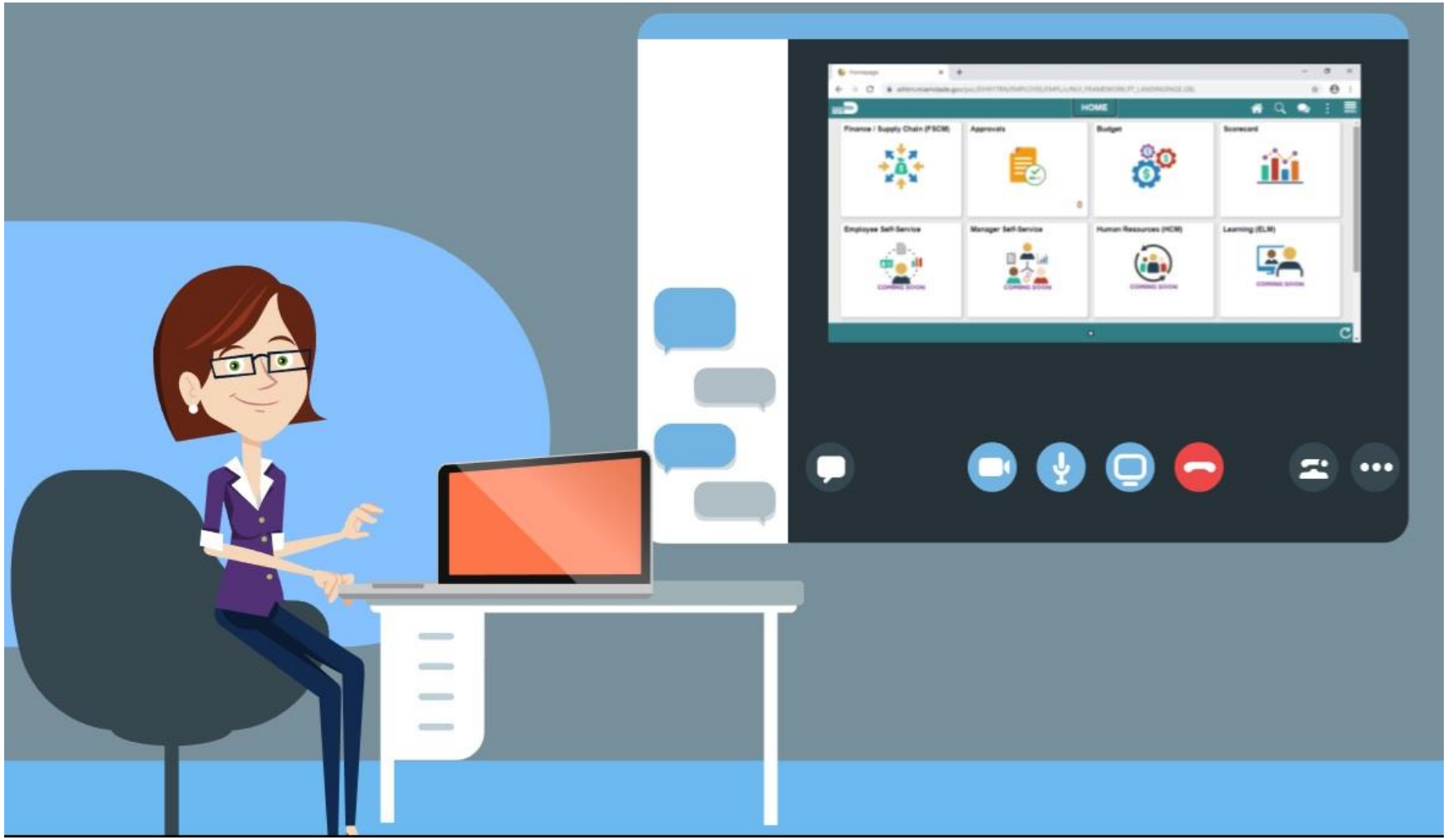


Lecture 5: Review Salary Change via Job Data (License & Certification) Cont'd

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.**



Lesson 6: Activities and Exercises



Lesson 6: 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

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

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

Lesson 7: Key Terms

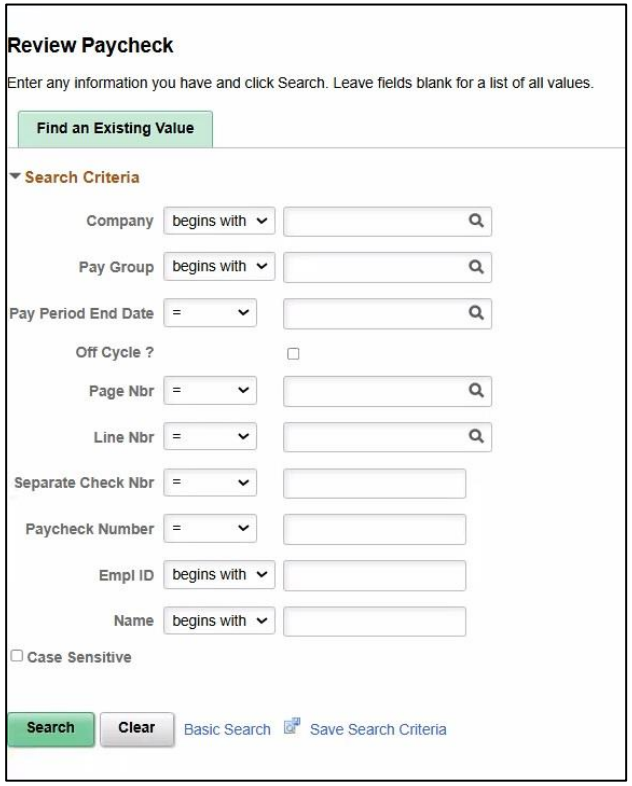
Term	Definition
Pay Calendar	Pay calendars used to schedule payroll cycles for pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements such as employee type, pay frequency, same country location, and so on. A pay group consolidates a set of employees within a company for payroll processing.
Pay Run IDs	Pay Run Ids enable payroll processes to be run for each calendar. A pay run id must be created for each “run.” Pay Run Ids must be created and attached to a pay calendar at the beginning of a new year.

Lesson 7: Key Terms

Term	Definition
Earnings Codes	An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.
Deduction Codes	In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. The system uses different deduction rules depending on the type of deduction being set up.

Lecture 1: Payroll

Navigate to: **Main Menu > Navigator > Human Capital Management > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck**



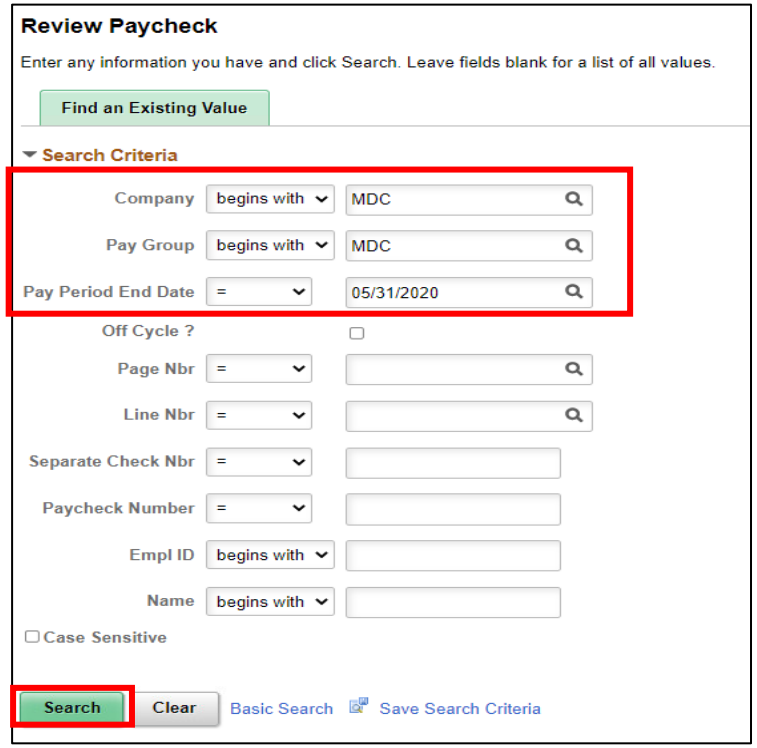
Lecture 1: Payroll Continued

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

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

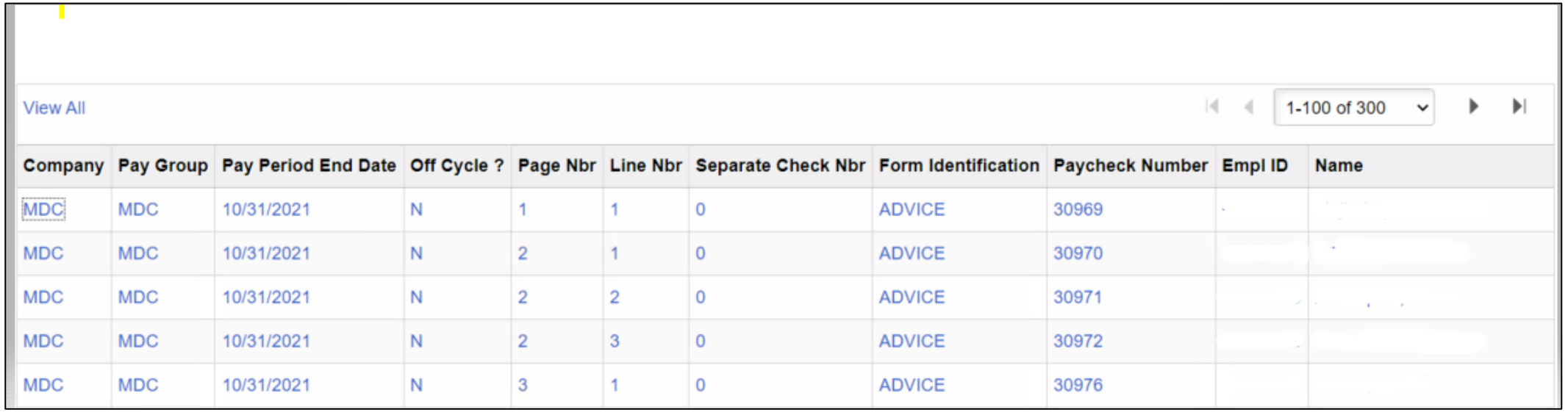
Lecture 1: Payroll Continued

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**



Lecture 1: Payroll Continued

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

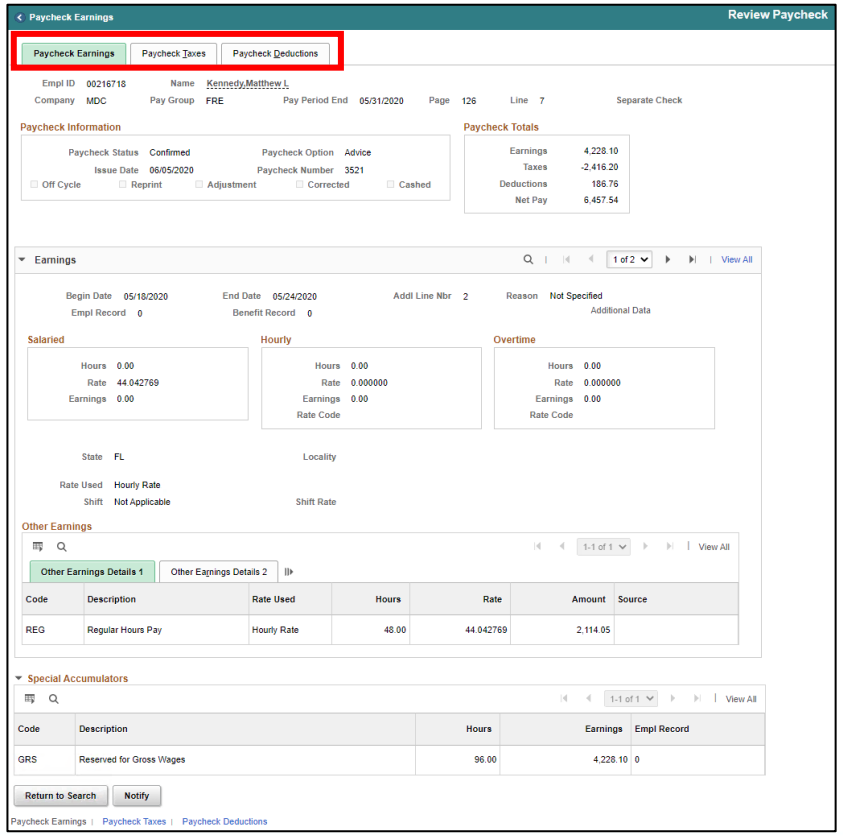


View All 1-100 of 300

Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
MDC	MDC	10/31/2021	N	1	1	0	ADVICE	30969		
MDC	MDC	10/31/2021	N	2	1	0	ADVICE	30970		
MDC	MDC	10/31/2021	N	2	2	0	ADVICE	30971		
MDC	MDC	10/31/2021	N	2	3	0	ADVICE	30972		
MDC	MDC	10/31/2021	N	3	1	0	ADVICE	30976		

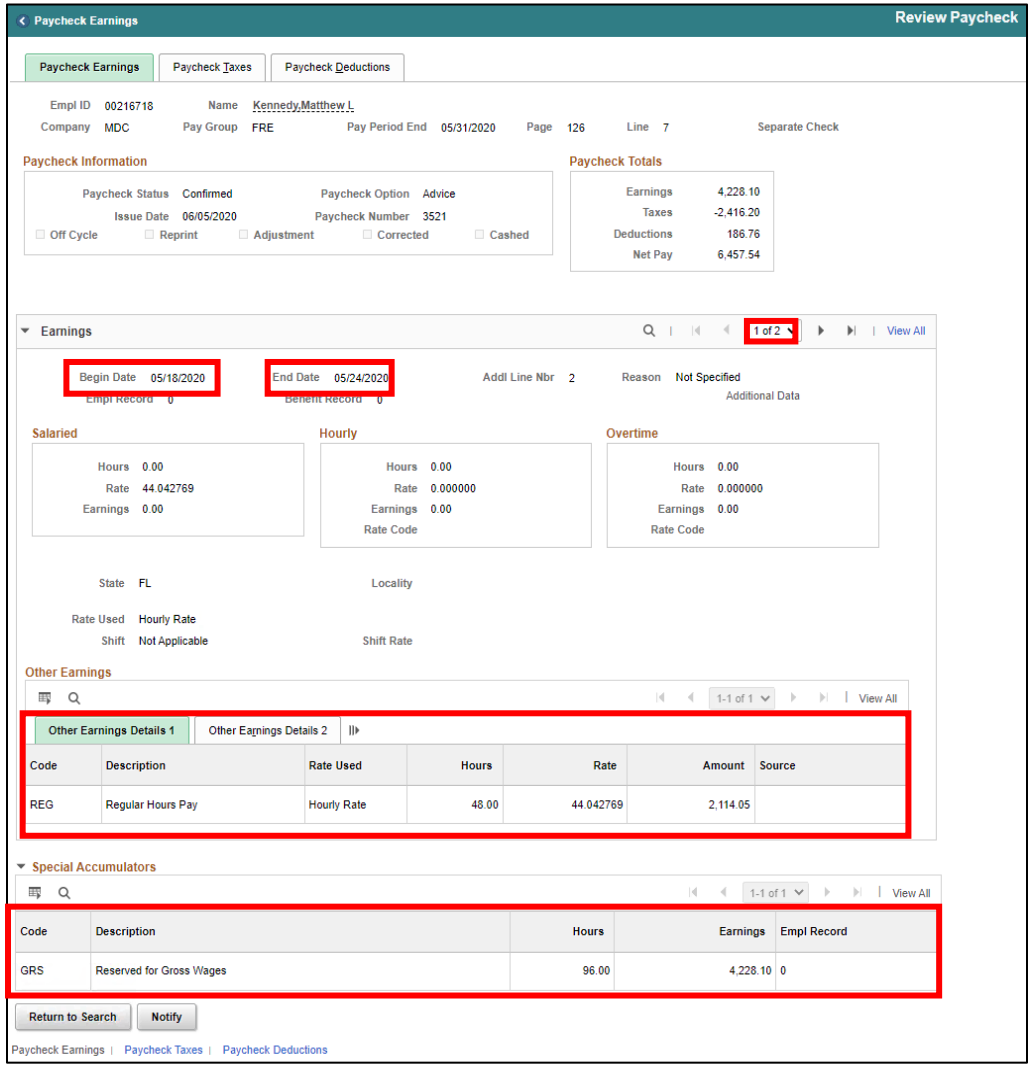
Lecture 1: Payroll Continued

- Multiple tabs within the **Review Paycheck** page display different information: Paycheck Earnings, Paycheck Taxes, Paycheck Deductions



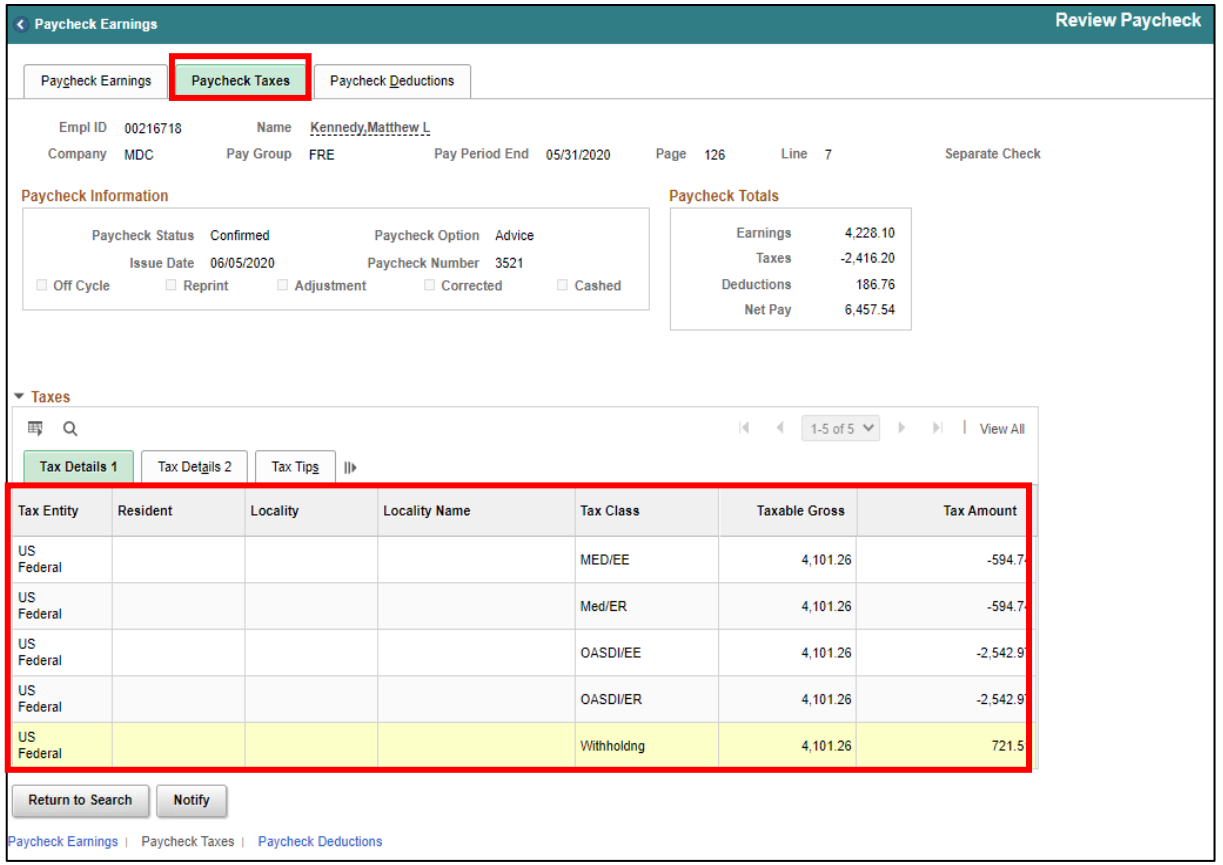
Lecture 1: Payroll Continued

1. In the **Paycheck Earnings** Tab, 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.



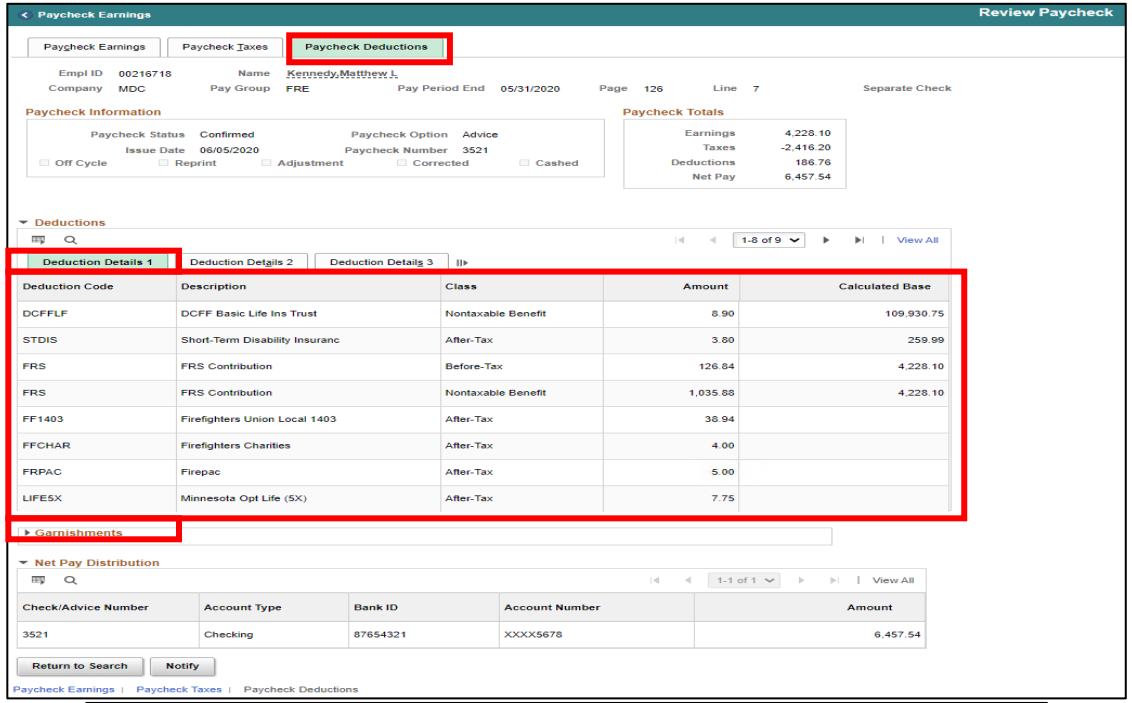
Lecture 1: Payroll Continued

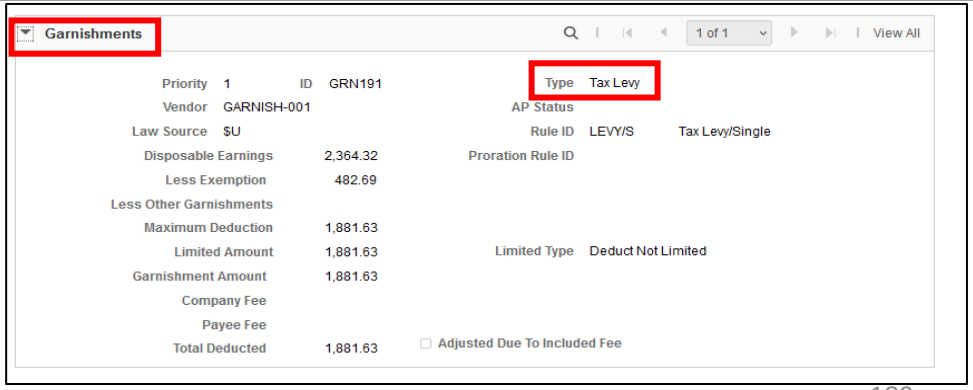
2. Select the **Paycheck Taxes** tab
3. Select **Tax Details 1** tab to see the taxes for the pay period.
   - The Tax Class column lists the different types of taxes withheld:
   - **Federal MED/EE** - Employee paid Medicare tax (MICA)
   - **Federal Med/ER** – Employer-paid Medicare tax (not withheld 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)



Lecture 1: Payroll Continued

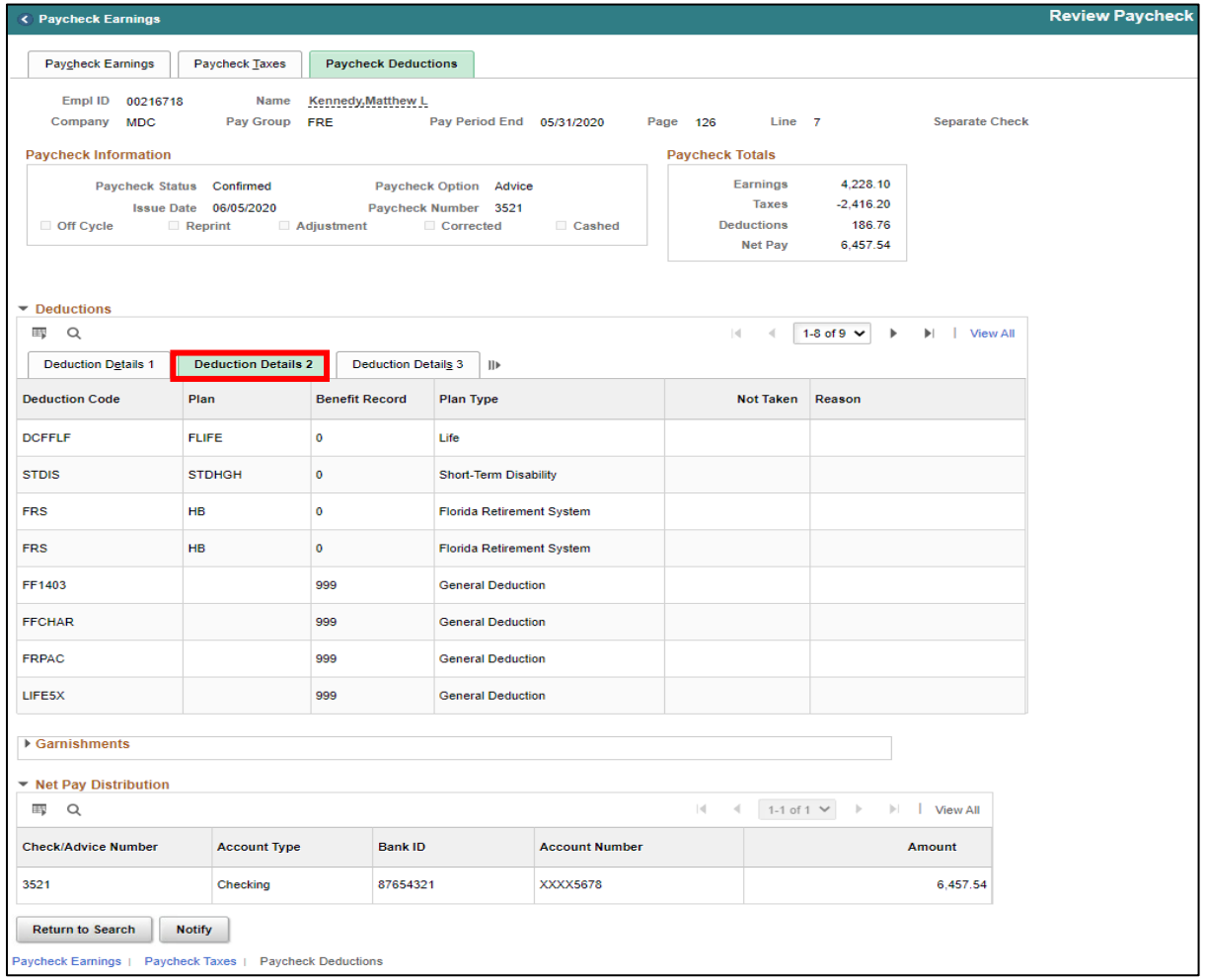
4. Select the **Paycheck Deductions** tab
5. Select the **Deduction Details 1** tab to view the employee's deductions for the pay period.
6. Select the **Garnishment** arrow to view the general deductions.
   - **NOTE: Garnishments** section displays court related deductions such as Child Support.





Lecture 1: Payroll Continued

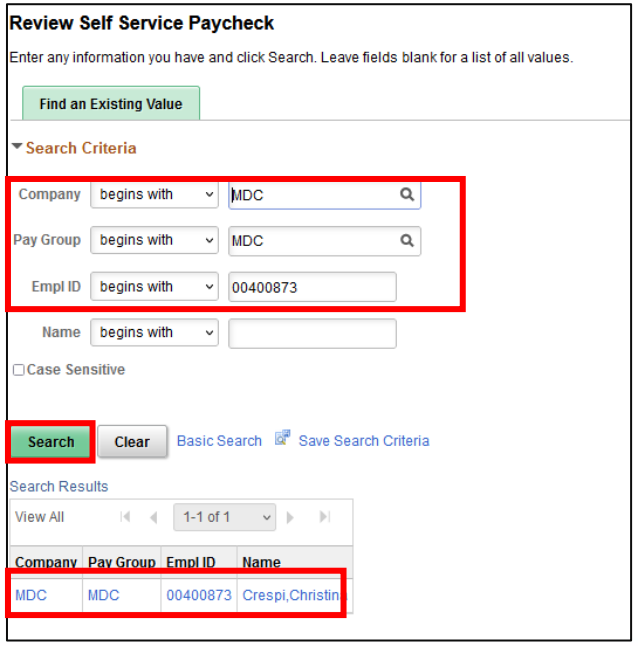
- The Paycheck **Deductions Details 2** tab displays the detailed deductions/contributions such as benefits plan and plan type.
  - **Note:** Constitutional Office employees can receive multiple paychecks and/or W2's if they received retroactive payments from Miami-Dade County or another Constitutional Office.



Lecture 2: Print Paycheck

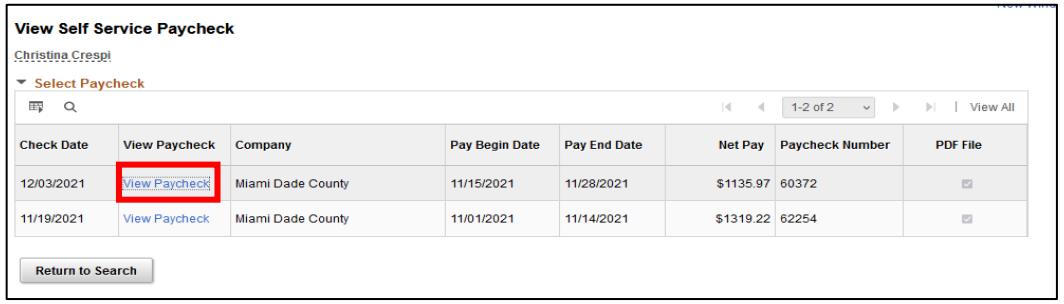
Navigate to Review Self Service Paycheck: **Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck**

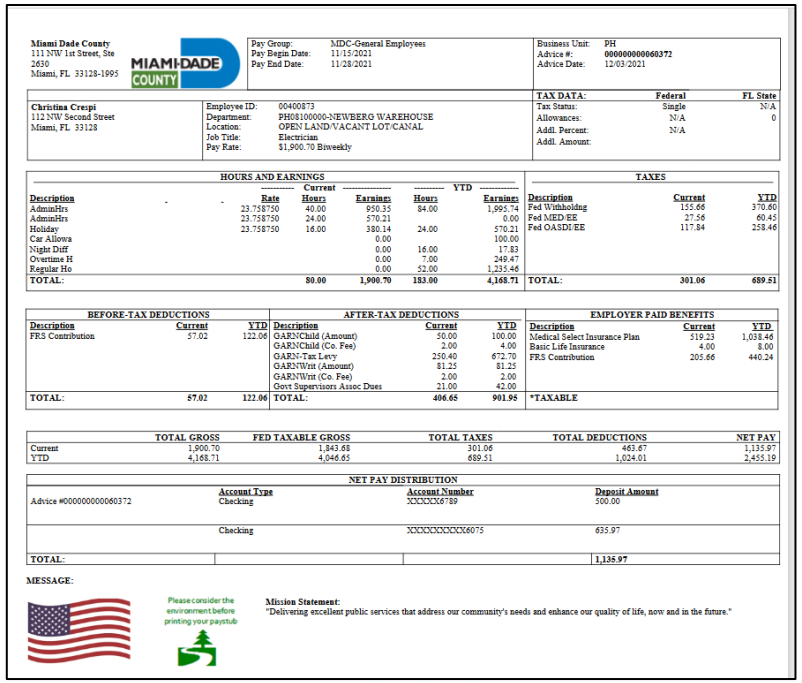
1. Select the **Company**, **Pay Group**, and **Empl ID** and select **Search**.
2. Select the **Employee Record** from the **Search Results**



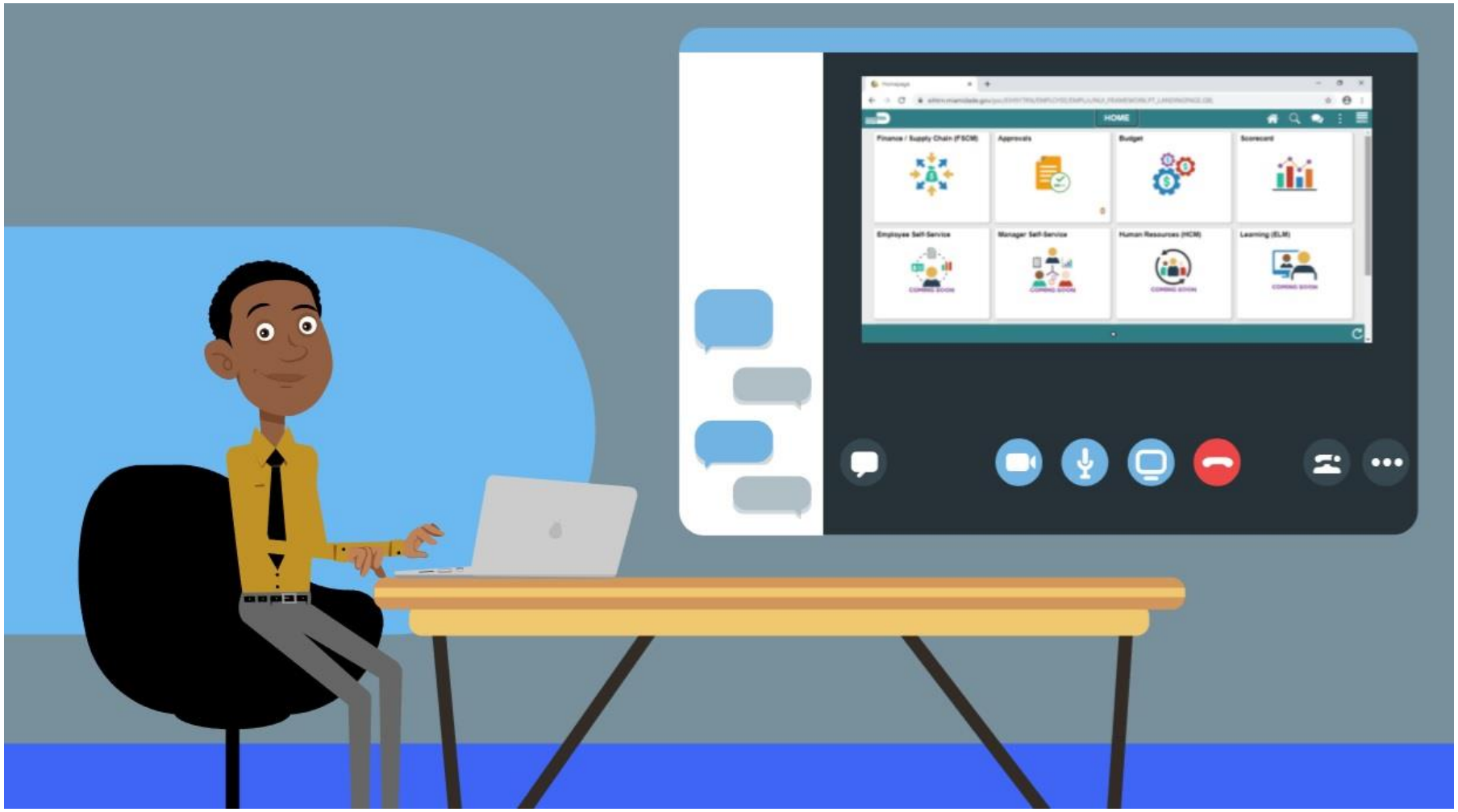
Lecture 2: Print Paycheck Continued

3. Select **View Paycheck** under the **View Self Service Paycheck** section.
4. The employee's paycheck will be available to view. The DPR can print or save the paycheck as a PDF document.





Lesson 7: Activities and Exercises



Lesson 7: Lesson Summary

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

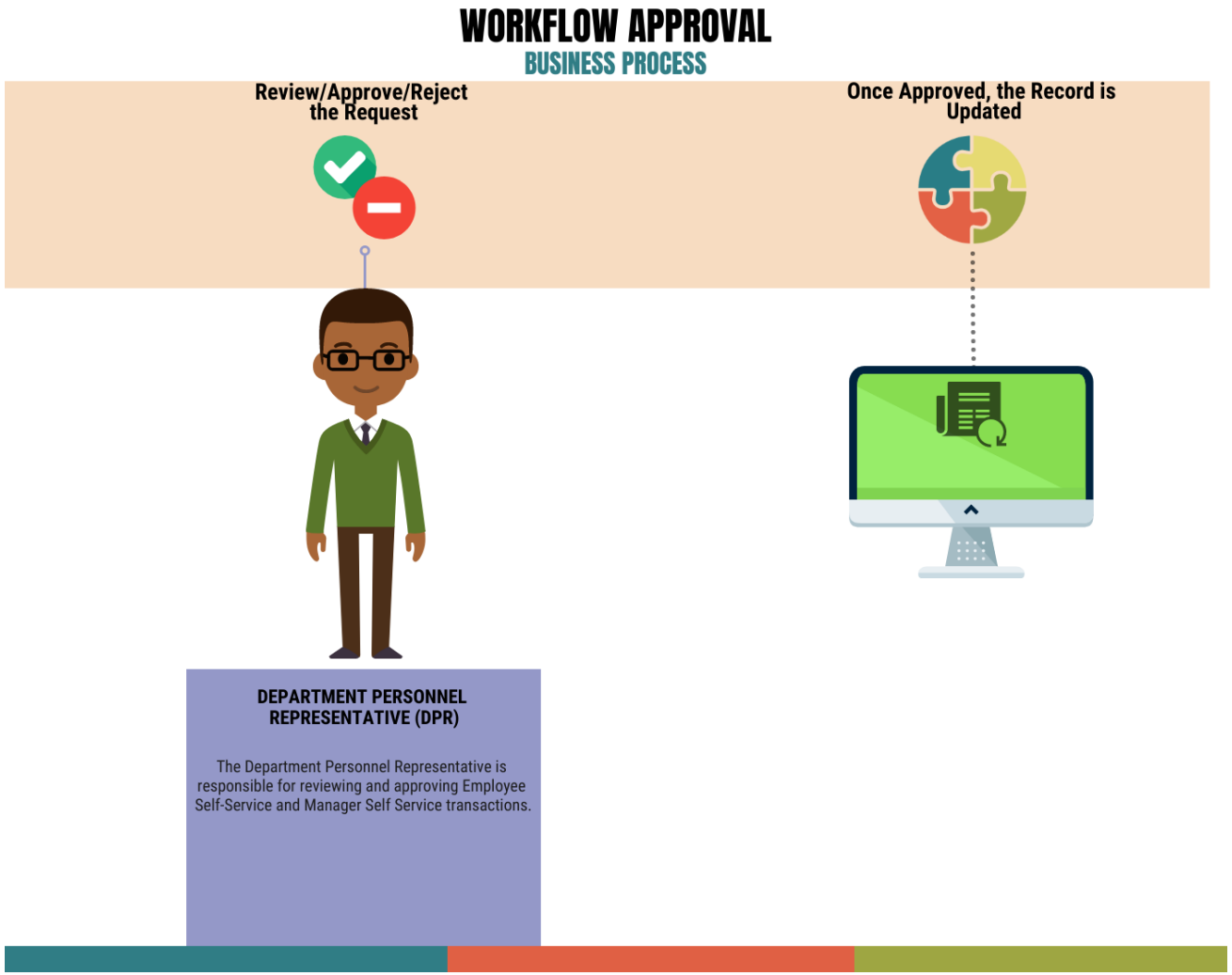
- Review Employee's Paycheck for a specific pay period

Lesson 8: Workflow Approvals

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

- Review and Approve License/Certification Requests

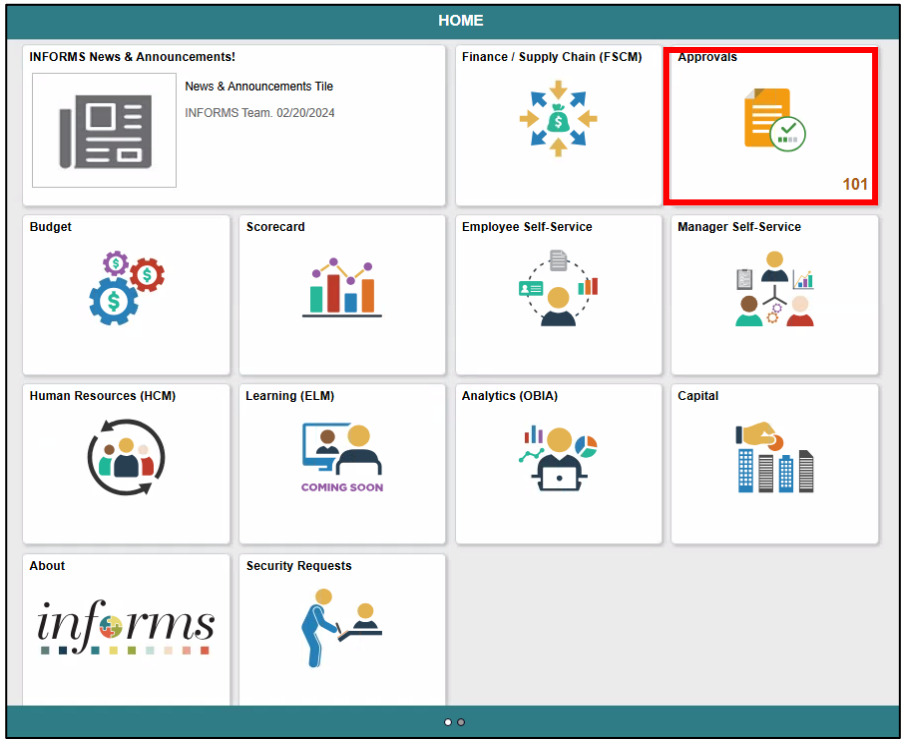
Lesson 8: Workflow Approvals Continued



Lesson 8: Workflow Approvals Continued

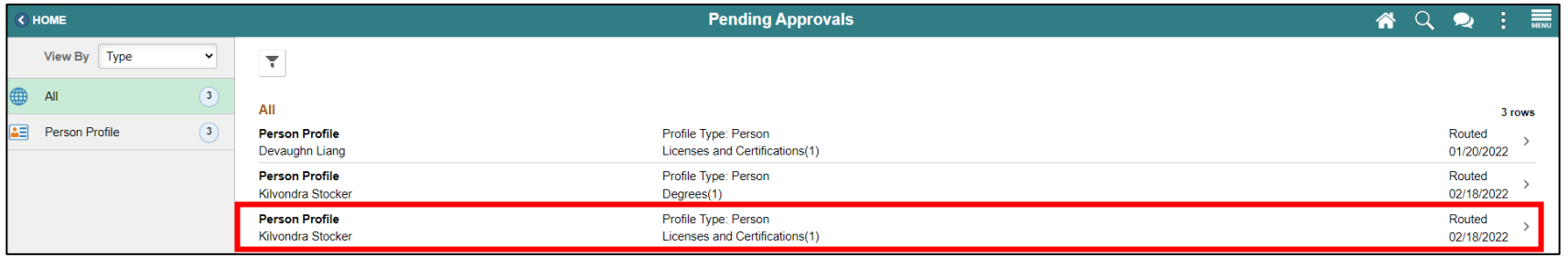
Navigate to Approvals: **Approvals**

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

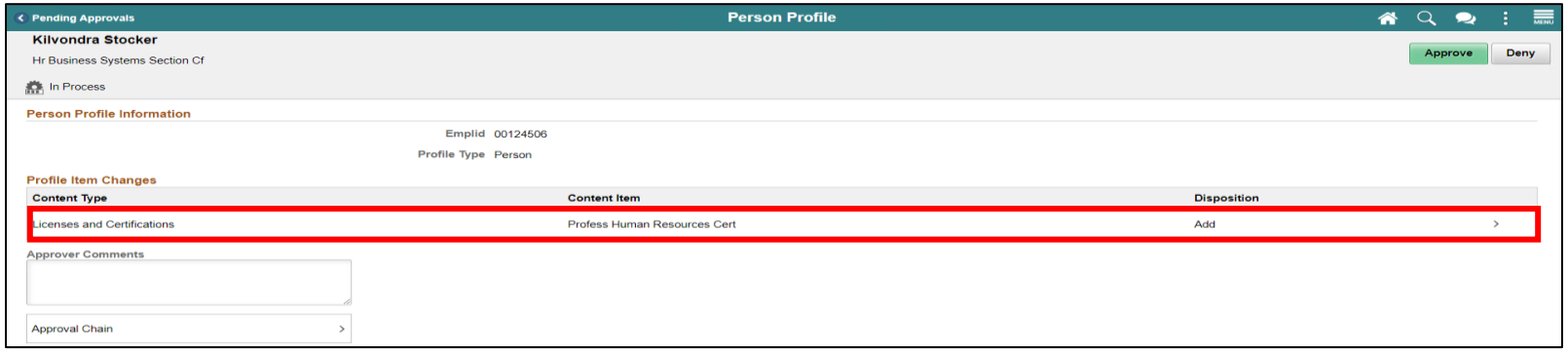


Lesson 8: Workflow Approvals Continued

1. Select the **Licenses and Certifications** request.

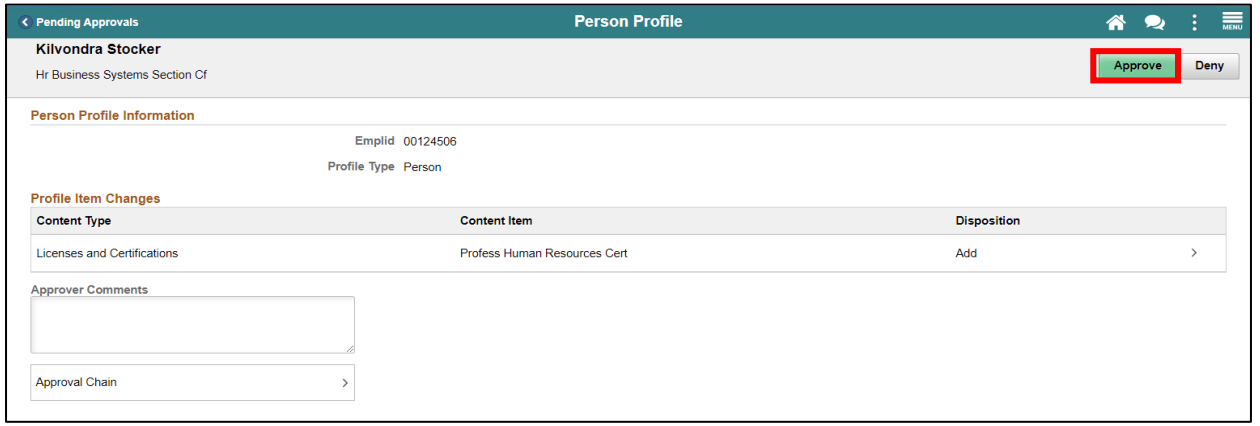


2. Select the **Profile Item Changes Content Item** to view the request before approving.

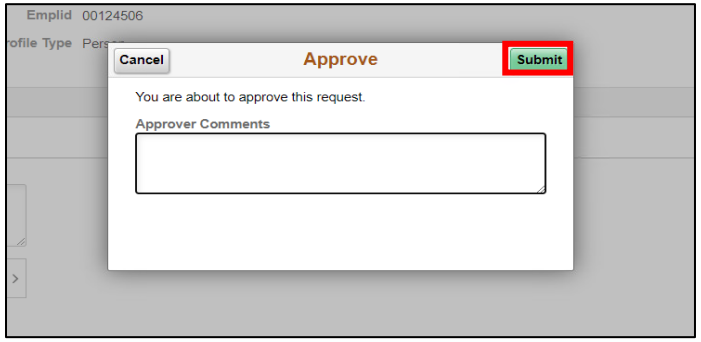


Lesson 8: Workflow Approvals Continued

3. Select **Approve**.

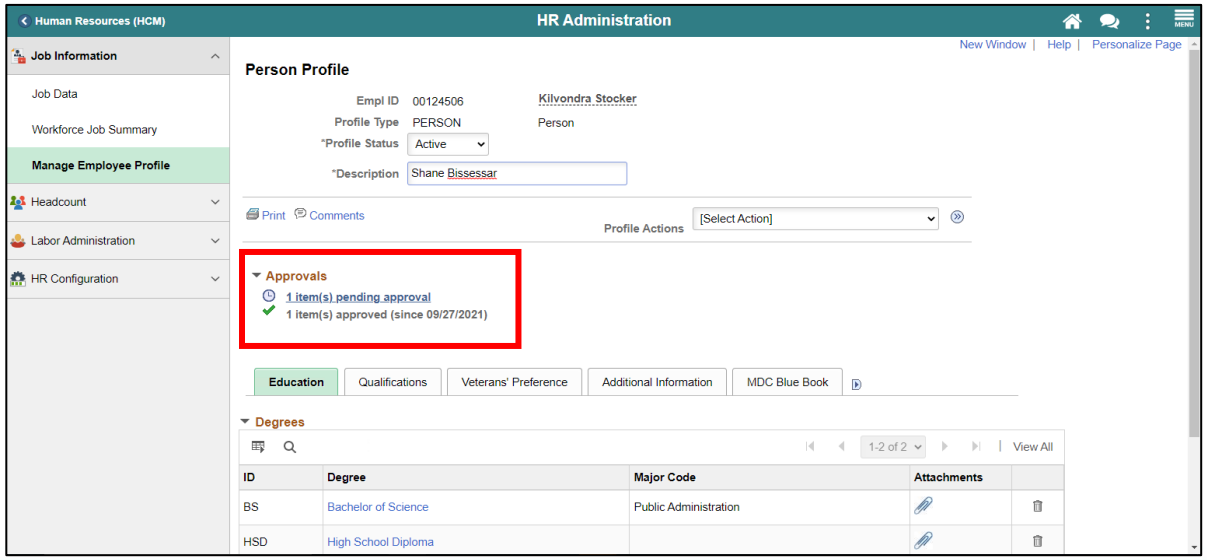


4. Select **Submit**.

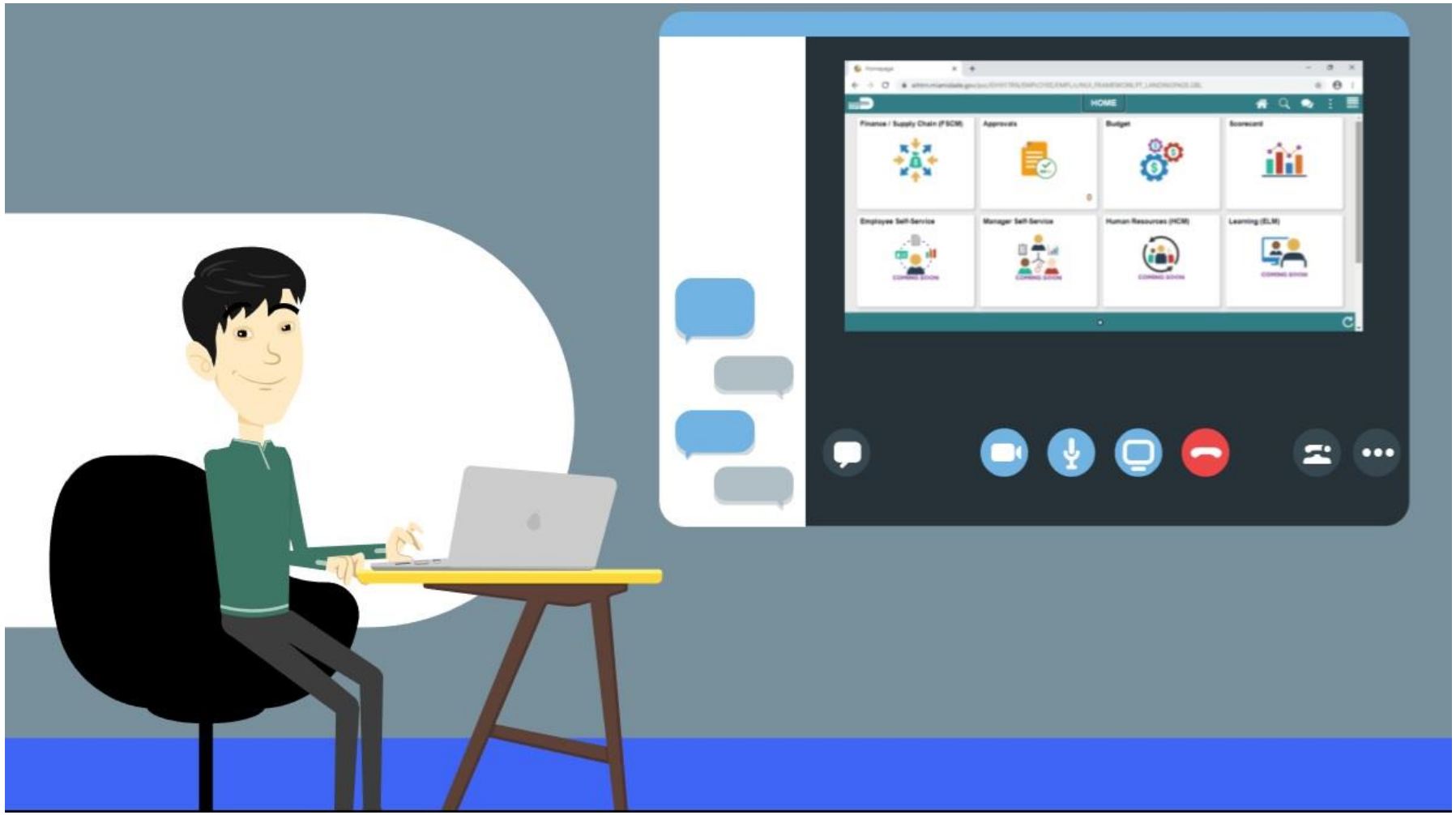


Lesson 8: Workflow Approvals Continued

- Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile**
  - The pending and approved License and Certifications can be found in this section
  - **Note:** Recently approved items will appear with a green check icon. Pending approvals will appear with a clock icon.



Lesson 8: Activities and Exercises



Lesson 8: 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

At the conclusion of this lesson, Participants 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

Lecture 1: Reports and Queries

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

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

Lesson 9: Lesson Summary

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: Activities and Exercises

Module 3: Course Summary

Module Topics
Course Content Summary
Additional Training and Job Aids
Course Summary

Course Content Summary

Congratulations on completing the DPR 302 – Personnel Changes course. You now understand:

- Submitting Job Changes
- Position Management
- Defining Department/Position Budget Data
- Submitting position change
- Submitting Job Data Changes that impact benefits
- Submitting HR Transactions
- Submitting HR Salary Changes
- Workflow Approvals
- Reports and Queries

For more information on INFORMS, please visit Miamidade.gov/informs

Additional Training and Job Aids

Other training materials, related to this topic, include:

- DPR 301 – ePerformance Management (Employee Performance Evaluation)
- 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 Job Aid
  - Budget Incumbent Job Aid
  - Paycheck Overview Job Aid
  - Approval of HR Transactions by OMB Job Aid
  - Approval of HR Transactions by Constitutional Offices Job Aid

For additional information, be sure to visit: www.miamidade.gov/informs

Congratulations on successfully completing the Personnel Changes course!

DPR 302 – Personnel Changes