

# Course ID: DPR 302

## Course: Personnel Changes

*Updated 01-08-2025*

# Ground Rules



Be on time



Attendance



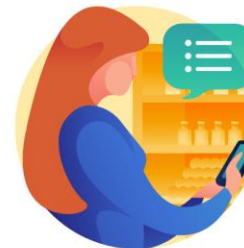
Turn off your cell phones  
when in class



Take breaks as needed



Participate actively in  
class; refrain from email  
and internet use



Feel free to ask questions

# Course Overview

|                           |   |
|---------------------------|---|
| <b>Course Description</b> | <p>This course provides a comprehensive review of the Personnel Changes processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>• Module 1: Course Introduction</li><li>• Module 2: Personnel Changes</li><li>• Module 3: Course Summary</li></ul> |
| <b>Training Audiences</b> | <ul style="list-style-type: none"><li>• Department Personnel Representative (DPR)</li></ul>   |
| <b>Prerequisites</b>      | <ul style="list-style-type: none"><li>• ERP 101 – Overview of INFORMS</li><li>• ERP 102 – INFORMS Navigation and Online Help</li><li>• HCM 101 – Human Resources Fundamentals</li></ul>   |

# Course Overview, Cont'd

|                              |   |
|------------------------------|---|
| <b>Other Related Courses</b> | <ul style="list-style-type: none"><li>• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)</li><li>• DPR 303 – Departmental HR - Time Management</li><li>• DPR 304 – Departmental HR - Updating Team Information</li><li>• DPR 321 – Departmental HR – Recruitment</li></ul> |
| <b>Estimated Duration</b>    | <ul style="list-style-type: none"><li>• 3 Hours</li></ul>   |



# 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

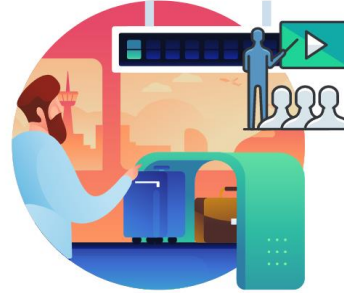
The End-to-End Business Process

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:

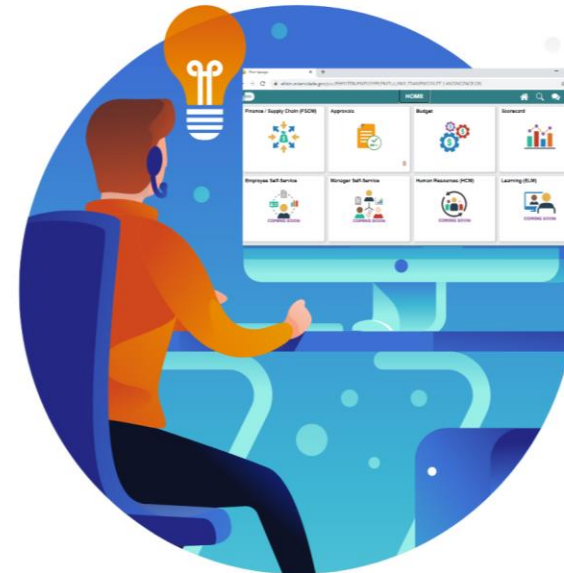
| Role   | Responsibilities  |
|--|---|
| <b>Department Personnel Representative</b>                       | The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.   |
| <b>Constitutional Office Department Personnel Representative</b> | The Constitutional Office Department Personnel Representative is responsible for reviewing and approving Employee Self-Service (ESS) and Manager Self-Service (MSS) transactions.                           |
| <b>HR Central Position Administrator</b>                         | The HR Central Position Administrator is responsible for creating, reviewing, editing and approving position edits and reporting.   |
| <b>HR Central Administrator Specialist</b>                       | The HR Central Administrator Specialist is responsible for Job Data changes. The HR Central Administrator Specialist can review and audit Manage Hire transactions.   |
| <b>HR Central Compensation Administrator</b>                     | 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

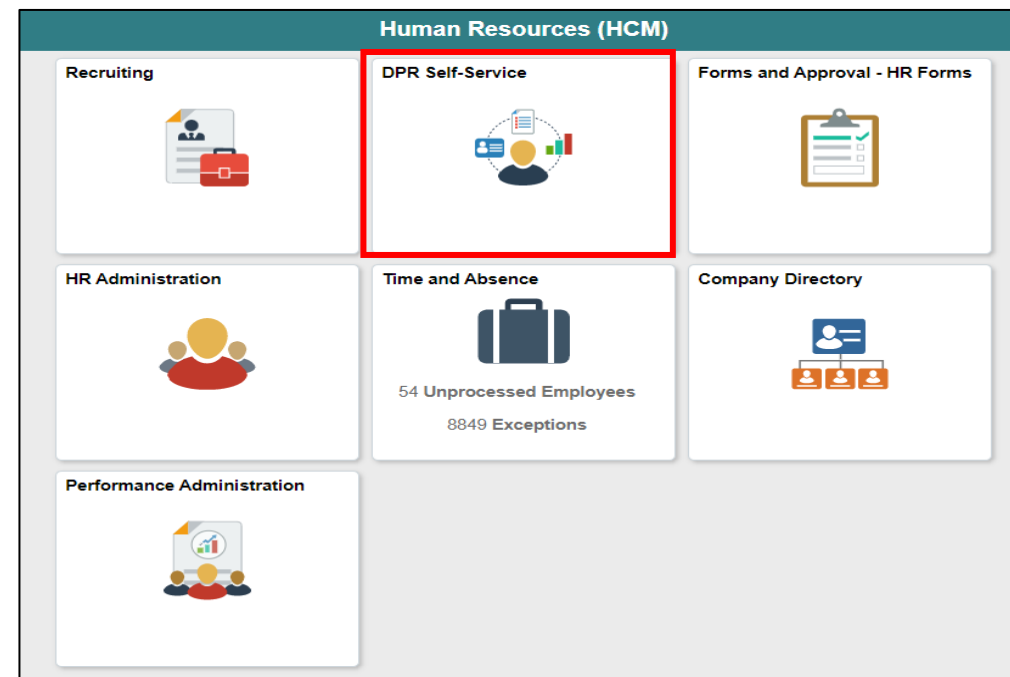
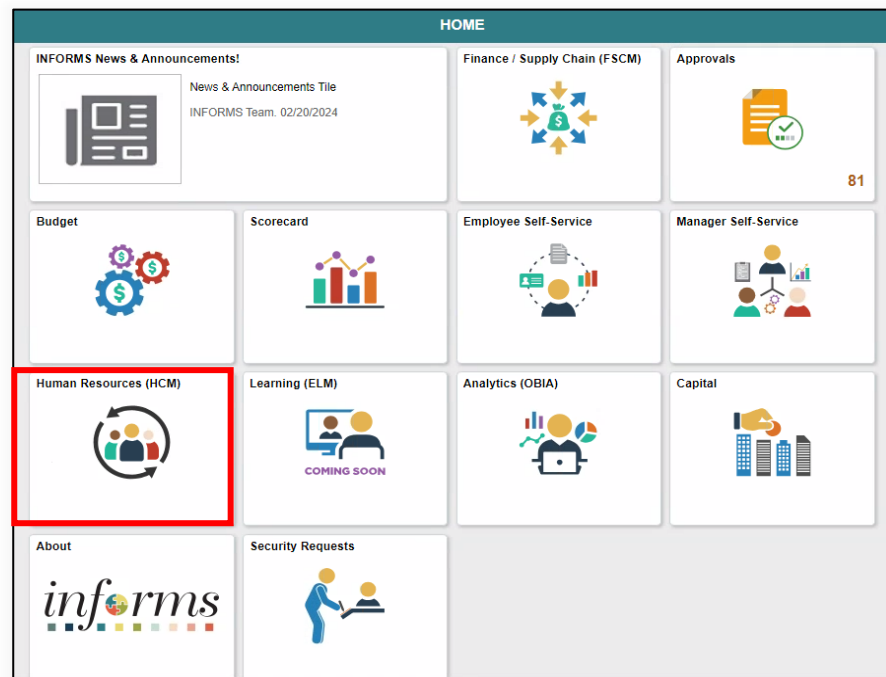


Training  
Exercises



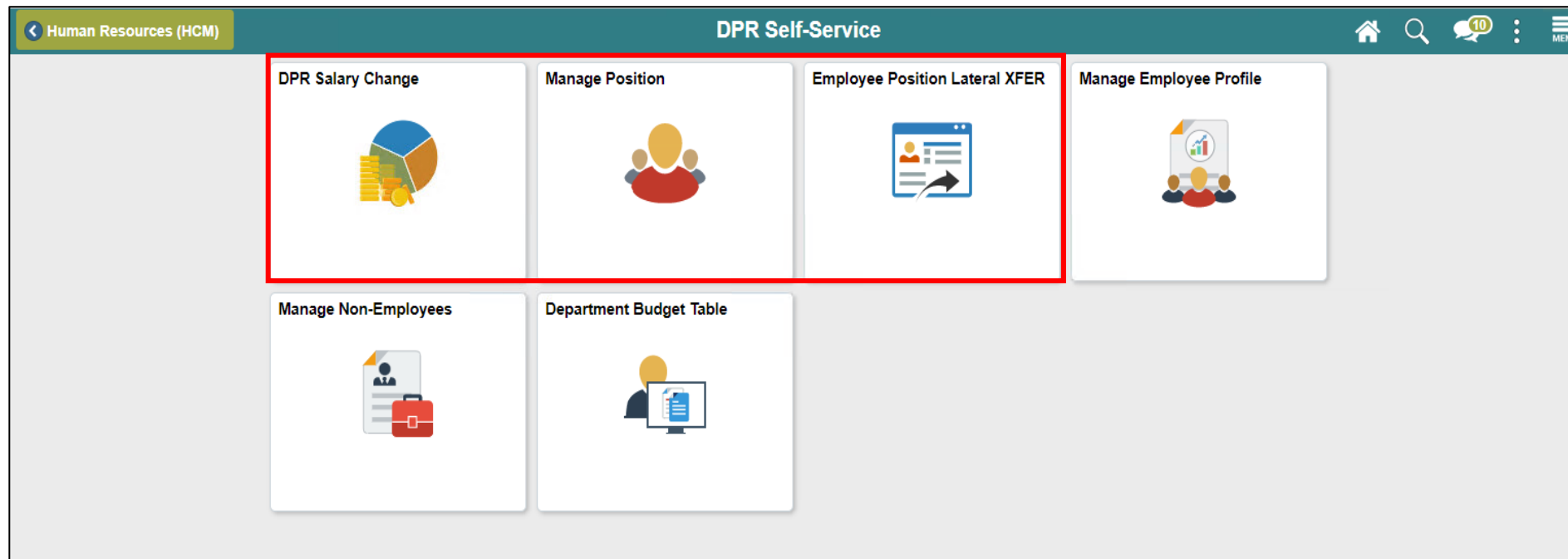
# Navigation

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



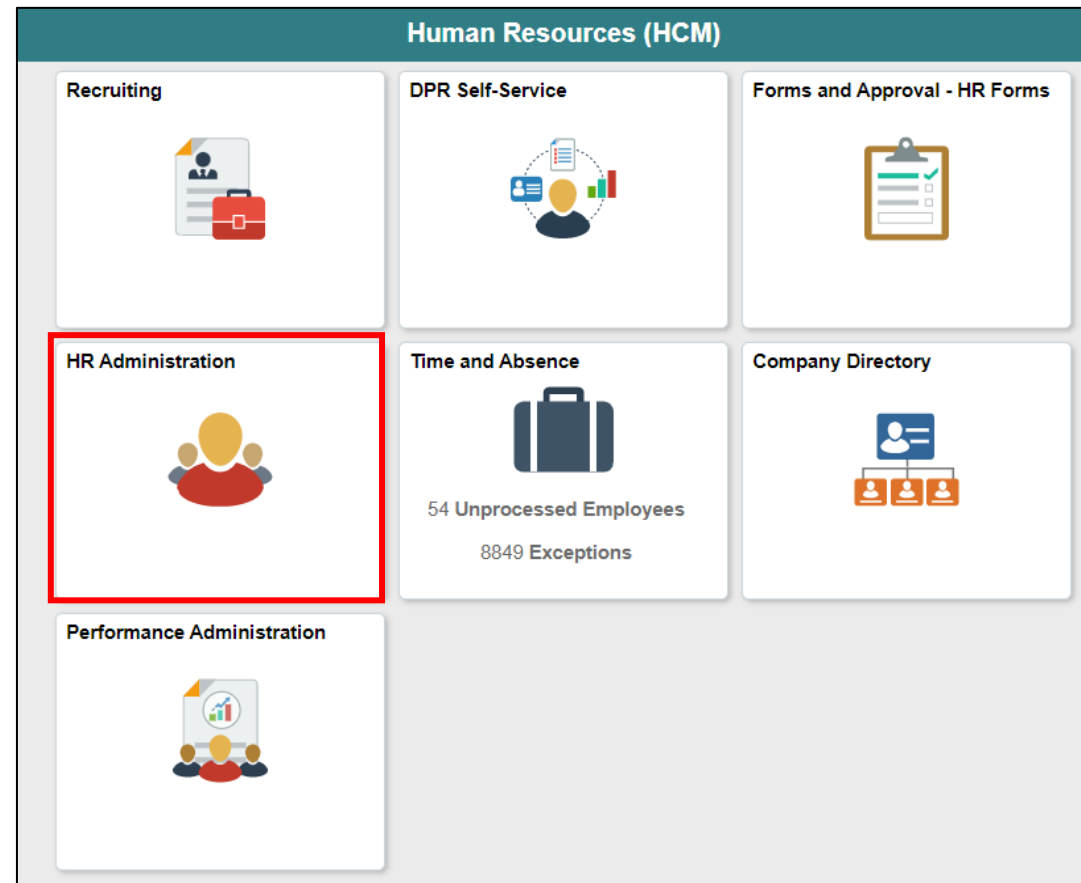
# Navigation Cont'd

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**

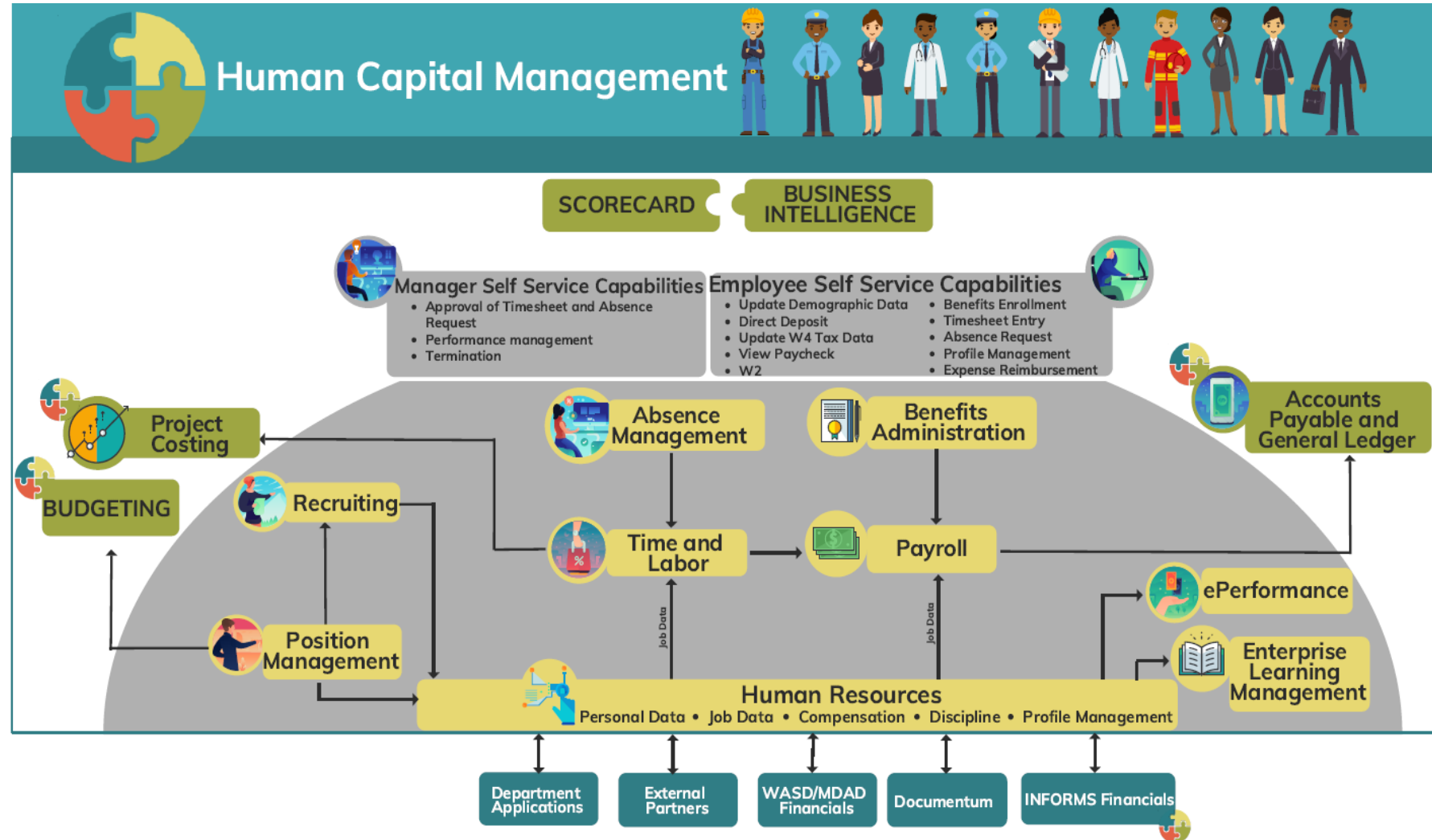


# Purpose and Benefits

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

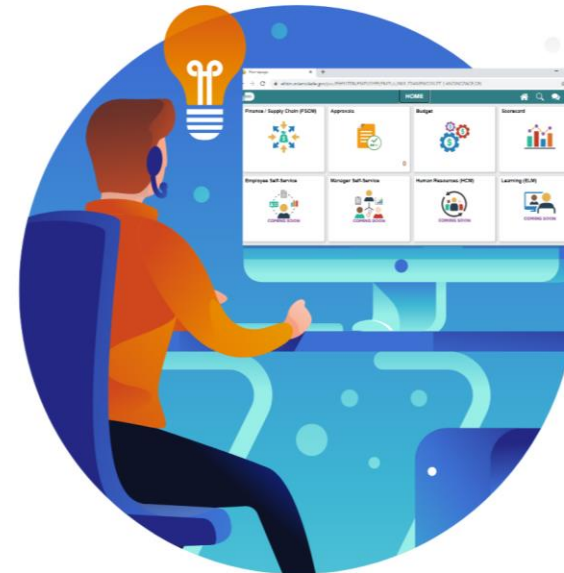


# Introduction to Activities and Exercises

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

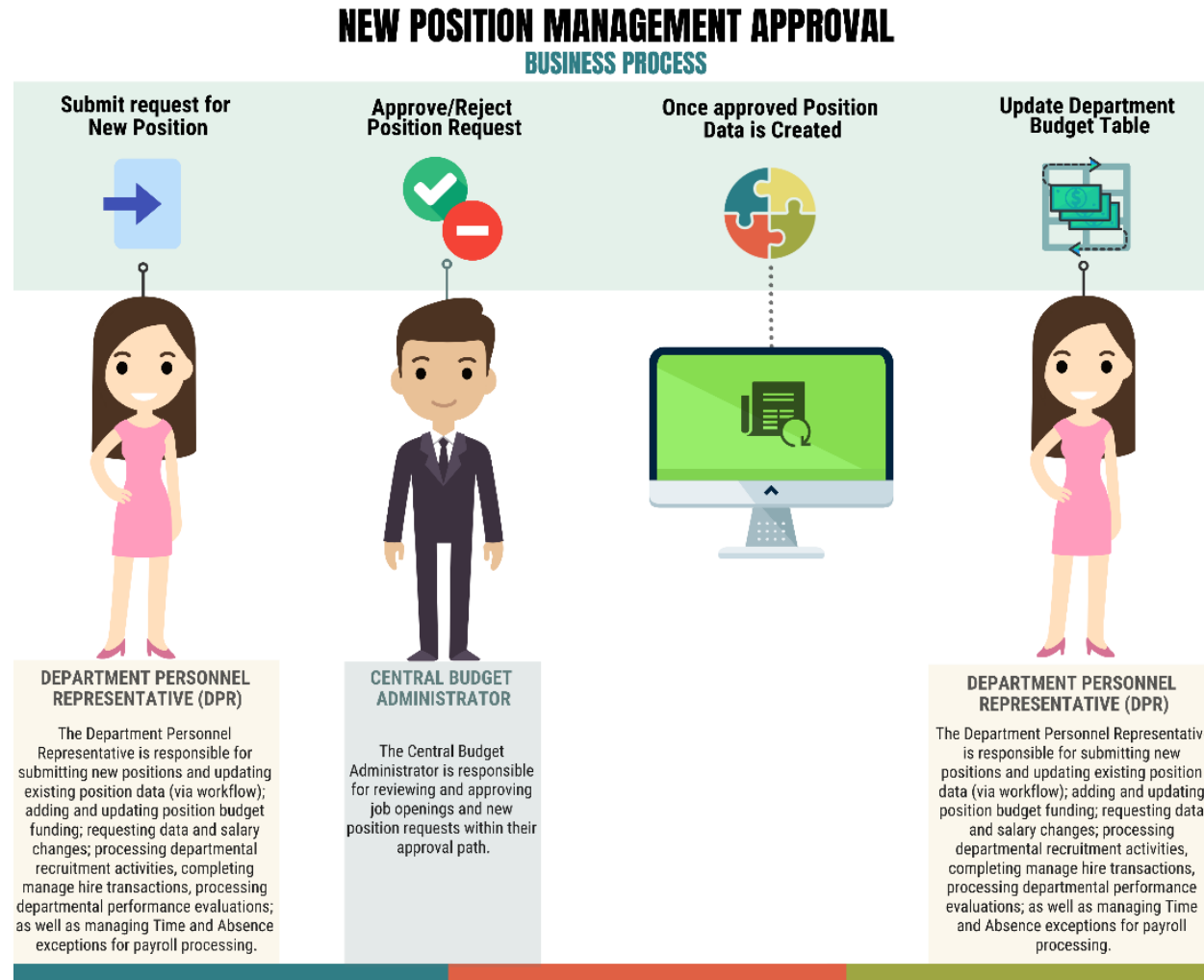
## Module Topics

### Module Introduction

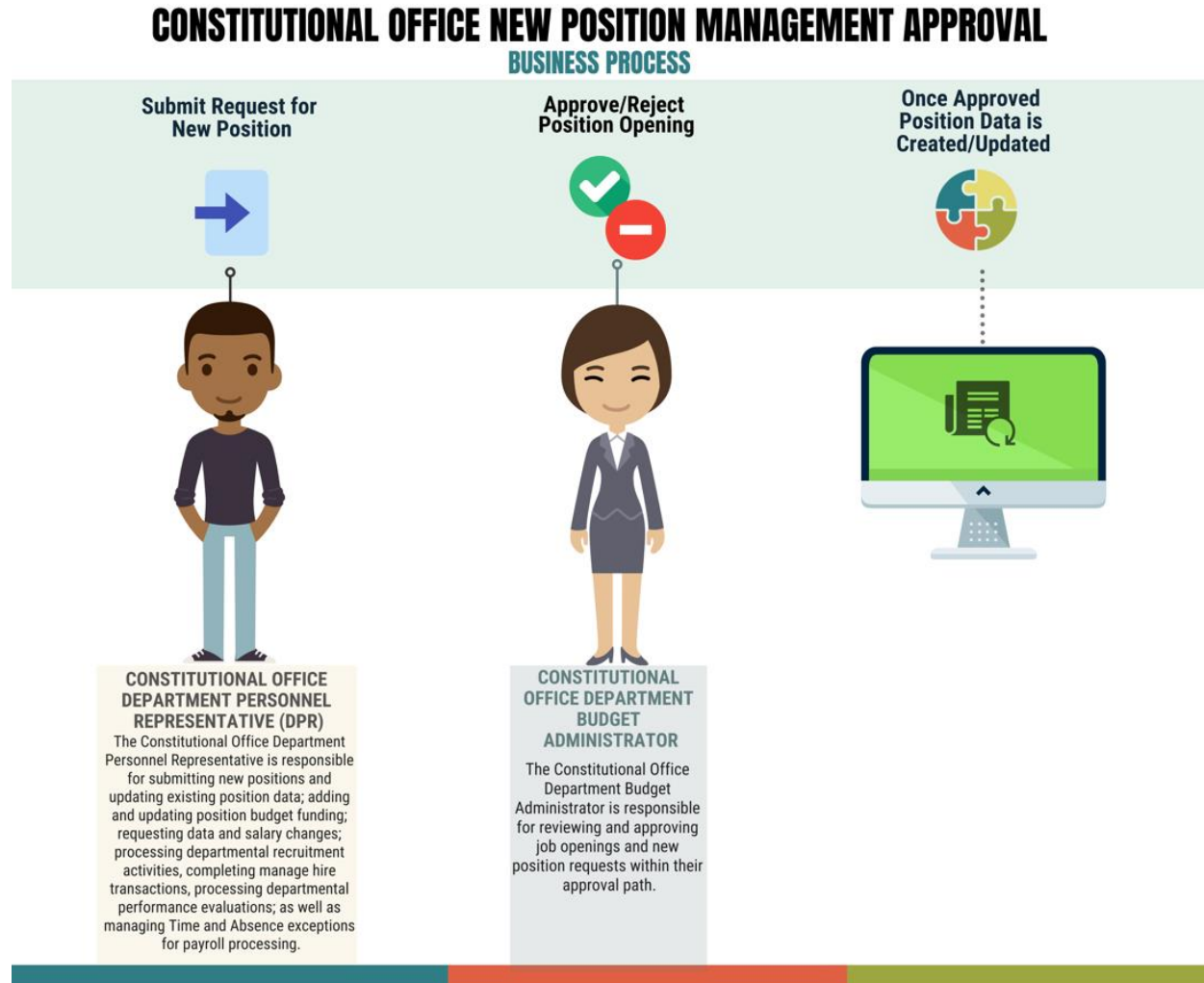
- Lesson 1: Position Management
- Lesson 2: Define Department/Position Budget Data
- Lesson 3: Submitting Position Change
- Lesson 4: Submit Job Data Changes that Impact Benefits
- Lesson 5: Submitting HR Transactions
- Lesson 6: Submitting HR Salary Changes
- Lesson 7: Payroll
- Lesson 8: Workflow Approvals
- 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  |
|-----------------------------------|---|
| <b>Full-Time Equivalent (FTE)</b> | A unit that indicates the workload of an employed person. FTEs are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.                          |
| <b>Job Code</b>                   | Contains the classification's title, salary plan and grade, bargaining unit, and job description.   |
| <b>Position Data</b>              | Details related to a position including Position Information, Job Information, Work Location, and Salary Plan Information.  |
| <b>Company</b>                    | A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets. |

# 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**.

The screenshot displays the DPR Self-Service interface. The top navigation bar shows 'DPR Self-Service'. Below it, there are several tiles: 'DPR Req Ad Hoc Salary Change', 'Manage Position' (highlighted with a red box), 'Employee Position Lateral XFER', 'Manage Employee Profile', 'Manage Non-Employees', and 'Record Administrative Actions'. Below these tiles, there is a 'View Manage/Create Position' section. In this section, there is a '+ Add' button (highlighted with a red box). Below the '+ Add' button, there is a 'Create Position' form. The form contains the following fields: 'Position Number' (00000000), '\*Effective Date' (12/27/2021, highlighted with a red box), 'Effective Sequence' (0), and 'Reason' (NEW New Position). A 'Continue' button (highlighted with a red box) is located at the bottom right of the form.

# 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**).

**Step 1 of 5: Position Data**

Effective Date 12/27/2021

Reason Code NEW New Position

Effective Sequence 0

Approval Status Not Available

**Position Information**

\*Filed Status Approved

Max Head Count 2

\*Status Active

Non-Mayoral No

Budgeted Position Yes

Senior Management No



# 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**

- **NOTE:** but u

Job Information

|                    |                 |                               |                 |                 |
|--------------------|-----------------|-------------------------------|-----------------|-----------------|
| *Business Unit     | PR              | Parks, Recreation & Open Spcs | *Full/Part Time | Full-Time       |
| *Job Code          | 000459          | HRIS Technician               | Union Code      | H               |
| *Regular/Temporary | Regular         |                               | Short Title     | HRIS Techn      |
| *Regular Shift     | Not Applicable  |                               | Description     | HRIS Technician |
| *Title             | HRIS Technician |                               |                 |                 |

ns from the Job Code

# Lecture 1: Create New Position Cont'd

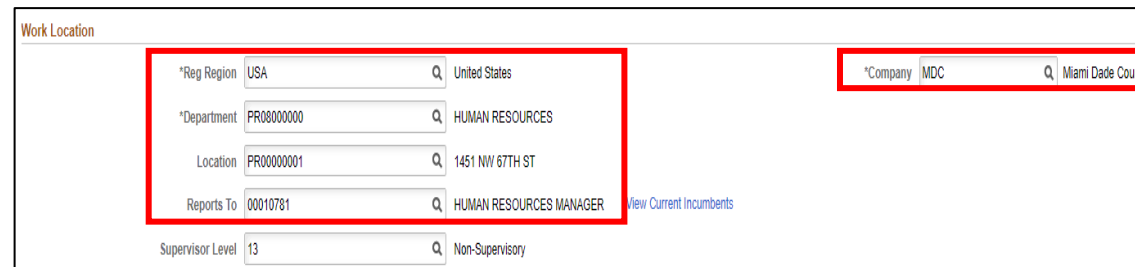
In the **Work Location** section, review or select the following:

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.



The screenshot shows a 'Work Location' form with several fields. A red box highlights the left column of fields: \*Reg Region (USA), \*Department (PR08000000), Location (PR00000001), Reports To (00010781), and Supervisor Level (13). Another red box highlights the \*Company field (MDC). The right column contains dropdown menus for United States, HUMAN RESOURCES, 1451 NW 67TH ST, HUMAN RESOURCES MANAGER, and Non-Supervisory. A link 'View Current Incumbents' is visible next to the Reports To field.

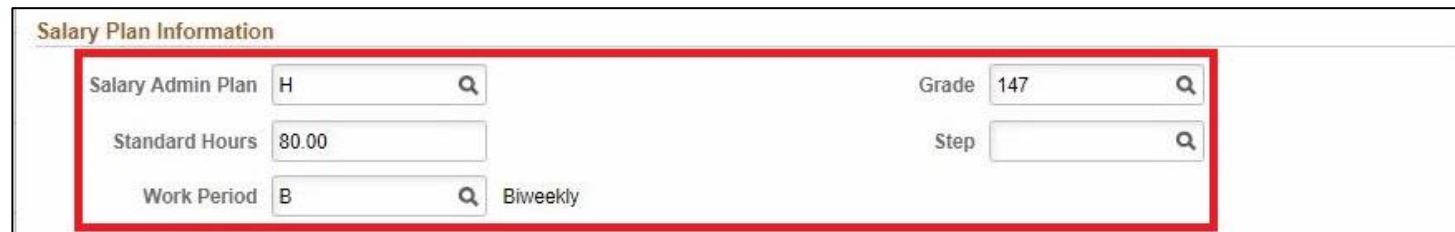
|                  |            |   |                         |
|------------------|------------|---|-------------------------|
| *Reg Region      | USA        | Q | United States           |
| *Department      | PR08000000 | Q | HUMAN RESOURCES         |
| Location         | PR00000001 | Q | 1451 NW 67TH ST         |
| Reports To       | 00010781   | Q | HUMAN RESOURCES MANAGER |
| Supervisor Level | 13         | Q | Non-Supervisory         |

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**.




Salary Plan Information

|                   |       |   |          |     |   |
|-------------------|-------|---|----------|-----|---|
| Salary Admin Plan | H     | Q | Grade    | 147 | Q |
| Standard Hours    | 80.00 |   | Step     |     | Q |
| Work Period       | B     | Q | Biweekly |     |   |

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

- **FLSA Status - Non-Job Basis/Job Basis** (Leave Defaulted)



▼ USA

|             |               |   |
|-------------|---------------|---|
| FLSA Status | Non Job Basis | ▼ |
|-------------|---------------|---|

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**

The screenshot displays the 'Create Position' form, specifically 'Step 2 of 5: Additional Information'. The form is divided into several sections. On the left, a sidebar lists the steps: 1. Position Data (Visited), 2. Additional Information (Current step), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main content area shows the following fields: Position Number (00000000), Headcount Status (Open), Current Head Count (0), Effective Date (12/27/2021), Effective Sequence (0), Reason Code (NEW - New Position), and Approval Status (Not Available). Below these, there is a section for 'Education and Government'. Further down, three dropdown menus are visible: '\*Pre-Encumbrance Indicator' (set to 'Encumber Immediately'), '\*Encumber Salary Option' (set to 'Salary Step'), and '\*Classified Indicator' (set to 'Classified'). The 'FTE' field is highlighted with a red box and contains the value '1.000000'. To the right of the FTE field, there is a field for 'Adds to FTE Actual Count' with a radio button set to 'No', also highlighted with a red box. Navigation buttons for '< Previous' and 'Next >' are located at the top right of the form.

# Lecture 1: Create New Position Cont'd

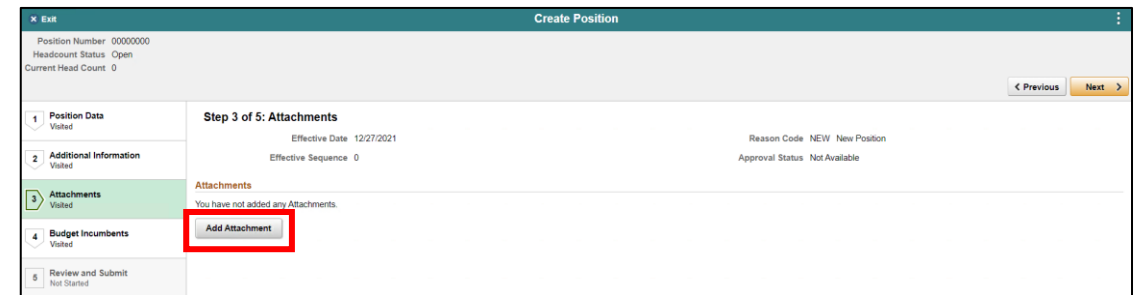
In the **Attachments** page, users add supporting documentation for the new position.

25. Select **Add Attachment**

26. Select **My Device**

27. Search the document to attach

28. Select **Open**.



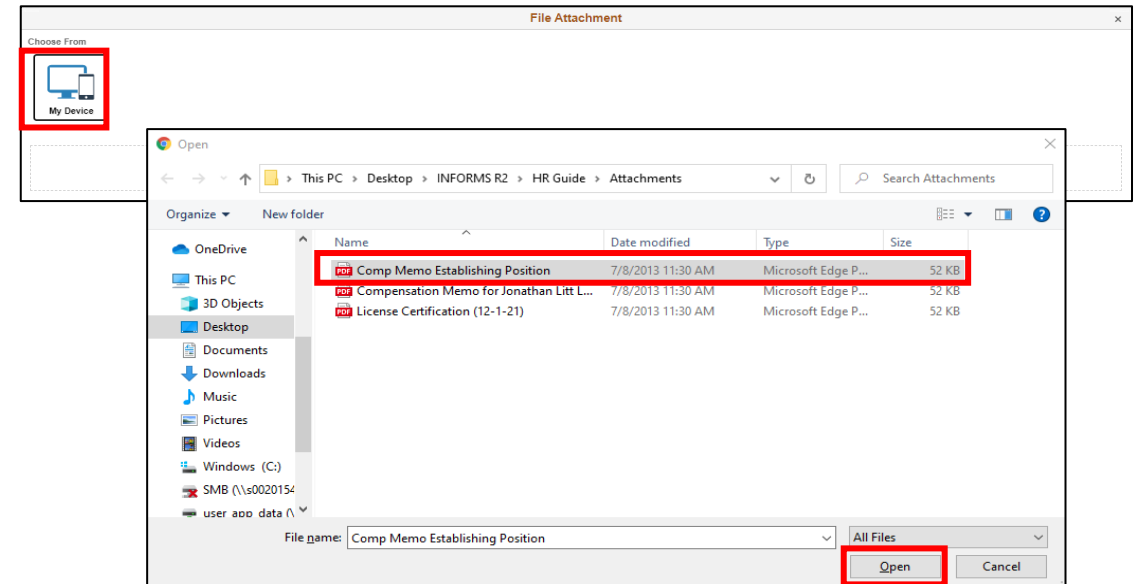
Step 3 of 5: Attachments

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

Effective Date: 12/27/2021  
Effective Sequence: 0  
Reason Code: NEW New Position  
Approval Status: Not Available

Attachments  
You have not added any Attachments.

**Add Attachment**



# 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**

The image shows two screenshots from a web application. The top screenshot is titled 'File Attachment' and shows a 'Choose From' section with a 'My Device' icon. Below it, a file named 'Comp Memo Establishing Position.pdf' with a size of 51KB is listed. A green progress bar at the bottom indicates 'Upload Complete'. A red box highlights the 'Done' button in the top right corner. The bottom screenshot is titled 'Create Position' and shows a progress bar with five steps: 'Position Data', 'Additional Information', 'Attachments', 'Budget Incumbents', and 'Review and Submit'. The 'Attachments' step is currently active. The 'Step 3 of 5: Attachments' section shows 'Effective Date: 12/27/2021', 'Effective Sequence: 0', 'Reason Code: NEW New Position', and 'Approval Status: Not Available'. Below this, there is an 'Add Attachment' button and a table of attachments. The table has columns for 'Attachments', 'Description', 'Attached By', 'Attached', and 'Status'. One attachment is listed: 'Comp\_Memo\_Establishing\_Position.pdf' with a description of 'Comp Memo Establishing (2) New Positions 12-27-21'. A red box highlights the 'Description' field. The 'Attached By' field shows 'Xavier Washington' and the 'Attached' field shows '12/27/21 10:21:47 AM'. The 'Status' field shows 'Active'. A red box highlights the 'Next' button in the top right corner.

| Attachments                         | Description                                       | Attached By       | Attached             | Status |
|-------------------------------------|---|-------------------|----------------------|--------|
| Comp_Memo_Establishing_Position.pdf | Comp Memo Establishing (2) New Positions 12-27-21 | Xavier Washington | 12/27/21 10:21:47 AM | Active |

# 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**.

**Create Position**

Position Number 00000000  
Headcount Status Open  
Current Head Count 0

< Previous **Next** >

**Step 4 of 5: Budget Incumbents**

Effective Date 12/27/2021 Reason Code NEW New Position  
Effective Sequence 0 Approval Status Not Available

**Current Budget**

Head Count 0 Amount 0.0000  
Current Budget FTE 0.00

**Incumbents**

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

**Current Incumbents**

No Incumbents to display

1 Position Data Visited  
2 Additional Information Visited  
3 Attachments Visited  
4 **Budget Incumbents** Visited  
5 Review and Submit Not Started



# 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.

**Create Position**

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

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

Effective Date: 12/27/2021  
Reason Code: NEW - New Position  
Effective Sequence: 0  
Approval Status: Not Available

**Key Information**

| Description                | Proposed Value |
|----------------------------|----------------|
| Business Unit              | PR             |
| Department                 | PR08000000     |
| Job Code                   | 000459         |
| Max Head Count             | 2              |
| Reports To Position Number | 00010781       |
| Location Code              | PR00000001     |
| Company                    | MDC            |

Buttons: < Previous, Submit

**Position Confirmation**

✓ The New Position Number 59000759 has been successfully submitted for approval.

**New Position Approval**

New Position Pending

**New Position Approval**

**Pending**

Multiple Approvers  
OMB Administrator

**Not Routed**

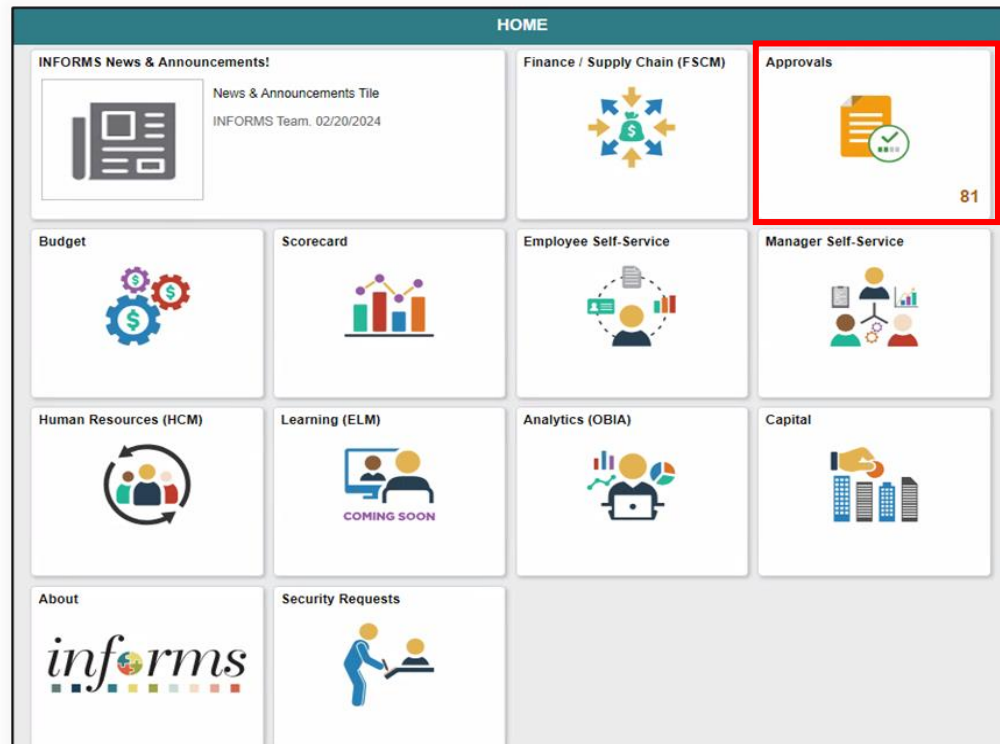
Multiple Approvers  
Compensation Administrator

Buttons: Go to Position Details, Go to Manage/Create Position, Go to Position Management

# Lecture 2: Budget Approval

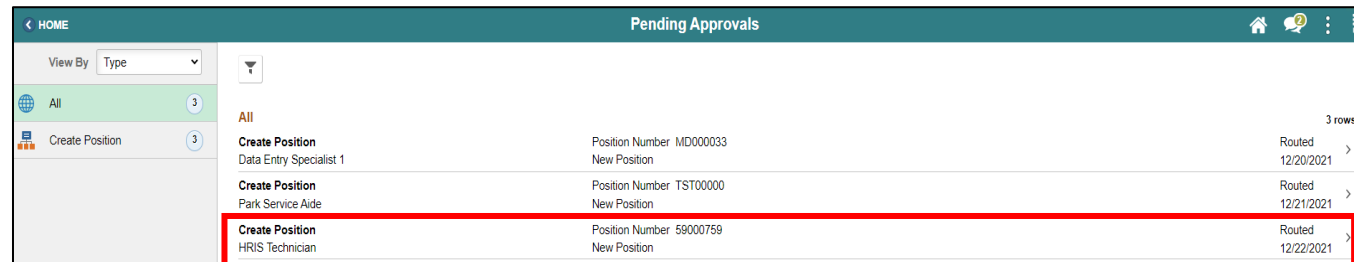
The OMB Budget Administrator and the Constitutional Office Department Budget Administrator are responsible for approving new position requests within INFORMS.

Navigate to Approvals: Select **Approvals**



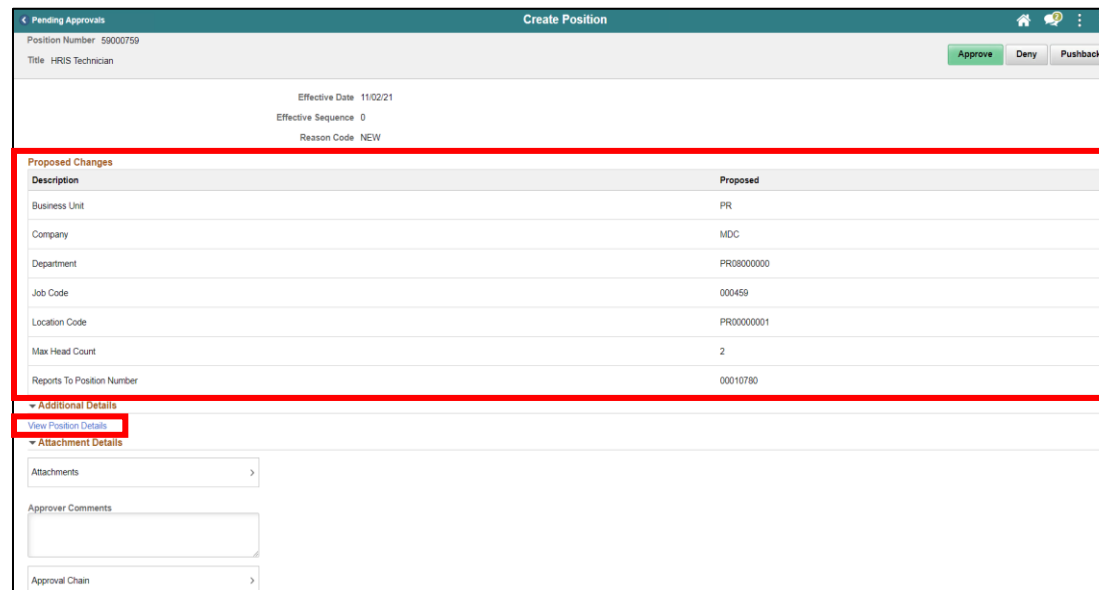
# Lecture 2: Budget Approval Cont'd

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



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

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



Position Number: 59000759  
Title: HRIS Technician  
Effective Date: 11/02/21  
Effective Sequence: 0  
Reason Code: NEW

Approve Deny Pushback

| Proposed Changes           |            |
|----------------------------|------------|
| Description                | Proposed   |
| Business Unit              | PR         |
| Company                    | MDC        |
| Department                 | PR08000000 |
| Job Code                   | 000459     |
| Location Code              | PR00000001 |
| Max Head Count             | 2          |
| Reports To Position Number | 00010780   |

Additional Details

View Position Details

Attachment Details

Attachments

Approver Comments

Approval Chain

# Lecture 2: Budget Approval Cont'd

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

View Position

Position Number: 58000759  
Headcount Status: Open  
Current Head Count: 0 of 0

Effective Date: 11/02/2021  
Effective Sequence: 0  
Reason: NEW - New Position  
Approval Status: In-Approval Process

<< PreviousNext >>

Position Information

Position Status: Approved  
Status: Active  
Action Date: 12/22/2021  
Key Position: No  
Budgeted Position: Yes  
Senior Management: No

Max Head Count: 2  
Status Date: 11/02/2021  
Job Sharing Permitted: No  
Non-Mayoral: No

Job Information

Business Unit: PR  
Job Code: 00049  
Regular/Temporary: Regular  
Regular Shift: Not Applicable  
Title: HRIS Technician

Parks, Recreation & Open Space  
HRIS Technician

Manager Level: All Other Positions  
Full/Part Time: Full-Time  
Union Code: H  
Short Title: HRIS Techn  
Description: HRIS Technician

Work Location

Reg Region: USA  
Department: PR00000000  
Location: PR00000001  
Reports To: 00010700  
Supervisor Lvl: 13

United States  
HUMAN RESOURCES  
1451 NW 67TH ST  
CHIEFHUMAN RESOURCES DIVISION  
Non-Supervisory

Company: MDC  
Dist/Line  
Security Clearance

Miami Dade County

Salary Plan Information

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

Grade: 207  
Step  
Mon Tue Wed Thu Fri Sat Sun  
Biweekly

Specific Information

Education and Government

Budget and Incumbents

Summary of Changes

Attachments

View Attachments

40

MIAMI-DADE  
COUNTY

# 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.

← Pending Approvals Create Position

Position Number: 590000759  
Title: HRIS Technician

Effective Date: 11/02/21  
Effective Sequence: 0  
Reason Code: NEW

Proposed Changes

| Description                | Proposed   |
|----------------------------|------------|
| Business Unit              | PR         |
| Company                    | MDC        |
| Department                 | PR08000000 |
| Job Code                   | 000459     |
| Location Code              | PR00000001 |
| Max Head Count             | 2          |
| Reports To Position Number | 00010780   |

Additional Details  
View Position Details  
Attachment Details

Attachments

Approver Comments

Approval Chain

| Attachments   |   |                   |                      |
|---|---|-------------------|----------------------|
| Attachments   |   |                   |                      |
| 1 row   |   |                   |                      |
| Attachments   | Description                                       | Attached By       | Attached             |
| <a href="#">Comp_Memo_Establishing_Position.pdf</a> | Comp Establishment of (2) New Positions (11-2-21) | Xavier Washington | 12/22/21 01:38:02 PM |

# 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.

Cancel Approve Submit

You are about to approve this request.

Approver Comments

Reviewed and Approved

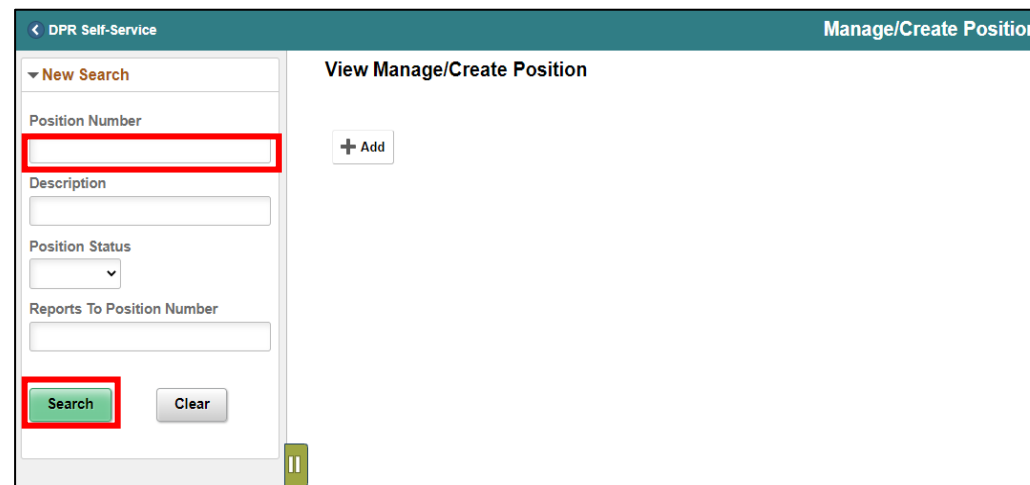
| Pending Approvals       |                 |          |                     |
|-------------------------|-----------------|----------|---------------------|
| All                     |                 |          |                     |
| Create Position         | Position Number | MD000033 | 2 rows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

# Lecture 3: Validate Position

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

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

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



The screenshot shows the 'DPR Self-Service' interface with the 'Manage/Create Position' tab selected. On the left, there is a 'New Search' section with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. At the bottom of this section, the 'Search' button is highlighted with a red box, and a 'Clear' button is also visible. To the right of the search fields is a '+ Add' button. The main area on the right is titled 'View Manage/Create Position' and is currently empty.

# Lecture 3: Validate Position Cont'd

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

- The Status displays **Approved**



| Position Number | Description     | Reports To | Business Unit | Company | Department | Status | Job Code | Current Head Count |
|-----------------|-----------------|------------|---------------|---------|------------|--------|----------|--------------------|
| 59000759        | HRIS Technician | 00010781   | PR            | MDC     | PR08000000 | Active | 000459   | 02                 |

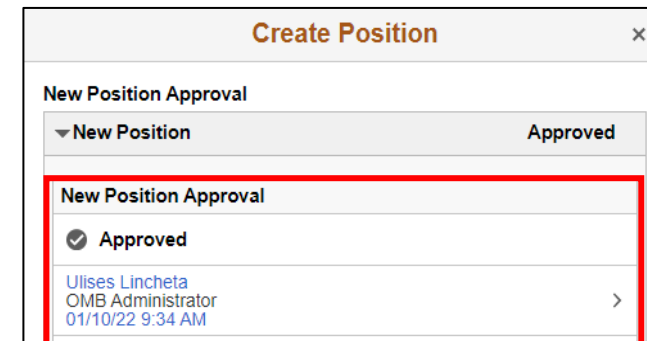
## 4. Select the **Approval Chain** hyperlink link to view the approvers

- 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



| Effective Date | Effective Sequence | Reason       | Business Unit                 | Department      | Job Code        | Location        | Status   | Approval Chain |
|----------------|--------------------|--------------|-------------------------------|-----------------|-----------------|-----------------|----------|----------------|
| 12/27/2021     | 0                  | New Position | Parks, Recreation & Open Spcs | HUMAN RESOURCES | Hris Technician | 1451 NW 67TH ST | Approved | Approval Chain |



**Create Position**

**New Position Approval**

**New Position** **Approved**

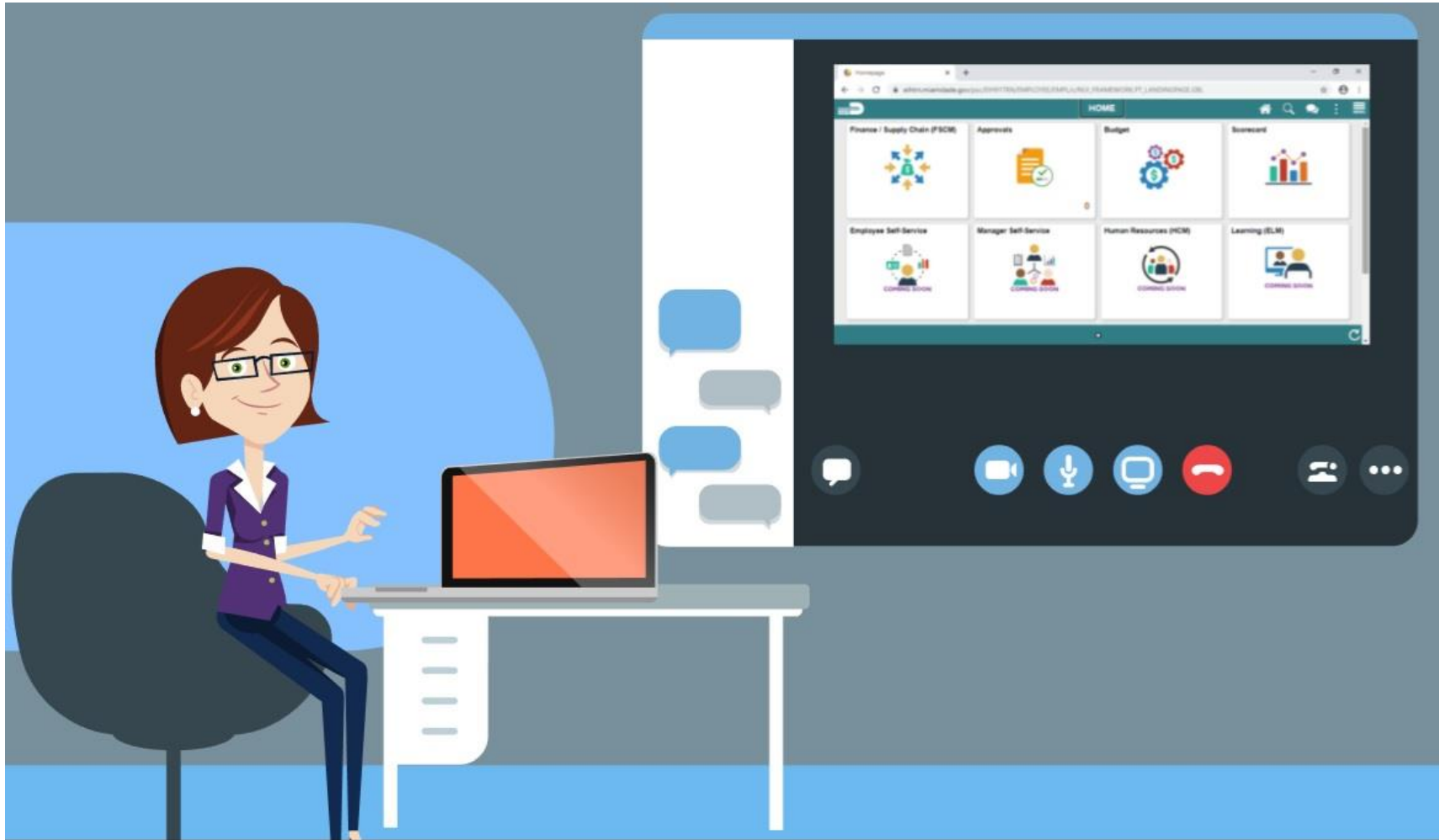
**New Position Approval**

✓ **Approved**

Ulises Lincheta  
OMB Administrator  
01/10/22 9:34 AM



# 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

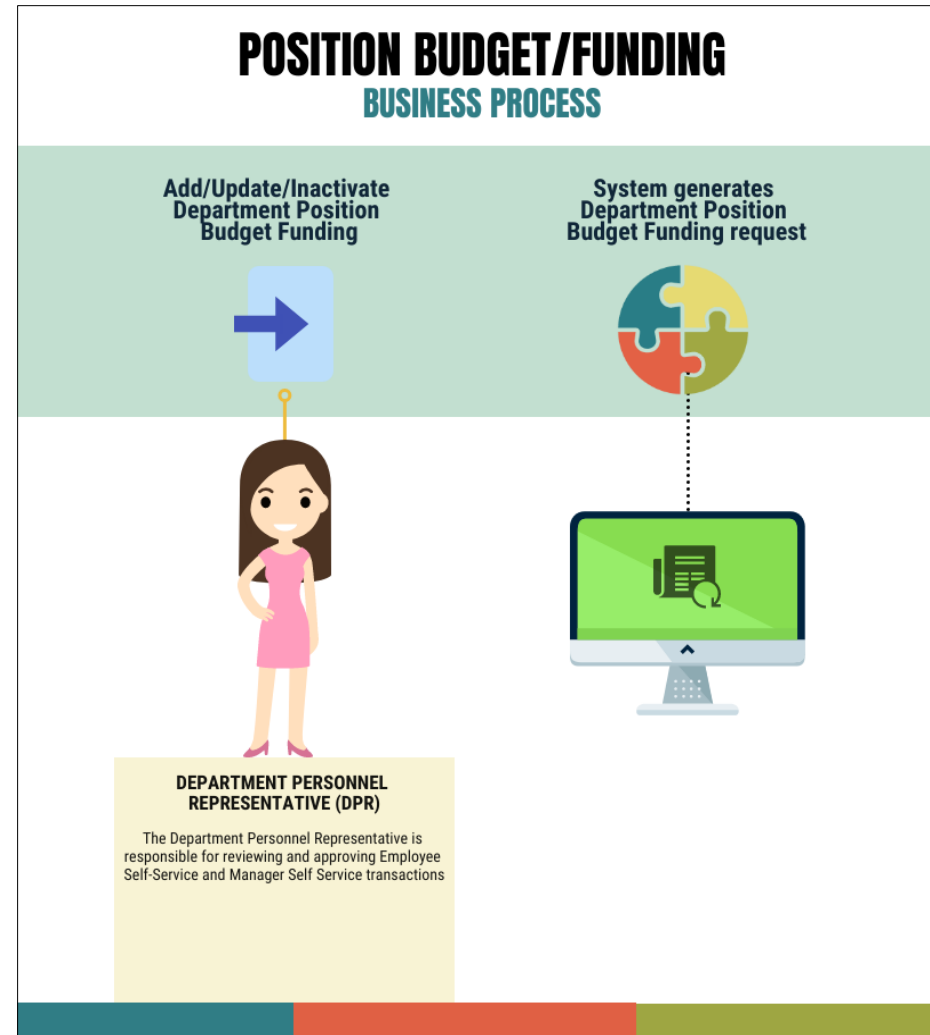
At the conclusion of this lesson, participants will be able to:

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

# Lesson 2: Define Department/Position Budget Data



# Lesson 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

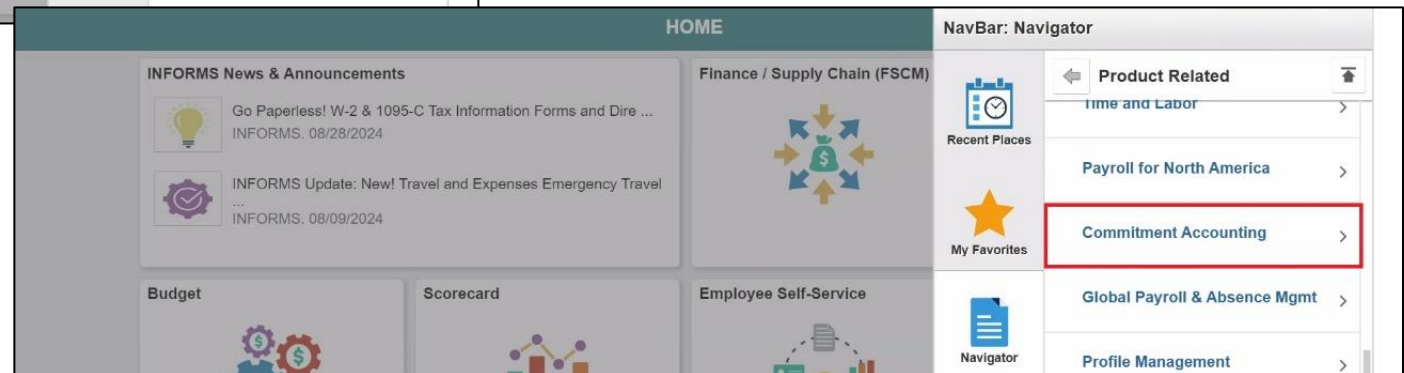
Navigate to Department Budget Table USA: **Navigator > Human Capital Management (HCM) > Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA**

The image displays two screenshots of the Oracle HR Cloud interface. The top screenshot shows the 'HOME' dashboard with a 'NavBar: Navigator' on the right. The 'Human Capital Management (HCM)' link is highlighted with a red box. The bottom screenshot shows the 'Department Budget Table USA' page, where the 'Set Up HCM' link in the 'NavBar: Navigator' is highlighted with a red box. The page title is 'Department Budget Table USA' and it includes a search bar and search criteria section.



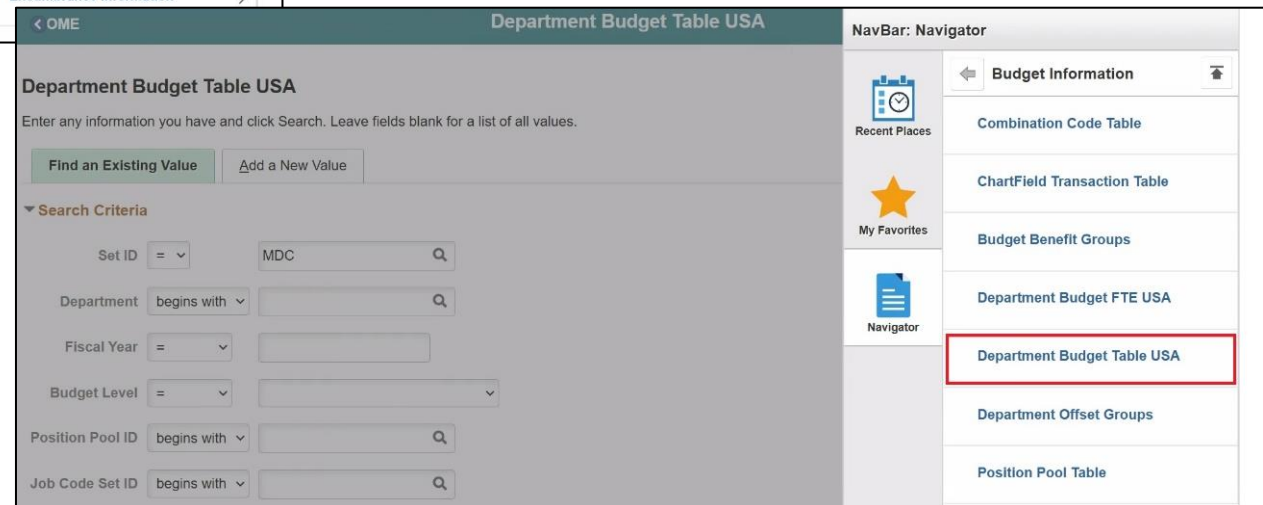
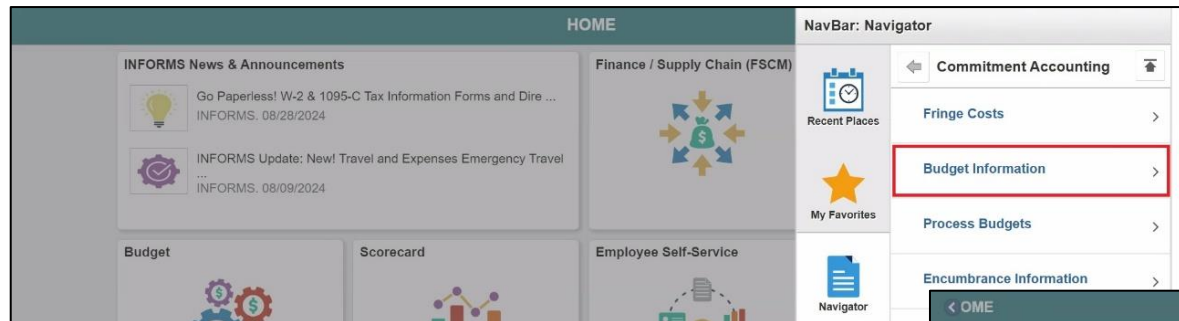
# Lecture 1: Add Position Budget Funding Cont'd

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



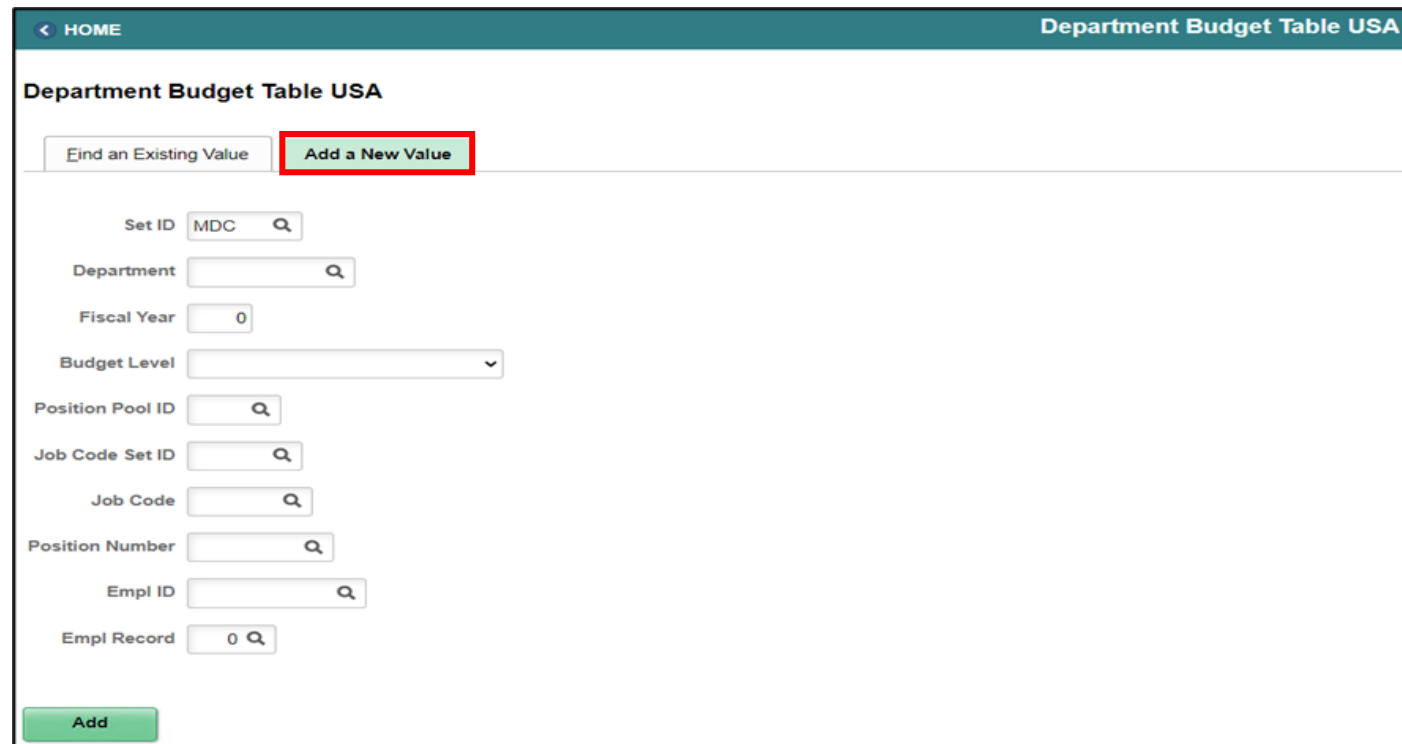
# Lecture 1: Add Position Budget Funding Cont'd

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.



The screenshot displays the 'Department Budget Table USA' interface. At the top, there is a navigation bar with a back arrow and the text 'HOME' on the left, and 'Department Budget Table USA' on the right. Below this, the title 'Department Budget Table USA' is repeated. Two tabs are visible: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red rectangular box. Below the tabs, there is a form with several input fields, each with a magnifying glass icon for search: 'Set ID' (containing 'MDC'), 'Department', 'Fiscal Year' (containing '0'), 'Budget Level' (a dropdown menu), 'Position Pool ID', 'Job Code Set ID', 'Job Code', 'Position Number', 'Empl ID', and 'Empl Record' (containing '0'). At the bottom left of the form is a green 'Add' button.

# 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            |
|---------------------|------------------------------|
| 2025                | FY 24-25 (10/1/24– 9/30/25)  |
| 2026                | FY 25-26 (10/1/25 – 9/30/26) |
| 2027                | FY 26-27 (10/1/26 – 9/30/27) |

# 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**.

The screenshot shows the 'Department Budget Table USA' form. The form has a teal header with a back arrow and 'HOME' text on the left, and 'Department Budget Table USA' on the right. Below the header, there's a section titled 'Department Budget Table USA' with two buttons: 'Find an Existing Value' and 'Add a New Value'. The form contains several input fields: 'Set ID' (with 'MDC' entered), 'Department', 'Fiscal Year' (with '0' entered), 'Budget Level' (a dropdown menu highlighted with a red box), 'Position Pool ID', 'Job Code Set ID', 'Job Code', 'Position Number' (highlighted with a red box), 'Empl ID', and 'Empl Record' (with '0' entered). At the bottom left, there is a green 'Add' button highlighted with a red box.

# 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.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Date' tab is selected and highlighted with a red box. Below the tab, the 'Set ID' is 'MDC' and the 'Department' is 'PR08000000 HUMAN RESOURCES'. The 'Fiscal Year' is '2022'. The '\*Budget Begin Date' is '10/01/2021' and the '\*Budget End Date' is '09/30/2022', both highlighted with red boxes. The '\*Offset Group' is 'MDC' with a search icon and 'Miami Dade Offset' displayed, also highlighted with a red box. The 'Budget Cap' section shows 'Per Budget Level' selected. The 'Suspense Combination Code' section has a search bar and '1 of 1' results. The '\*Effective Date' is '10/01/2021', highlighted with a red box. The 'Effective Sequence' is '0'. A 'ChartField Details' hyperlink is highlighted with a red box. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes'.

# 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.

The screenshot shows the 'ChartField Common Component' dialog box. The 'Combination Code' field is highlighted with a red box and contains the text 'SUSP\_DEFAULT'. Below this, there is a 'Search Options' section with a radio button for 'Combination Codes' and a 'Search' button. At the bottom of the dialog, there is a table with columns: Fund Code, Department, Account, Grant, PC Business Unit, Project, Activity, Source Type, Category, and Subcategory. The first row contains the values: G1001, PR00000000, 5001170000, NO-GRANT, and several empty fields. The 'Ok' button is highlighted with a red box.

| Fund Code | Department | Account    | Grant    | PC Business Unit | Project | Activity | Source Type | Category | Subcategory |
|-----------|------------|------------|----------|------------------|---------|----------|-------------|----------|-------------|
| G1001     | PR00000000 | 5001170000 | NO-GRANT |                  |         |          |             |          |             |

The screenshot shows the 'Department Budget Table USA' interface. The 'Suspense Combination Code' section is highlighted with a red box and contains the text 'SUSP\_DEFAULT'. The 'Effective Date' is set to 10/01/2021, and the 'Effective Sequence' is 0. The 'Default Suspense' is 0.00. The 'ChartField Details' link is visible. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'.

| Set ID             | MDC        | Department | PR00000000 | HUMAN RESOURCES   |
|--------------------|------------|------------|------------|-------------------|
| Fiscal Year        | 2022       |            |            |                   |
| *Budget Begin Date | 10/01/2021 |            |            |                   |
| *Budget End Date   | 09/30/2022 |            |            |                   |
| *Offset Group      | MDC        |            |            | Miami Dade Offset |

# 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**

Department Budget Table USA

HOME

Dept Budget Date | **Dept Budget Defaults** | Dept Budget Earnings | Dept Budget Deductions >

Set ID MDC Department PR08000000 HUMAN RESOURCES Fiscal Year 2022

\*Budget Begin Date 10/01/2021 \*Offset Group MDC Miami Dade Offset

\*Budget End Date 09/30/2022

Budget Cap

☒ Per Budget Level ☐ Per Earn/Tax/Ded

Funding Defaults

\*Default Funding Source Option Distrib over Actual Earnings ☐ Funding End Date Defaults From Funding Source

Exclusion Fringe Group

Account Overrides

☒ Use Acct Defined for Earnings ☒ Use Account Defined for US Tax

☒ Use Account Defined for Dedns ☒ Use Account Defined for Can Tax

Save Notify Add Update/Display Include History

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



# 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.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected. The form includes fields for Set ID, MDC, Department, Budget Begin Date, Budget End Date, Fiscal Year, Offset Group, and Budget Cap. The 'Level' section shows 'Position' selected with 'Position Number' 59000759 and '\*Effective Date' 11/15/2021. The '\*Status' is set to 'Active'. The 'Earnings Distribution' section has the 'Combination Code' tab selected, showing a table with columns for Earnings Code, \*Sequence Number, Combination Code, Funding End Date, Fiscal Year Budget Amount, Allow Overspend, and Distribution %. The first row has '1' in the Earnings Code and \*Sequence Number fields, and '100' in the Distribution % field. Red boxes highlight the 'Dept Budget Earnings' tab, the 'Position Number' and '\*Effective Date' fields, the '\*Status' dropdown, the '\*Sequence Number' field, and the 'Distribution %' field.

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

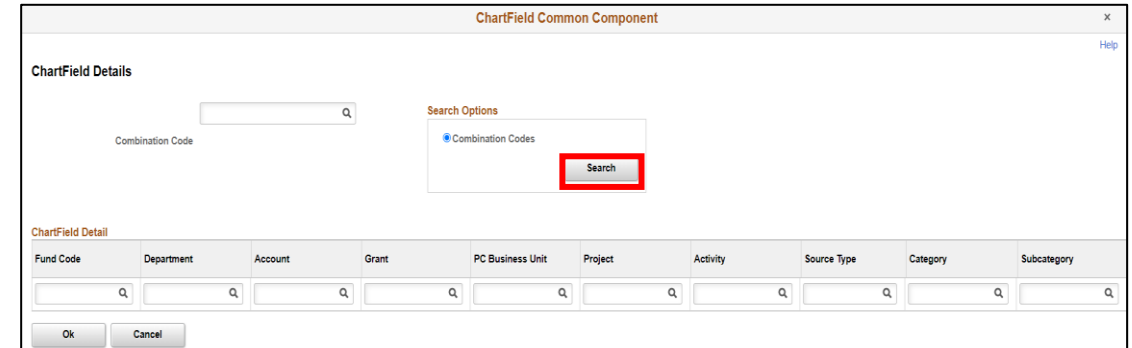
# Lecture 1: Add Position Budget Funding Cont'd

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.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is active. The 'Earnings Distribution' section is visible, showing a table with columns: Earnings Code, Sequence Number, Combination Code, Combination Code Description, and ChartField Details. The 'Combination Code Description' tab is highlighted with a red box. Below the table, the 'ChartField Details' link is also highlighted with a red box. The interface includes various filters and search options at the top and bottom.

# 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**



ChartField Common Component

ChartField Details

Combination Code

Search Options

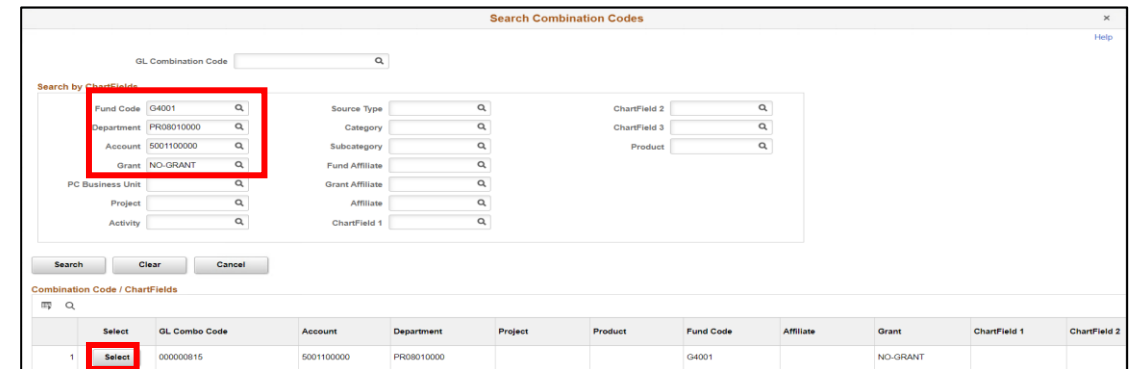
Combination Codes

Search

ChartField Detail

| Fund Code            | Department           | Account              | Grant                | PC Business Unit     | Project              | Activity             | Source Type          | Category             | Subcategory          |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Ok Cancel



Search Combination Codes

GL Combination Code

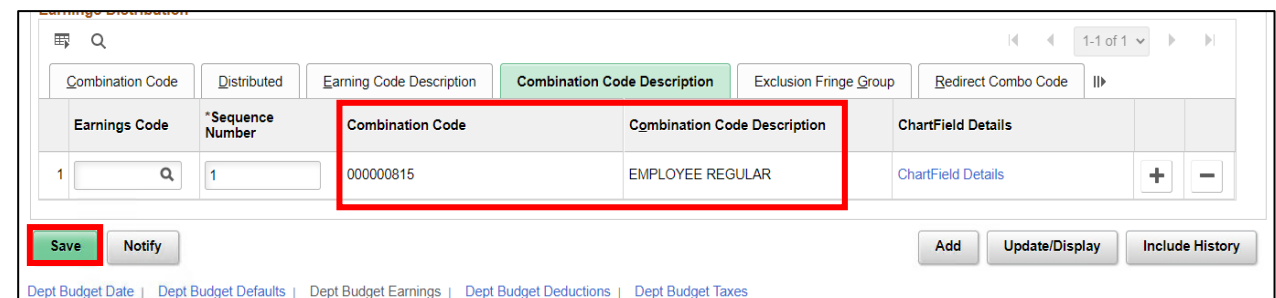
Search by ChartFields

|                  |                      |                 |                      |              |                      |
|------------------|----------------------|-----------------|----------------------|--------------|----------------------|
| Fund Code        | G4001                | Source Type     | <input type="text"/> | ChartField 2 | <input type="text"/> |
| Department       | PR08010000           | Category        | <input type="text"/> | ChartField 3 | <input type="text"/> |
| Account          | 5001100000           | Subcategory     | <input type="text"/> | Product      | <input type="text"/> |
| Grant            | NO-GRANT             | Fund Affiliate  | <input type="text"/> |              |                      |
| PC Business Unit | <input type="text"/> | Grant Affiliate | <input type="text"/> |              |                      |
| Project          | <input type="text"/> | Affiliate       | <input type="text"/> |              |                      |
| Activity         | <input type="text"/> | ChartField 1    | <input type="text"/> |              |                      |

Search Clear Cancel

Combination Code / ChartFields

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



Earnings Code

| Combination Code | Distributed      | Earning Code Description | Combination Code Description | Exclusion Fringe Group | Redirect Combo Code |
|------------------|------------------|--------------------------|------------------------------|------------------------|---------------------|
| Earnings Code    | *Sequence Number | Combination Code         | Combination Code Description | ChartField Details     |                     |
| 1                | 1                | 000000815                | EMPLOYEE REGULAR             | ChartField Details     |                     |

Save Notify

Add Update/Display Include History

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

# 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.

Department Budget Table USA

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

Set ID: MDC Department: PR08000000 HUMAN RESOURCES Fiscal Year: 2022  
Budget Begin Date: 10/01/2021 Budget End Date: 09/30/2022 Offset Group: MDC  
Default Funding Source Option: Distrib over Actual Earnings

Level: Department Position Pool Jobcode Position Appointment  
Position Number: 59000759 HRIS Technician  
Effective Date: 11/15/2021 Eff Seq: 0 Status: Active Date Entered: 03/04/2022

Deduction Distribution

| Plan Type | Plan | Deduction Code | Deduction Class | Sequence Number | Combination Code | Override | Funding End Date | Fiscal Year Budget Amount | Distribution % |
|-----------|------|----------------|-----------------|-----------------|------------------|----------|------------------|---------------------------|----------------|
| 1         |      |                |                 | 1               | 000000815        |          |                  |                           | 100.000        |

Save Notify Add Update/Display Include History

Department Budget Table USA

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

Set ID: MDC Department: PR08000000 HUMAN RESOURCES Fiscal Year: 2022  
Budget Begin Date: 10/01/2021 Budget End Date: 09/30/2022 Offset Group: MDC  
Default Funding Source Option: Distrib over Actual Earnings

Level: Department Position Pool Jobcode Position Appointment  
Position Number: 59000759 HRIS Technician  
Effective Date: 11/15/2021 Eff Seq: 0 Status: Active Date Entered: 03/04/2022

Tax Distribution

| State | Tax Class | Locality | Sequence Number | Combination Code | Override | Funding End Date | Fiscal Year Budget Amount | Distribution % |
|-------|-----------|----------|-----------------|------------------|----------|------------------|---------------------------|----------------|
| 1     |           |          | 1               | 000000815        |          |                  |                           | 100.000        |

Save Notify Add Update/Display Include History

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 Number** 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            |
|---------------------|------------------------------|
| 2025                | FY 24-25 (10/1/24– 9/30/25)  |
| 2026                | FY 25-26 (10/1/25 – 9/30/26) |
| 2027                | FY 26-27 (10/1/26 – 9/30/27) |

# 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**.

The screenshot displays the 'Department Budget Table USA' interface, specifically the 'Dept Budget Earnings' tab. The page is divided into several sections:

- Header:** 'Human Resources (HCM)' and 'Department Budget Table USA'.
- Tabs:** 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings' (highlighted with a red box), and 'Dept Budget Deductions'.
- Form Fields:**
  - Set ID, MDC, Department (CH00000000), COMM ACTION & HUMAN SRVC. DPT., Fiscal Year (2021).
  - Budget Begin Date (10/01/2020), Budget End Date (09/30/2021), Offset Group (MDC).
  - Default Funding Source Option (Distrib over Actual Earnings).
  - Budget Cap (Per Budget Level, Per Earn/Tax/Ded).
- Level Section:**
  - Position Number (00000881), SOCIAL WORKER AIDE, Eff Seq (0), Status (Active), Date Entered (02/17/2022).
  - \*Effective Date (06/28/2021) is highlighted with a red box.
  - Budget Level Cap (9,999,999,999.00).
  - \*Currency (USD).
- Earnings Distribution Section:**
  - Table with columns: Earnings Code, Sequence Number, Combination Code, Funding End Date, Fiscal Year Budget Amount, Distribution %.
  - Row 1: Earnings Code (1), Sequence Number (1), Combination Code (000000199), Funding End Date, Fiscal Year Budget Amount, Distribution % (100.000) is highlighted with a red box.
- Buttons:** Save, Return to Search, Notify, Add, Update/Display, Include History.

# 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.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Deductions' tab is active. The 'Level' section shows 'Department' selected. The 'Deduction Distribution' section has the 'Combination Code Description' tab selected. A table lists deduction items, with the first item having a 'ChartField Details' link highlighted in a red box. The table columns include Plan Type, Plan, Deduction Code, Deduction Class, Sequence Number, Combination Code, Combination Code Description, and ChartField Details.

| Plan Type | Plan | Deduction Code | Deduction Class | Sequence Number | Combination Code | Combination Code Description | ChartField Details                 |
|-----------|------|----------------|-----------------|-----------------|------------------|------------------------------|------------------------------------|
| 1         |      |                |                 | 1               | 000000199        | EMPLOYEE REGULAR             | <a href="#">ChartField Details</a> |



# 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.

The screenshot shows the 'ChartField Common Component' dialog box. The 'ChartField Details' section has a 'Combination Code' field with the value '000000200' and a search button. Below this is a table with columns: Fund Code, Department, Account, Grant, PC Business Unit, Project, Activity, Source Type, Category, and Subcategory. The table contains one row with values: SC001, CH01010101, 500110000, NO-GRANT, and several empty fields. At the bottom, there are 'Ok' and 'Cancel' buttons. The 'Ok' button is highlighted with a red box.

The screenshot shows the 'Department Budget Table USA' interface. It has tabs for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings', and 'Dept Budget Deductions'. The 'Dept Budget Earnings' tab is active. It displays various fields including Set ID, MDC, Department, Budget Begin Date, Budget End Date, Default Funding Source Option, and Distribute over Actual Earnings. Below this is a 'Level' section with fields for Position Number, Effective Date, Budget Level Cap, Position, Jobcode, Position Pool, Appointment, Status, Date Entered, and Currency. The 'Earnings Distribution' section shows a table with columns: Earnings Code, Number, Combination Code, Combination Code Description, Exclusion Fringe Group, Redirect Combo Code, and ChartField Details. The table has one row with values: 1, 1, 000000200, EMPLOYEE REGULAR, and several empty fields. The 'Number' and 'Combination Code' fields are highlighted with a red box. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'.

# 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.

**Human Resources (HCM) Department Budget Table USA**

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

Set ID: MDC Department: CH00000000 COMM.ACTION & HUMAN SRVC. DPT. Fiscal Year: 2021  
Budget Begin Date: 10/01/2020 Budget End Date: 09/30/2021 Offset Group: MDC  
Default Funding Source Option: Distrib over Actual Earnings

**Level** | 1 of 2 | View All

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

Position Number: 00000881 SOCIAL WORKER AIDE  
Effective Date: 06/26/2021 Eff Seq: 0 Status: Active Date Entered: 02/17/2022

**Tax Distribution** | 1-1 of 1 | View All

| State | Tax Class | Locality | *Sequence Number | Combination Code | Override | Funding End Date | Fiscal Year Budget Amount | Distribution % |
|-------|-----------|----------|------------------|------------------|----------|------------------|---------------------------|----------------|
| 1     |           |          | 1                | 000000200        |          |                  |                           | 100.000        |

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

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

# 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**.

**Tax Distribution**

Combination Code Locality Description Combination Code Description Distributed

| State | Tax Class | Locality | *Sequence Number | Combination Code | Override | Funding End Date | Fiscal Year Budget Amount | Distribution % |
|-------|-----------|----------|------------------|------------------|----------|------------------|---------------------------|----------------|
| 1     |           |          | 1                | 000000200        |          |                  |                           | 100.000        |

Save Return to Search Notify Add Update/Display Include History

[Dept Budget Date](#) | [Dept Budget Defaults](#) | [Dept Budget Earnings](#) | [Dept Budget Deductions](#) | [Dept Budget Taxes](#)

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.

**Tax Distribution**

Combination Code Locality Description **Combination Code Description** Distributed

| State | Tax Class | Locality | *Sequence Number | Combination Code | ChartField Details                 | Combination Code Description |
|-------|-----------|----------|------------------|------------------|------------------------------------|------------------------------|
| 1     |           |          | 1                | 000000199        | <a href="#">ChartField Details</a> | EMPLOYEE REGULAR             |

Save Return to Search Notify Add Update/Display Include History

# 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

ChartField Common Component

ChartField Details

Combination Code: 000000200

Search Options

Combination Codes

Search

ChartField Detail

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

Ok Cancel

Human Resources (HCM) Department Budget Table USA

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

Set ID MDC Department CH00000000 COMM ACTION & HUMAN SRVC DPT. Fiscal Year 2021  
Budget Begin Date 10/01/2020 Budget End Date 09/30/2021 Offset Group MDC  
Default Funding Source Option Distrib over Actual Earnings

Level

Department Position Pool Jobcode Position Appointment

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

Tax Distribution

| Combination Code | Locality Description | Combination Code Description | Distributed |
|------------------|----------------------|------------------------------|-------------|
| 000000200        |                      | EMPLOYEE REGULAR             |             |

Save Return to Search Notify Add Update/Display Include History

# 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

The screenshot displays the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Defaults', 'Dept Budget Earnings', 'Dept Budget Deductions', and 'Dept Budget Taxes'. Below these, a summary section shows 'Set ID: MDC', 'Department: CH00000000', 'COMM ACTION & HUMAN SRVC. DPT.', 'Fiscal Year: 2021', 'Budget Begin Date: 10/01/2020', 'Budget End Date: 09/30/2021', 'Offset Group: MDC', and 'Default Funding Source Option: Distrib over Actual Earnings'.

The main section is titled 'Level' and contains two records for 'SOCIAL WORKER AIDE'. Each record has a 'Position Number' of 00000881, 'Eff Seq' of 0, and 'Status' of 'Active'. The first record has an 'Effective Date' of 06/28/2021 and a 'Date Entered' of 02/17/2022. The second record has an 'Effective Date' of 10/01/2020 and a 'Date Entered' of 07/01/2021.

Below each record is a 'Tax Distribution' table. The first record's table has a 'Combination Code' of 000000200 and a 'Combination Code Description' of 'EMPLOYEE REGULAR'. The second record's table has a 'Combination Code' of 000000199 and a 'Combination Code Description' of 'EMPLOYEE REGULAR'. Both tables have a 'Sequence Number' of 1.

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

# 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            |
|---------------------|------------------------------|
| 2025                | FY 24-25 (10/1/24– 9/30/25)  |
| 2026                | FY 25-26 (10/1/25 – 9/30/26) |
| 2027                | FY 26-27 (10/1/26 – 9/30/27) |

# 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.

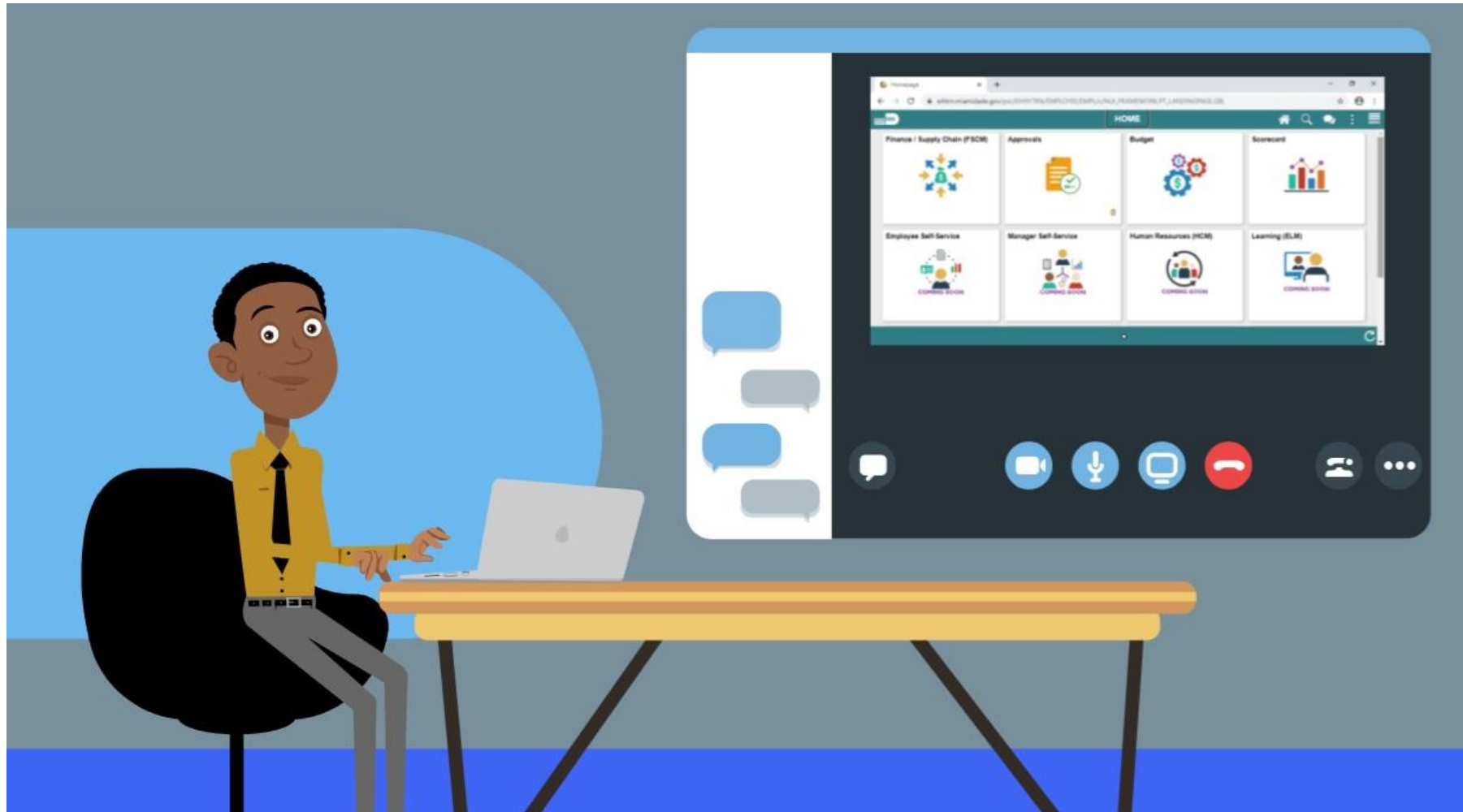
8. In the **\*Status** field, select **Inactive**.

9. Select **Save**.

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

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected. Key fields include: Set ID MDC, Department CH00000000, COMM.ACTION & HUMAN SRVC. DPT., Fiscal Year 2021, Budget Begin Date 10/01/2020, Budget End Date 09/30/2021, Offset Group MDC, Budget Cap (Per Budget Level selected), Default Funding Source Option Distrib over Actual Earnings, Position Number 00000881, \*Effective Date 08/09/2021, Eff Seq 0, \*Status Inactive, Date Entered 02/25/2022, Budget Level Cap 9,999,999.99, and \*Currency USD. The 'Earnings Distribution' table has one row: Earnings Code 1, \*Sequence Number 1, Combination Code 00000200, Combination Code Description EMPLOYEE REGULAR, and ChartField Details. The 'Save' button is highlighted in green.

# Lesson 2: Activities and Exercises





# Lesson 2: Lesson Summary

Now that you have completed the lesson, you have:

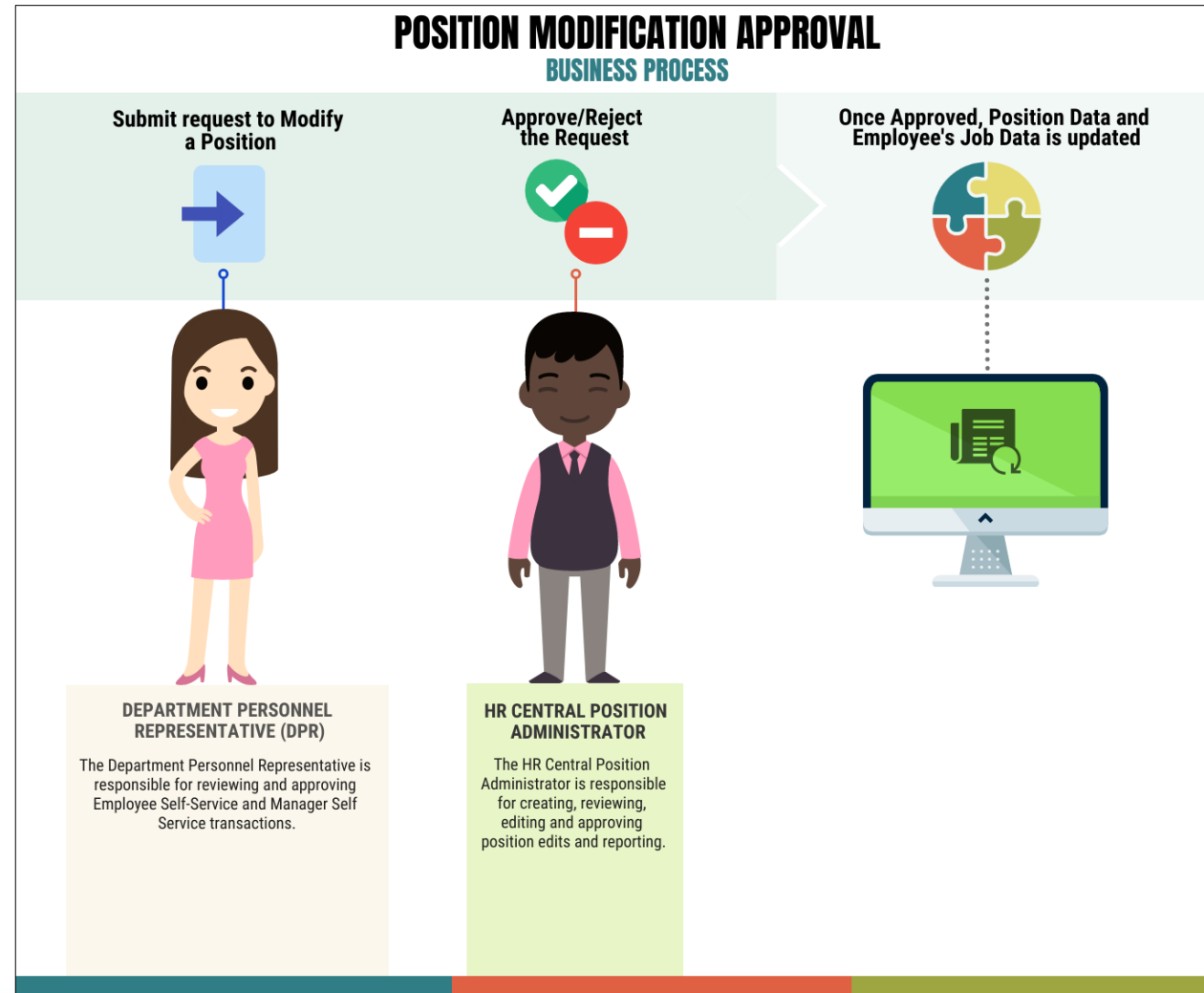
- Learned how Department budget funding is established for new positions
- Learned how to update Department budget funding on existing positions
- Learned how to inactivate Department budget funding for a position

# 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   |
|-----------------------|--|
| <b>Historical Row</b> | When a Position effective date lands in between Job effective dates, the position row is not be added. The Job record must be manually updated by the HR Position Administrator. |
| <b>Top of Stack</b>   | When the position effective date is equal to or greater than a Job's effective date, 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**.

The screenshot displays the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search form with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are two buttons: 'Search' (highlighted with a red box) and 'Clear'. On the right, the main area is titled 'View Manage/Create Position' and contains a '+ Add' button. The top navigation bar shows 'DPR Self-Service' and 'Manage/Create Position'.

# 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**.

The screenshot shows the 'Manage/Create Position' interface. On the left is a sidebar with search filters for Position Number, Description, Position Status, Reports To Position Number, Business Unit, Company, Department, Status, and Job Code. The main area displays 'View Manage/Create Position' with '1 results found'. A table lists the search results, with the first row highlighted by a red box. The table has columns: Position Number, Description, Reports To, Business Unit, Company, Department, Status, Job Code, and Current Head Count.

| Position Number | Description | Reports To | Business Unit | Company | Department | Status | Job Code | Current Head Count |
|-----------------|-------------|------------|---------------|---------|------------|--------|----------|--------------------|
| 00006777        | CLERK 3     | 00006762   | FR            | MDC     | FR00000000 | Active | 000012   | 1/1                |

The screenshot shows the 'Position Details' interface. It displays the position number 00006777, headcount status 'Filled', and current head count '1 of 1'. Below this is a table with columns: Effective Date, Effective Sequence, Reason, Business Unit, Department, Job Code, Location, Status, and Approval Chain. A red box highlights a plus (+) button located above the 'Effective Date' column header.

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

# 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.

Request Details

Cancel Continue

\*Effective Date 01/05/2022

Effective Sequence 0

Reason Code RTC Reports To Change

| Reason Code | Description  |
|-------------|--|
| FTE         | Change from Temporary to Regular   |
| INA         | Position Inactivated (Must have an effective date and <b>no incumbents in the position</b> ) |
| 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**.

**Work Location**

|                  |            |                    |   |     |                   |
|------------------|------------|--------------------|---|-----|-------------------|
| *Reg Region      | USA        | United States      | *Company                                | MDC | Miami Dade County |
| *Department      | FR00000000 | FIRE DEPARTMENT    |   |     |                   |
| Location         | FR00000056 | 9300 NW 41ST ST    |   |     |                   |
| Reports To       | 00007345   | CLERK 4            | <a href="#">View Current Incumbents</a> |     |                   |
| Supervisor Level | 12         | Supervisor Classes |   |     |                   |

**Manage Position**

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

**Step 1 of 5: Position Data**

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

**Position Information**

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

**Job Information**

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

**Work Location**

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

**Salary Plan Information**

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

Reason Code: RTC Reports To Change  
Approval Status: Not Available  
Max Head Count: 1  
Non-Mayoral: No  
\*Full/Part Time: Full-Time  
Union Code: K GSAF - OPEIU Local 100  
Short Title: CLERK 3  
Description: NATURE OF WORK: This is supervisory clerical work or independent

**Next**



# Lecture 1: Modify Position Continued

10. Review the **Additional Information** page and select **Next**.

- **NOTE:** Attachments for this process are optional.

The screenshot shows the 'Manage Position' form at Step 2 of 5: Additional Information. The left sidebar shows a progress indicator with five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main content area displays the following information: Position Number 00006777, Headcount Status Filled, Current Head Count 1 of 1. Below this, it shows Step 2 of 5: Additional Information with fields for Effective Date (01/05/2022), Effective Sequence (0), Reason Code (RTC - Reports To Change), and Approval Status (Not Available). The 'Education and Government' section includes three dropdown menus: \*Pre-Encumbrance Indicator (set to Encumber Immediately), \*Encumber Salary Option (set to Salary Step), and \*Classified Indicator (set to Classified). There is also an FTE field set to 1.000000 and an 'Add to FTE Actual Count' toggle set to Yes. At the top right, there are '< Previous' and 'Next >' buttons, with the 'Next >' button highlighted in red.

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

The screenshot shows the 'Manage Position' form at Step 3 of 5: Attachments. The left sidebar shows a progress indicator with five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main content area displays the following information: Position Number 00006777, Headcount Status Filled, Current Head Count 1 of 1. Below this, it shows Step 3 of 5: Attachments with fields for Effective Date (01/05/2022), Effective Sequence (0), Reason Code (RTC - Reports To Change), and Approval Status (Not Available). The 'Attachments' section includes a message: 'You have not added any Attachments.' and an 'Add Attachment' button. At the top right, there are '< Previous' and 'Next >' buttons, with the 'Next >' button highlighted in red.

# 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**.

**Manage Position**

Position Number: 0000777  
Headcount Status: Filled  
Current Head Count: 1 of 1

< Previous **Next** >

**Step 4 of 5: Budget Incumbents**

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

**Current Budget**

|            |       |         |       |
|------------|-------|---------|-------|
| Earnings   | 0.000 | Cdn Tax | 0.000 |
| Deductions | 0.000 | Total   | 0.00  |
| Tax        | 0.000 |         |       |

**Incumbents**

Update Incumbents: **Yes** (toggle)  
Include Salary Plan/Grade: No (toggle)  
Force Update for Title Changes: No (toggle)

**Current Incumbents**

| Name        | Empl ID  | Empl Record | Full/Part | Std Hrs/Wk | Effective Date | Action      | Action Reason | Override Position Data | Job Data                 |
|-------------|----------|-------------|-----------|------------|----------------|-------------|---------------|------------------------|--------------------------|
| Glinda King | 00198155 | 0           | Full-Time | 80.00      | 12/28/2020     | Data Change | Conversion    | N                      | <a href="#">Job Data</a> |

# 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.

**Manage Position**

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

Step 4 of 5: Budget Incumbents

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

**Current Budget**

|            |       |         |       |
|------------|-------|---------|-------|
| Earnings   | 0.000 | Cdn Tax | 0.000 |
| Deductions | 0.000 | Total   | 0.00  |
| Tax        | 0.000 |         |       |

**Incumbents**

Update Incumbents: ☒ Yes ☐ No

Include Salary Plan/Grade: ☐ No ☐ Yes

Force Update for Title Changes: ☐ No ☐ Yes

**Current Incumbents**

| Name        | Empl ID  | Empl Record | Full/Part | Std Hrs/Wk | Effective Date | Action      | Action Reason | Override Position Data | Job Data                 |
|-------------|----------|-------------|-----------|------------|----------------|-------------|---------------|------------------------|--------------------------|
| Glinda King | 00198155 | 0           | Full-Time | 80.00      | 12/28/2020     | Data Change | Conversion    | N                      | <a href="#">Job Data</a> |

**Manage Position**

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

Step 5 of 5: Review and Submit

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

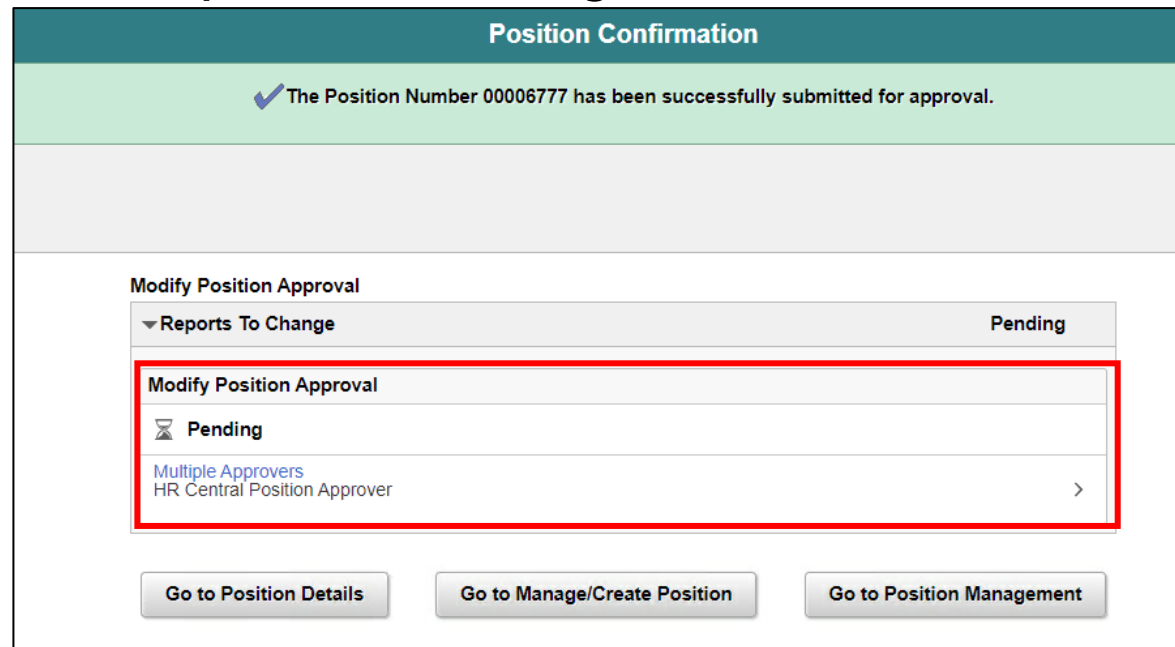
**Summary Of Changes**

| Description                | Proposed Value | Current Value |
|----------------------------|----------------|---------------|
| Reason Code                | RTC            | CNV           |
| Action Date                | 2022-01-10     | 2014-10-30    |
| Reports To Position Number | 00007345       | 00006762      |

# 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.

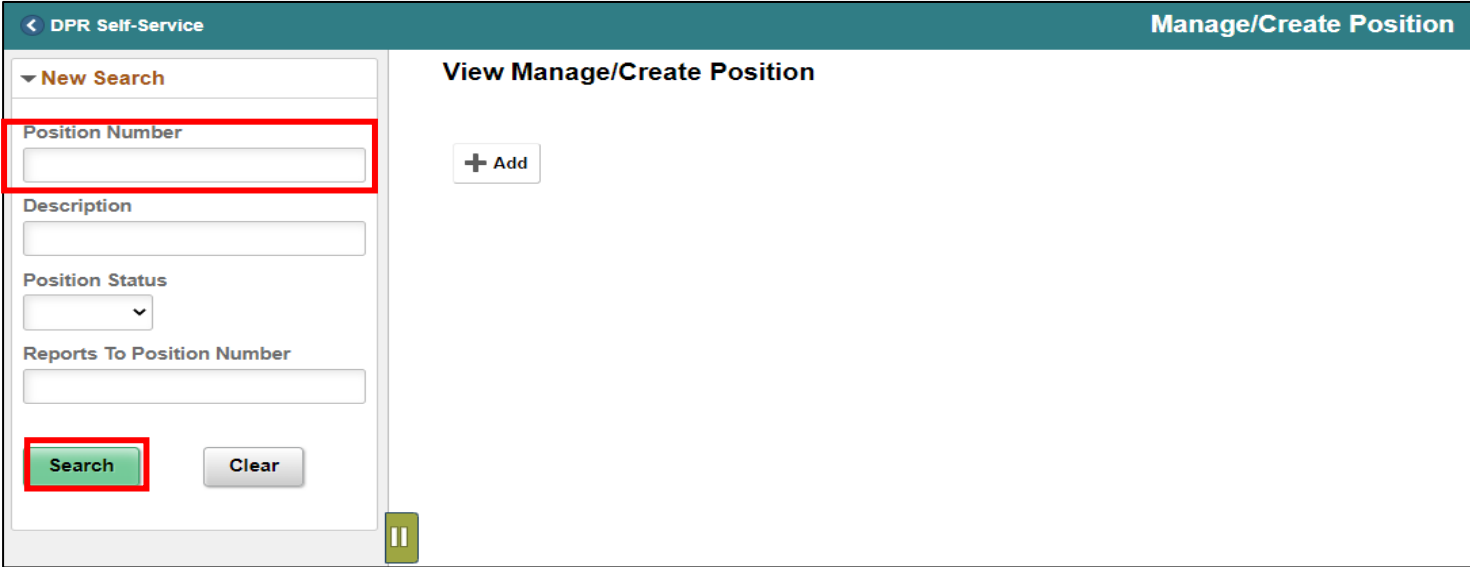


The screenshot displays the 'Position Confirmation' interface. At the top, a teal header bar contains the title 'Position Confirmation'. Below this, a light green banner features a checkmark icon and the text: 'The Position Number 00006777 has been successfully submitted for approval.' The main content area is divided into sections. A grey bar labeled 'Modify Position Approval' contains a dropdown menu 'Reports To Change' and a 'Pending' status indicator. Below this, a red rectangular box highlights a section titled 'Modify Position Approval' which includes a clock icon, the word 'Pending', the text 'Multiple Approvers' in blue, 'HR Central Position Approver', and a right-pointing chevron. At the bottom of the screen, three buttons are visible: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

# Lecture 2: Validating Modification Request

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

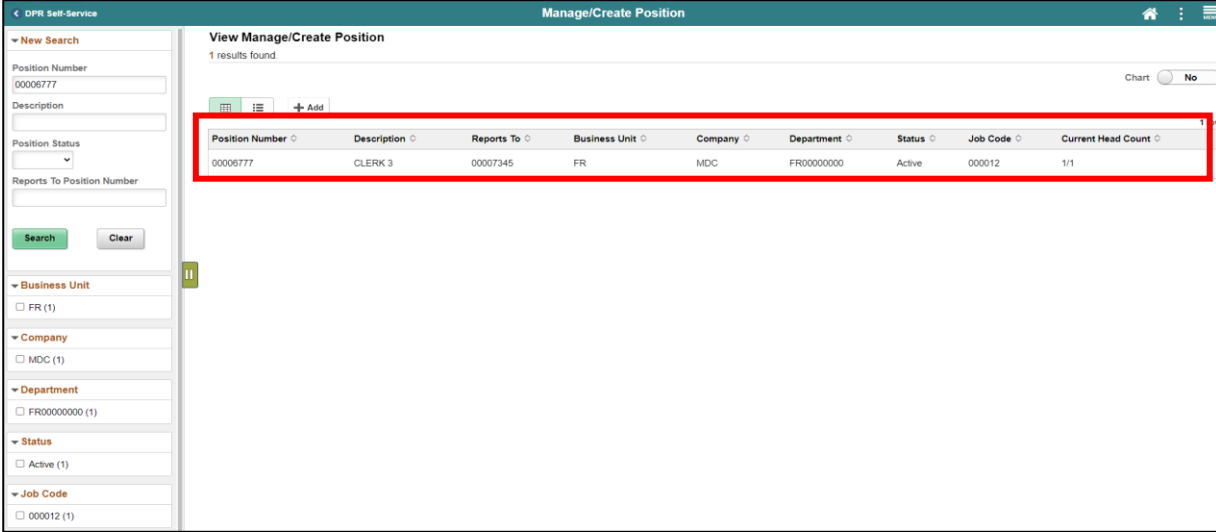
1. In the **Position Number** field, enter the **position number** being modified.
2. Select **Search**.



The screenshot shows the 'DPR Self-Service' interface with the 'Manage/Create Position' tab selected. On the left, there is a search form with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' (highlighted with a red box) and 'Clear' buttons. On the right, the 'View Manage/Create Position' section is empty, featuring a '+ Add' button. A small green icon is visible at the bottom right of the search form.


# 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.



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

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

The screenshot shows the 'Position Details' page for Position Number 00006777. It displays a table of position activities with 2 rows. The first row is highlighted in red:

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

# 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.

The screenshot displays the 'View Position' page with the following details:

- Position Information:**
  - Effective Date: 01/05/2022
  - Effective Sequence: 0
  - Reason: RTC Reports To Change
  - Approval Status: Approved
  - Position Status: Approved
  - Status: Active
  - Action Date: 01/05/2022
  - Key Position: No
  - Budgeted Position: Yes
  - Senior Management: No
  - Max Head Count: 1
  - Status Date: 10/29/2014
  - Job Sharing Permitted: No
  - Non-Mayoral: No
- Job Information:**
  - Business Unit: FR
  - Job Code: 000012
  - Regular/Temporary: Regular
  - Regular Shift: Not Applicable
  - Title: CLERK 3
  - Fire Rescue
  - Clerk 3
  - Manager Level: All Other Positions
  - Full/Part Time: Full-Time
  - Union Code: K
  - Share Title: CLERK 3
  - GSAA - OPEIU Local 100
  - NATURE OF WORK: This is supervisory clerical work or independent clerical work of
- Work Location:**
  - Reg Region: USA
  - Department: FR00000000
  - Location: FR00000000
  - Reports To: 0007345
  - Supervisor LVL: 12
  - United States
  - FIRE DEPARTMENT
  - 8000 NW 41ST ST
  - CLERK 4
  - View Current Incumbents
  - Supervisor Classes
  - Company: MDC
  - Dot-Line
  - Security Clearance
  - Miami Dade County
- Salary Plan Information:**
  - Pay Plan
  - Salary Admin Plan: STEP
  - Standard Hours: 80.00
  - Work Period: B
  - Grade: TS
  - Step
  - Mon Tue Wed Thu Fri Sat Sun
  - Biweekly

Navigation links at the bottom: > USA, > Specific Information, > Education and Government, > Budget and Incumbents, > Summary of Changes, > Attachments.

# 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**.

The screenshot shows the 'Human Resources (HCM)' interface. On the left, a sidebar contains a 'Job Information' section with a 'Job Data' tab highlighted by a red box. Below this are links for 'Workforce Job Summary' and 'Manage Employee Profile'. Further down are expandable sections for 'Headcount', 'Labor Administration', and 'HR Configuration'. The main content area is titled 'Job Data' and includes the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (active) and 'Keyword Search'. Under 'Search Criteria', the 'Empl ID' field is highlighted with a red box, showing a dropdown menu set to 'begins with' and an empty text input field. Other criteria include 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown and an input field. A 'Case Sensitive' checkbox is present. At the bottom, a 'Search' button is highlighted with a red box, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.



# 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.

The screenshot shows the 'Human Resources (HCM)' interface with the 'Job Information' tab selected. The employee's name is Glinda King, with Employee ID 00198155 and Empl Record 0. The 'Job Information Details' section shows the 'Effective Date' as 01/05/2022. The 'Reports To' section is highlighted, showing the supervisor as CLERK 4 00158740 Nola Foster. The 'Current' checkbox is checked. The 'Standard Hours' section shows 80.00 FTE, 1.000000, and Biweekly. The 'Contract Number' section is empty. The 'USA' flag is visible. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

| Effective Date | Effective Sequence | HR Status | Payroll Status | Action | Position Change | Reason | Reports To Change | Job Indicator | Primary Job |
|----------------|--------------------|-----------|----------------|--------|-----------------|--------|-------------------|---------------|-------------|
| 01/05/2022     | 0                  | Active    | Active         |        |                 |        |                   |               |             |

| Job Code | Entry Date | Supervisor Level | Supervisor ID | Reports To | Supervisor Classes |
|----------|------------|------------------|---------------|------------|--------------------|
| 000012   | 12/22/2003 | 12               |               | 00007345   |                    |

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

| Empl Class | Perm | Protected Class | SSN Protected Only |
|------------|------|-----------------|--------------------|
| Perm       |      |                 |                    |

| Regular Shift  | Not Applicable | Shift Rate |
|----------------|----------------|------------|
| Not Applicable |                |            |

| Classified Ind | Classified | Shift Factor |
|----------------|------------|--------------|
| Classified     |            |              |

| Standard Hours | Work Period | Biweekly |
|----------------|-------------|----------|
| 80.00          | B           | Biweekly |

| FTE      | Adds to FTE Actual Count? | Encumbrance Override |
|----------|---------------------------|----------------------|
| 1.000000 |                           |                      |

| Contract Number | Contract Type |
|-----------------|---------------|
|                 |               |

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

# 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.

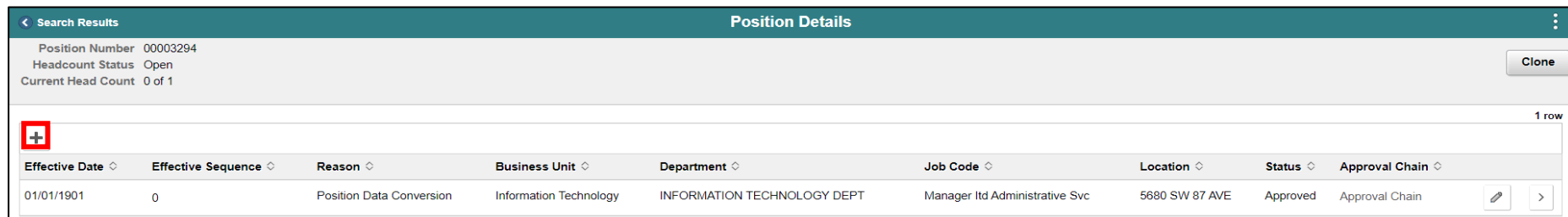
The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a 'New Search' section with input fields for 'Position Number', 'Description', 'Position Status', and 'Reports To Position Number'. The 'Position Number' field is highlighted with a red box. Below these fields are 'Search' and 'Clear' buttons. On the right, there is a '+ Add' button and a 'View Manage/Create Position' section.

The screenshot shows the search results for the position number 00003294. The results table is highlighted with a red box. The table has columns for Position Number, Description, Reports To, Business Unit, Company, Department, Status, Job Code, and Current Head Count.

| Position Number | Description                    | Reports To | Business Unit | Company | Department | Status | Job Code | Current Head Count |
|-----------------|--------------------------------|------------|---------------|---------|------------|--------|----------|--------------------|
| 00003294        | MANAGER ITD ADMINISTRATIVE SER | 00018431   | IT            | MDC     | IT00000000 | Active | 001755   | 0/1                |

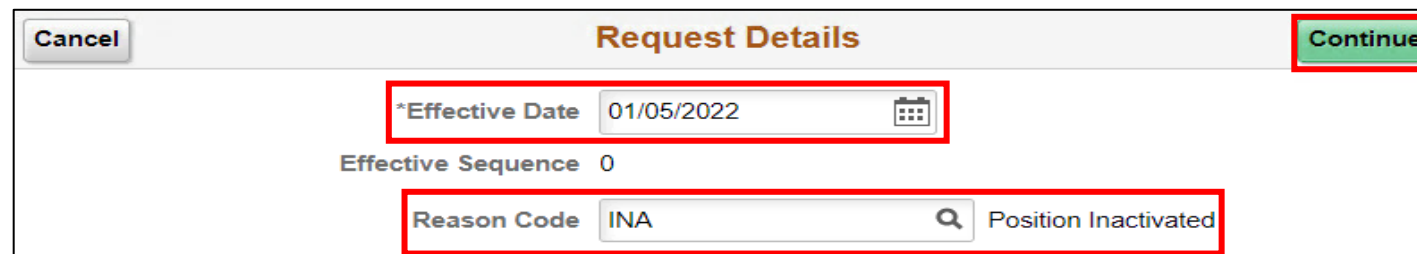
# Lecture 3: Inactivate Position Continued

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.



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

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



Cancel

Request Details

Continue

\*Effective Date

01/05/2022

Effective Sequence

0

Reason Code

INA

Position Inactivated

# 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**.

The image displays three screenshots of the 'Manage Position' system interface, illustrating the steps to inactivate a position.

**Top Screenshot: Step 1 of 5: Position Data**

- Effective Date: 01/05/2022
- Effective Sequence: 0
- Reason Code: INA - Position Inactivated
- Approval Status: Not Available
- Position Information**
  - \*Filed Status: Approved
  - \*Status: Inactive** (highlighted with a red box)
  - Budgeted Position: Yes
  - Senior Management: No
  - Max Head Count: 1
  - Non-Mayoral: No

**Bottom Screenshot: Step 2 of 5: Additional Information**

- Effective Date: 01/05/2022
- Effective Sequence: 0
- Reason Code: INA - Position Inactivated
- Approval Status: Not Available
- Education and Government**
  - \*Pre-Encumbrance Indicator: Encumber Immediately
  - \*Encumber Salary Option: Salary Step
  - \*Classified Indicator: Classified
  - FTE: 1.000000
  - Adds to FTE Actual Count: Yes

**Left Screenshot: Manage Position Overview**

- Position Number: 00003294
- Headcount Status: Open
- Current Head Count: 0 of 1
- Navigation tabs: 1 Position Data, 2 Additional Information, 3 Attachments, 4 Budget Incumbents, 5 Review and Submit
- Step 1 of 5: Position Data (Active)
- Navigation buttons: Previous, Next (highlighted with a red box)

# 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**

The screenshot displays the 'Manage Position' interface. At the top, it shows 'Position Number: 00003294', 'Headcount Status: Open', and 'Current Head Count: 0 of 1'. A navigation bar on the right includes '< Previous' and 'Next >' buttons, with the 'Next >' button highlighted by a red box. A left-hand menu lists five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited and highlighted with a green box), 4. Budget Incumbents (Not Started), and 5. Review and Submit (Not Started). The main content area is titled 'Step 3 of 5: Attachments' and shows 'Effective Date: 01/05/2022' and 'Effective Sequence: 0'. It also displays 'Reason Code: INA - Position Inactivated' and 'Approval Status: Not Available'. Below this, the 'Attachments' section states 'You have not added any Attachments.' and features an 'Add Attachment' button, which is also highlighted by a red box.

# Lecture 3: Inactivate Position Continued

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

20. Select **Next**

The screenshot displays the 'Manage Position' interface. At the top, a teal header bar contains an 'Exit' button and the title 'Manage Position'. Below the header, a grey box shows position details: 'Position Number 00003294', 'Headcount Status Open', and 'Current Head Count 0 of 1'. On the right of this box are '< Previous' and 'Next >' buttons, with the 'Next' button highlighted by a red rectangle. A left-hand navigation pane lists five steps: '1 Position Data Visited', '2 Additional Information Visited', '3 Attachments Visited', '4 Budget Incumbents Visited' (highlighted in green), and '5 Review and Submit Not Started'. The main content area is titled 'Step 4 of 5: Budget Incumbents' and contains the following information:

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

Below this is a section for 'Current Budget' with a table:

|            |       |         |       |
|------------|-------|---------|-------|
| Earnings   | 0.000 | Cdn Tax | 0.000 |
| Deductions | 0.000 | Total   | 0.00  |
| Tax        | 0.000 |         |       |

Next is the 'Incumbents' section, which includes a red-bordered box around the 'Update Incumbents' toggle set to 'No'.

Below the toggle are two options:

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

At the bottom, the 'Current Incumbents' section states 'No Incumbents to display.' A mobile menu icon is visible in the bottom right corner.

# 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.

**Manage Position**

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

Step 5 of 5: Review and Submit

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

**Summary Of Changes**

| Description                 | Proposed Value | Current Value |
|-----------------------------|----------------|---------------|
| Status as of Effective Date | I              | A             |
| Reason Code                 | INA            | CNV           |
| Action Date                 | 2022-01-10     | 2019-08-16    |
| Update Incumbents           | N              | Y             |

**Position Confirmation**

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

Modify Position Approval  
Position Inactivated Pending

Modify Position Approval  
Pending  
Multiple Approvers  
HR Central Position Approver

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

# 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.

The screenshot shows the 'Manage/Create Position' interface. On the left, there is a 'New Search' section with a 'Position Number' field (highlighted with a red box), a 'Description' field, a 'Position Status' dropdown, and a 'Reports To Position Number' field. Below these fields are 'Search' and 'Clear' buttons (the 'Search' button is highlighted with a red box). To the right of the search fields is an '+ Add' button. The main area is titled 'View Manage/Create Position'.

The screenshot shows the search results for the position number 0003294. The table has the following columns: Position Number, Description, Reports To, Business Unit, Company, Department, Status, Job Code, and Current Head Count. The first row is highlighted with a red box.

| Position Number | Description                    | Reports To | Business Unit | Company | Department | Status   | Job Code | Current Head Count |
|-----------------|--------------------------------|------------|---------------|---------|------------|----------|----------|--------------------|
| 0003294         | MANAGER (TD ADMINISTRATIVE SER | 00018431   | IT            | MDC     | IT00000000 | Inactive | 001755   | 0/1                |




# Lecture 4: Validating Inactive Position Cont'd

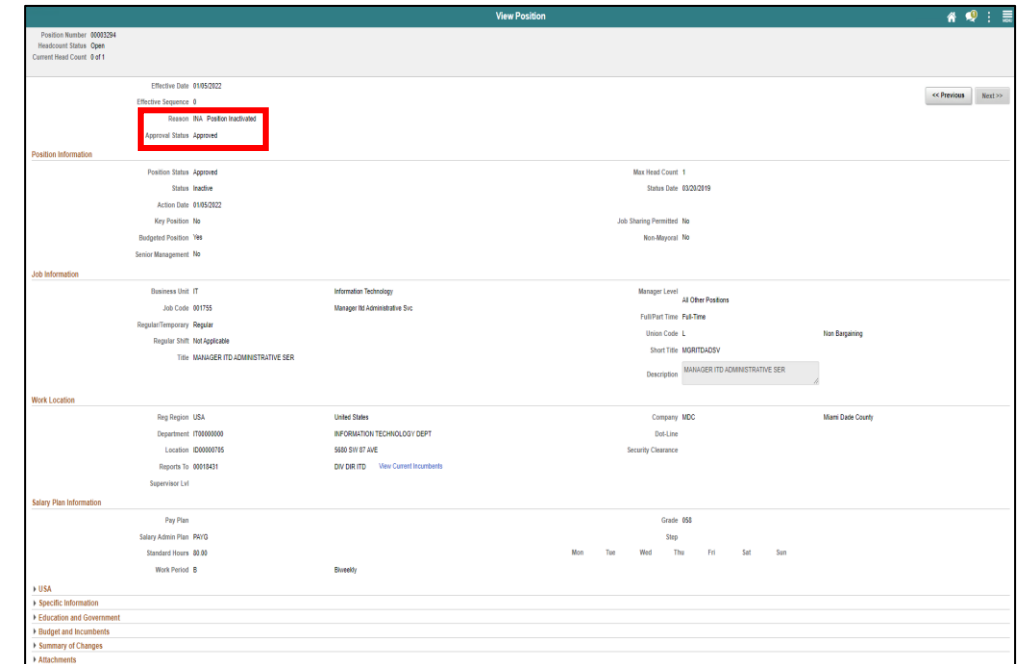
The **Position Details** page displays the position activities listed with the Effective Dates, Reason, and Status. Notice the recent request approved.

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.



| Effective Date | Effective Sequence | Reason                   | Business Unit          | Department                  | Job Code                       | Location       | Status   | Approval Chain |   |
|----------------|--------------------|--------------------------|------------------------|-----------------------------|--------------------------------|----------------|----------|----------------|---|
| 01/05/2022     | 0                  | Position Inactivated     | Information Technology | INFORMATION TECHNOLOGY DEPT | Manager Itd Administrative Svc | 5600 SW 87 AVE | Approved | Approval Chain | > |
| 01/01/1901     | 0                  | Position Data Conversion | Information Technology | INFORMATION TECHNOLOGY DEPT | Manager Itd Administrative Svc | 5600 SW 87 AVE | Approved | Approval Chain | > |



Position Number: 0003294  
Headcount Status: Open  
Current Head Count: 0 of 1

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

**Position Information**

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

**Job Information**

Business Unit: IT  
Job Code: 001755  
Regular/Temporary: Regular  
Regular Shift: Not Applicable  
Title: MANAGER ITD ADMINISTRATIVE SER

**Work Location**

Reg Region: USA  
Department: IT00000008  
Location: 0000000705  
Reports To: 00010401  
Supervisor Lvl:

**Salary Plan Information**

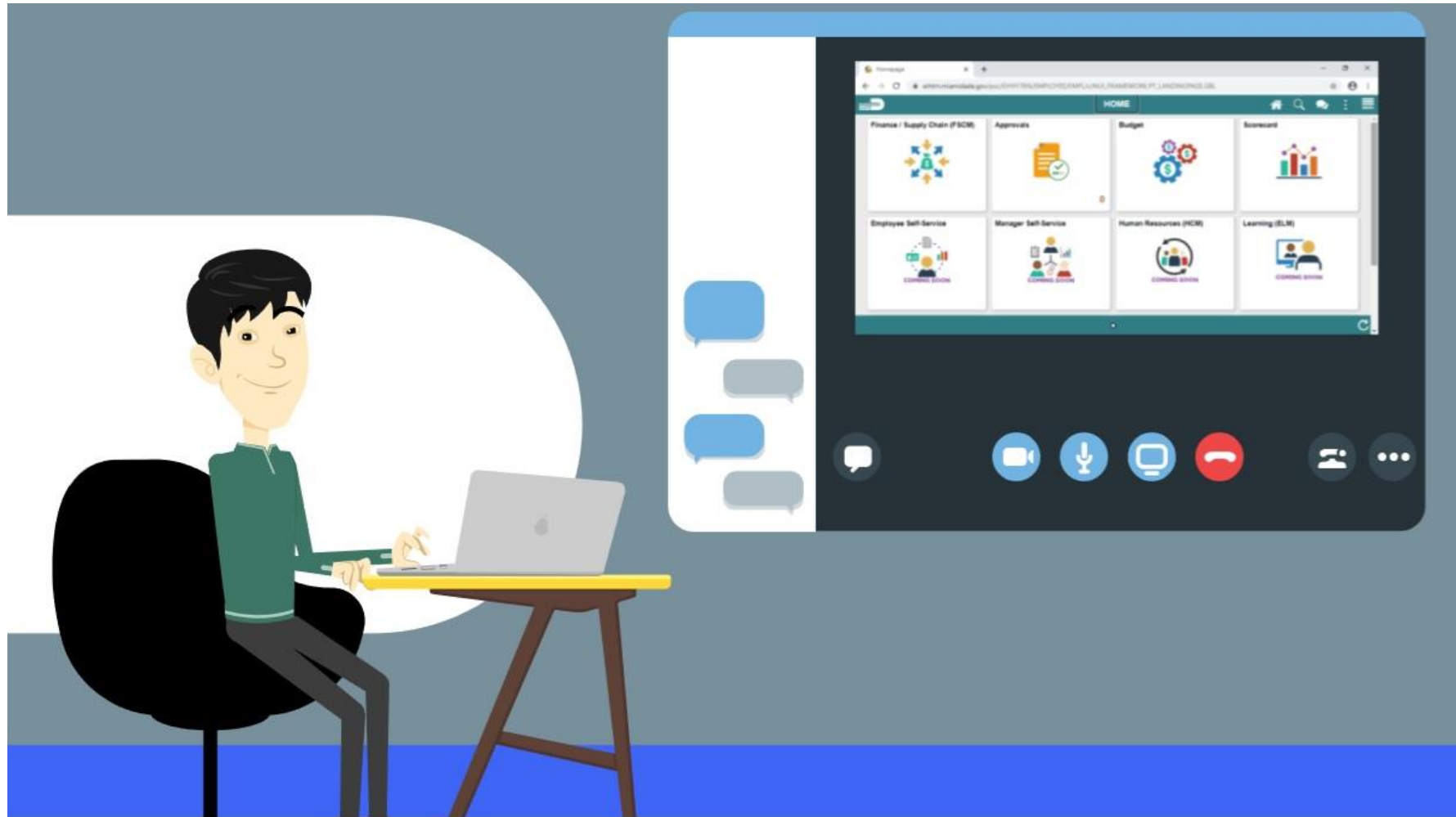
Pay Plan: Salary Admin Plan PK/G  
Standard Hours: 80.00  
Work Period: B

Grade: 050  
Step:

Mon Tue Wed Thu Fri Sat Sun

USA  
Specific Information  
Education and Government  
Budget and Incumbents  
Summary of Changes  
Attachments

# Lesson 3: Activities and Exercises



# Lesson 3: Lesson Summary

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

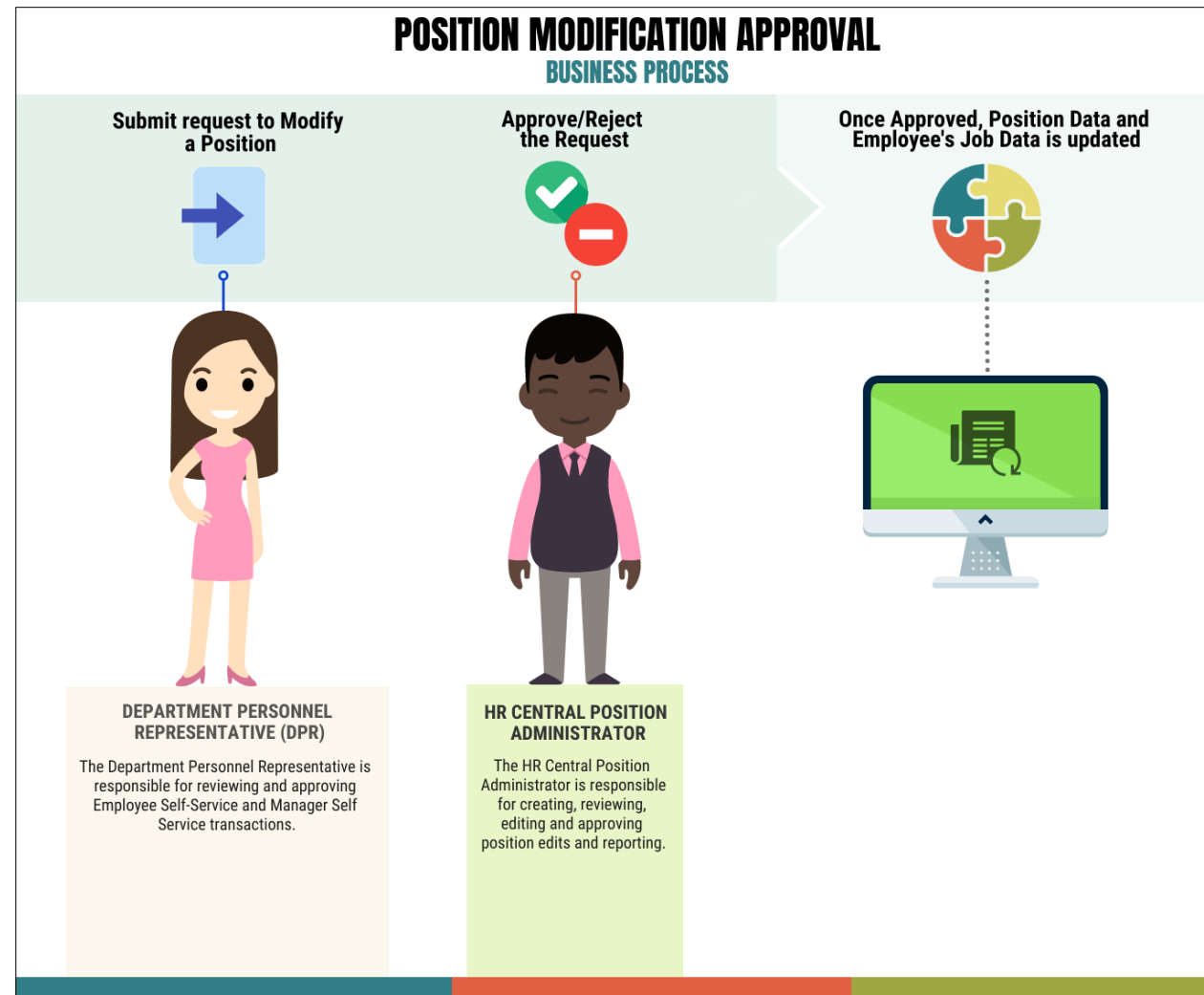
- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

# 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**.

The screenshot shows the 'DPR Self-Service' interface with the 'Manage/Create Position' tab selected. On the left, there is a search form with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. At the bottom of this form, the 'Search' button (highlighted with a red box) and a 'Clear' button are visible. To the right of the search form is a large area titled 'View Manage/Create Position' which contains a '+ Add' button. The top navigation bar includes a back arrow, 'DPR Self-Service', and the current page title 'Manage/Create Position'.

# 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

Manage/Create Position

1 results found

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

Search Results

Position Details

Position Number 00021632  
Headcount Status Filled  
Current Head Count 1 of 1

Clone

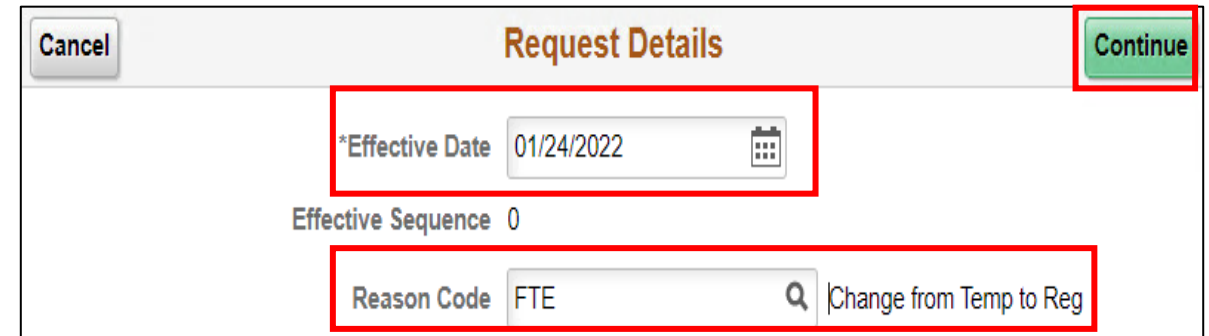
| Effective Date | Effective Sequence | Reason                   | Business Unit                 | Department               | Job Code          | Location              | Status   | Approval Chain |
|----------------|--------------------|--------------------------|-------------------------------|--------------------------|-------------------|---------------------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



# 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**.



The **Request Details** pop-up form is shown. It has a **Cancel** button on the top left and a **Continue** button on the top right. The form contains the following fields:

- \*Effective Date**: A text field with the value **01/24/2022** and a calendar icon.
- Effective Sequence**: A text field with the value **0**.
- Reason Code**: A dropdown menu with the value **FTE** and a magnifying glass icon. To the right of the dropdown is the text **Change from Temp to Reg**.



The **Job Information** form is shown. It contains the following fields:

- \*Business Unit**: A text field with the value **PR** and a magnifying glass icon. To the right is the text **Parks, Recreation & Open Spcs**.
- \*Job Code**: A text field with the value **007301** and a magnifying glass icon. To the right is the text **Recreation Leader**.
- \*Regular/Temporary**: A dropdown menu with the value **Regular**.
- \*Regular Shift**: A dropdown menu with the value **Not Applicable**.
- \*Title**: A text field with the value **RECREATION LEADER**.
- \*Full/Part Time**: A dropdown menu with the value **Full-Time**.
- Union Code**: A text field with the value **H** and a magnifying glass icon. To the right is the text **Local199 - General Employees**.
- Short Title**: A text field with the value **RECLEADER**.
- Description**: A text area with the value **NATURE OF WORK: This is specialized recreation work in planning, organization and production.**

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

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

**Manage Position**

Position Number: 00021632  
Headcount Status: Filled  
Current Head Count: 1 of 1

**Step 1 of 5: Position Data**

Effective Date: 01/24/2022  
Effective Sequence: 0  
Reason Code: FTE Change from Temp to Reg  
Approval Status: Not Available

**Position Information**

\*Filed Status:   
\*Status:   
Action Date:   
Key Position: ☐  
Budgeted Position: ☐  
Senior Management: ☐  
Max Head Count:   
Status Date:   
Job Sharing Permitted: ☐  
Non-Mayoral: ☐

**Job Information**

\*Business Unit:  Parks, Recreation & Open Spcs  
\*Job Code:  Recreation Leader  
\*Regular/Temporary:   
\*Regular Shift:   
\*Title:   
\*Full/Part Time:   
Union Code:  Local 199 - General Employees  
Short Title:   
Description:

**Work Location**

\*Reg Region:  United States  
\*Company:  Miami Dade County  
\*Department:  PARKS, REC & OPEN SPACES  
Dot-Line:   
Location:  Hickman Building - PR  
Security Clearance:   
Reports To:  RECREATION THERAPIST 2  
Supervisor Level:   
[View Current Incumbents](#)

**Salary Plan Information**

Salary Admin Plan:   
Standard Hours:   
Grade:   
Step:   
Work Period:  Biweekly

**Related Information**

[View Position](#)  
[Position History](#)

**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**

Manage Position

Position Number: 00021632  
Headcount Status: Filled  
Current Head Count: 1 of 1

Step 2 of 5: Additional Information

Effective Date: 01/24/2022  
Effective Sequence: 0  
Reason Code: FTE Change from Temp to Reg  
Approval Status: Not Available

Education and Government

Position Pool ID:   
Encumber Immediately:   
\*Pre-Encumbrance Indicator:   
\*Encumber Salary Option:   
Encumber Salary Amount: 0.000  
\*Classified Indicator: Temporary

FTE: 1.000000

Adds to FTE Actual Count: ☐ No

Related Information

View Position  
Position History

Manage Position

Position Number: 00021632  
Headcount Status: Filled  
Current Head Count: 1 of 1

Step 3 of 5: Attachments

Effective Date: 01/24/2022  
Effective Sequence: 0  
Reason Code: FTE Change from Temp to Reg  
Approval Status: Not Available

Attachments

You have not added any Attachments.

Add Attachment

Related Information

View Position  
Position History

# 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** and 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

**Manage Position**

Position Number: 00021632  
Headcount Status: Filled  
Current Head Count: 1 of 1

**Step 4 of 5: Budget Incumbents**  
Effective Date: 01/24/2022  
Reason Code: FTE - Change from Temp to Reg  
Effective Sequence: 0  
Approval Status: Not Available

**Current Budget**  
Earnings: 0.000  
Deductions: 0.000  
Tax: 0.000  
Cdn Tax: 0.000  
Total: 0.00

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

**Current Incumbents**  
1 row

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

**Manage Position**

Position Number: 00021632  
Headcount Status: Filled  
Current Head Count: 1 of 1

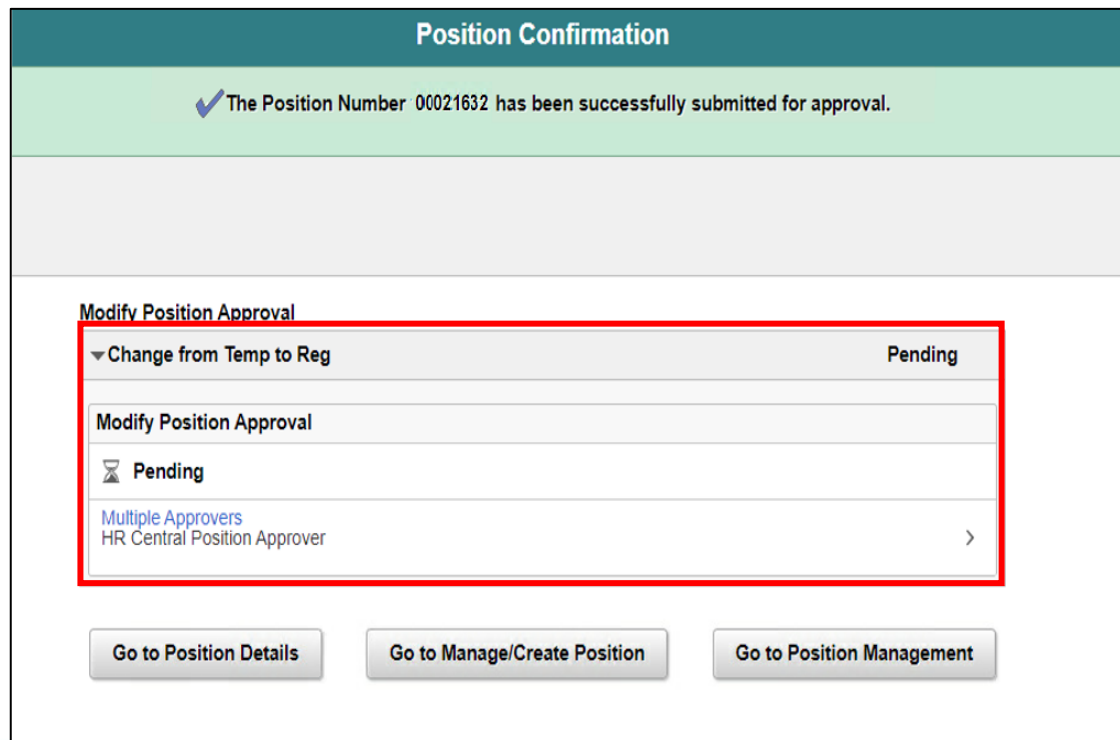
**Step 5 of 5: Review and Submit**  
Effective Date: 01/24/2022  
Reason Code: FTE - Change from Temp to Reg  
Effective Sequence: 0  
Approval Status: Not Available

**Summary of Changes**

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

# 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.



The screenshot displays the 'Position Confirmation' interface. At the top, a teal header bar contains the title 'Position Confirmation'. Below this, a light green banner features a checkmark icon and the text: '✓ The Position Number 00021632 has been successfully submitted for approval.' The main content area is white and contains a section titled 'Modify Position Approval' in red text. This section is enclosed in a red rectangular box. Inside the box, there is a dropdown menu labeled 'Change from Temp to Reg' with the status 'Pending' to its right. Below the dropdown, the text 'Modify Position Approval' is displayed. Underneath, there is a clock icon followed by the word 'Pending'. At the bottom of the box, the text 'Multiple Approvers' is shown in blue, followed by 'HR Central Position Approver' and a right-pointing arrow. Below the red box, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

# 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.

The screenshot shows the 'Human Resources (HCM)' interface. On the left, a sidebar contains a 'Job Information' section with a 'Job Data' tab highlighted in green. Below this are links for 'Workforce Job Summary' and 'Manage Employee Profile'. Further down are sections for 'Headcount', 'Labor Administration', and 'HR Configuration'. The main content area is titled 'Job Data' and includes a subtitle: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (active) and 'Keyword Search'. Under 'Search Criteria', there are several search fields: 'Empl ID' (with a dropdown set to 'begins with'), 'Empl Record' (with a dropdown set to '='), 'Name' (with a dropdown set to 'begins with'), 'Last Name' (with a dropdown set to 'begins with'), 'Second Last Name' (with a dropdown set to 'begins with'), 'Alternate Character Name' (with a dropdown set to 'begins with'), and 'Middle Name' (with a dropdown set to 'begins with'). A 'Case Sensitive' checkbox is also present. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

# 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.

The screenshot shows the 'Job Information' tab in the HR Administration system. The left sidebar contains navigation links: Job Information, Workforce Job Summary, Manage Employee Profile, Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Job Information Details' and shows the following information:

- Employee:** Kristy Hobbs, Empl ID: 00312190, Empl Record: 0
- Job Information Details:**
  - Effective Date: 01/24/2022
  - Effective Sequence: 1
  - HR Status: Active
  - Payroll Status: Active
  - Action: Position Change
  - Reason: Change from Temp to Reg
  - Job Code: 007301
  - Entry Date: 05/29/2020
  - Supervisor Level: 13
  - Reports To: 00010839
  - Regular/Temporary: Regular (highlighted with a red box)
  - Regular Shift: Not Applicable
  - Classified Ind: Classified
  - Recreation Leader: RECREATION THERAPIST 2 - 00310945 Isadora Garica
  - Non-Supervisory
  - \*Protected Class: (highlighted with a red box)
- Standard Hours:**
  - Standard Hours: 80.00 (highlighted with a red box)
  - FTE: 1.000000 (highlighted with a red box)
  - Work Period: B Biweekly
  - Encumbrance Override: ☐
- Contract Number:** (empty field)
- Contract Type:** (empty field)
- USA** (country selection)

At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'. The footer shows the navigation path: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation.

# 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**.

The screenshot shows the 'HR Administration' interface for 'Kristy Hobbs' (Employee ID 00312190). The 'Work Location' tab is selected. The 'Effective Date' is set to 01/24/2022. The 'Effective Sequence' is 1. The 'HR Status' is 'Active' and 'Payroll Status' is 'Active'. The 'Position Number' is 00021632, titled 'RECREATION LEADER'. The 'Position Entry Date' is 05/26/2020. The 'Regulatory Region' is 'USA', 'Company' is 'MDC', 'Business Unit' is 'PR', and 'Department' is 'PR00000000'. The 'Department Entry Date' is 05/26/2020, 'Location' is 'DSD3030000', and 'Establishment ID' is 'MDC'. The 'Last Start Date' is 05/26/2020. The 'Expected Job End Date' is blank. The 'Action' dropdown is set to 'Position Change' and the 'Reason' dropdown is set to 'Change from Temp to Reg'. A dropdown menu is open for the 'Reason' field, showing options: 'Job Re-Classification', 'Job Re-Classification - Promot', 'Job Re-Classification - Select', 'Job Re-Classification - Title', 'New Position', 'Position Data Conversion', 'Position Data Update', 'Position Inactivated', 'Position Status Change', 'Re-Organization/Restructure', 'Reports To Change', and 'Transfer'. The 'Go To Row' button has a plus sign (+) next to it. The 'Date Created' is 01/27/2022. The bottom of the form has buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include Missing'.



# 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.

The screenshot shows the 'Job Information' tab for employee Kristy Hobbs (Empl ID 00312190). The 'Job Information Details' section is active, showing a list of job records. The first record is highlighted, showing details for a position change from temporary to regular. The 'EMPL Class' dropdown menu is open, showing 'Perm' as the selected option. Other fields include Effective Date (01/24/2022), Effective Sequence (3), HR Status (Active), Payroll Status (Leave With Pay), Job Code (007301), Entry Date (05/26/2020), Supervisor Level (13), Reports To (00010839), Regular/Temporary (Regular), Regular Shift (Not Applicable), Classified Ind (Classified), and Protected Class (SSN Protected Only).

| Effective Date | Effective Sequence | HR Status | Payroll Status | Action          | Reason                  |
|----------------|--------------------|-----------|----------------|-----------------|-------------------------|
| 01/24/2022     | 3                  | Active    | Leave With Pay | Position Change | Change from Temp to Reg |

| Job Code | Entry Date | Supervisor Level | Reports To | Regular/Temporary | EMPL Class | Regular Shift  | Classified Ind |
|----------|------------|------------------|------------|-------------------|------------|----------------|----------------|
| 007301   | 05/26/2020 | 13               | 00010839   | Regular           | Perm       | Not Applicable | Classified     |

Recreation Leader  
Non-Supervisory  
RECREATION THERAPIST 2 00310945 Isadora Garica  
Full/Part Full-Time  
Protected Class SSN Protected Only

# Lesson 4: Activities and Exercises



# Lesson 4: Lesson Summary

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

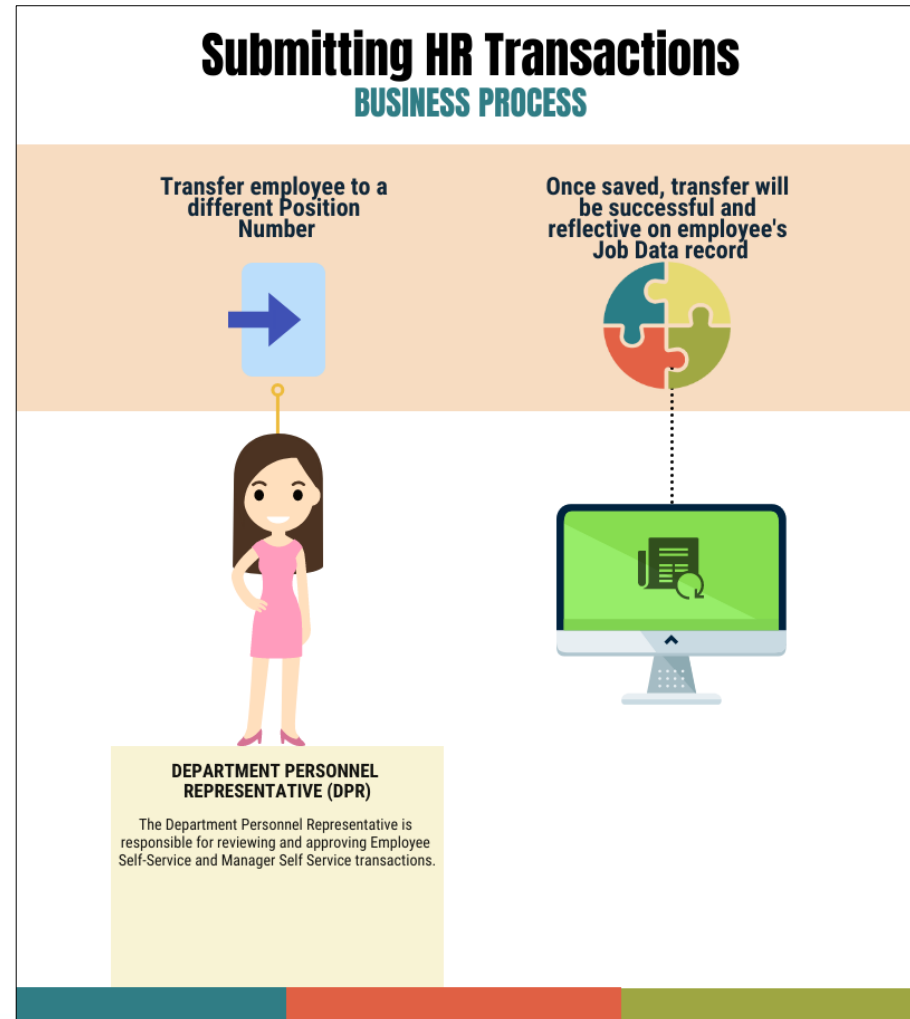
- Update a temporary employee to regular status for them to obtain benefits

# 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.

< PR Self-Service

**Position Lateral Transfer**

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

[Find an Existing Value](#)

▼ Search Criteria

Empl ID begins with ▼

Business Unit begins with ▼

First Name begins with ▼

Last Name begins with ▼

☒ Include History ☐ Correct History

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

< PR Self-Service

Mdc Empl Posn

Empl ID 00026999  
Name Mayra Beltran  
Business Unit HR Human Resources  
Department HR01020000 RECRUITMENT  
Position Number 00003260 HR PERSONNEL SERVICES SPEC  
Latest Effective Date 12/28/2020

Employee Position Data Find First 1 of 1 Last

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

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

< PR Self-Service

Mdc Empl Posn

Empl ID 00026999  
Name Mayra Beltran  
Business Unit HR Human Resources  
Department HR01020000 RECRUITMENT  
Position Number 00003262 HR PERSONNEL SERVICES SPEC  
Latest Effective Date 11/16/2021

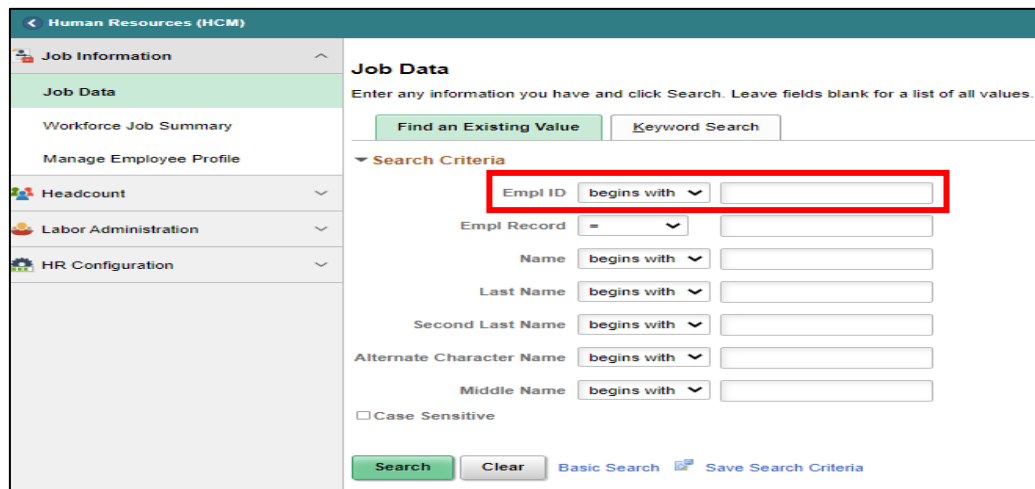
Employee Position Data Find First 1-2 of 2 Last

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



**Human Resources (HCM)**

**Job Information**

**Job Data**

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

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

**Search Criteria**

**Empl ID** begins with

**Empl Record** =

**Name** begins with

**Last Name** begins with

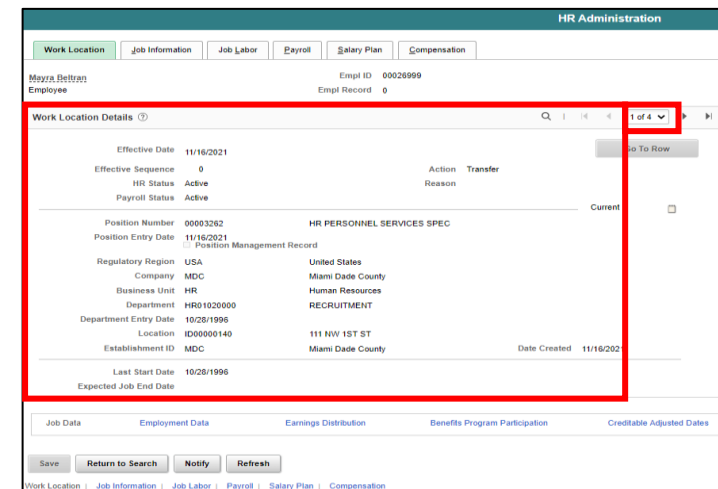
**Second Last Name** begins with

**Alternate Character Name** begins with

**Middle Name** begins with

☐ Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)



**HR Administration**

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

Mayra Beltran  
Employee

Empl ID 00026999  
Empl Record 0

**Work Location Details**

| Effective Date | Position Number | Position Entry Date | Regulatory Region | Company | Business Unit | Department | Location  | Establishment ID | Date Created |
|----------------|-----------------|---------------------|-------------------|---------|---------------|------------|-----------|------------------|--------------|
| 11/16/2021     | 00003282        | 11/16/2021          | USA               | MDC     | HR            | HR01020000 | 1020/1996 | ID0000140        | 11/16/2021   |

**HR PERSONNEL SERVICES SPEC**

**United States**  
**Miami Dade County**  
**Human Resources**  
**RECRUITMENT**

**111 NW 1ST ST**  
**Miami Dade County**

**Last Start Date** 10/28/1996  
**Expected Job End Date**

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

**Save** **Return to Search** **Notify** **Refresh**

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



# 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

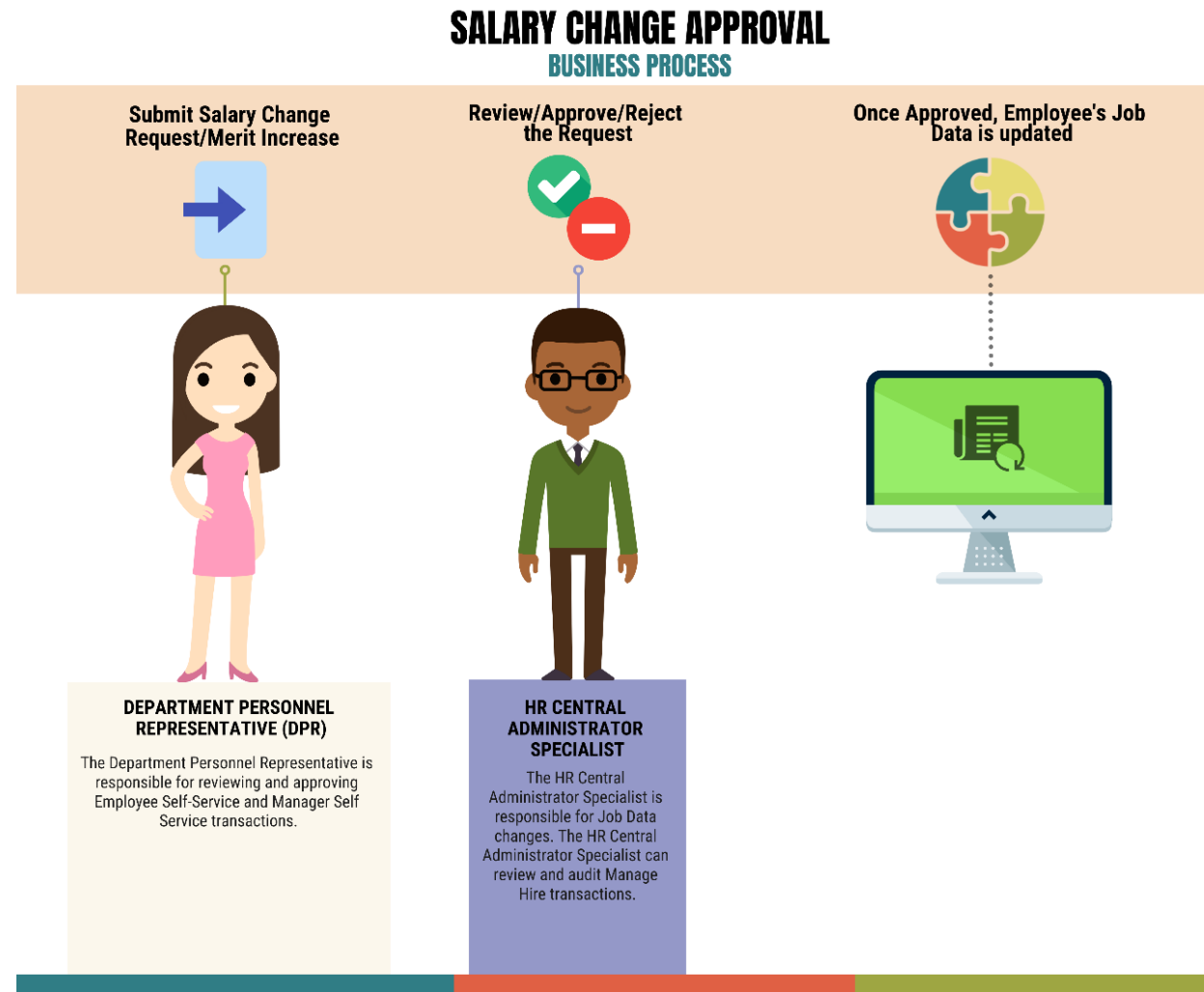
At the conclusion of this lesson, participants will be able to:

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

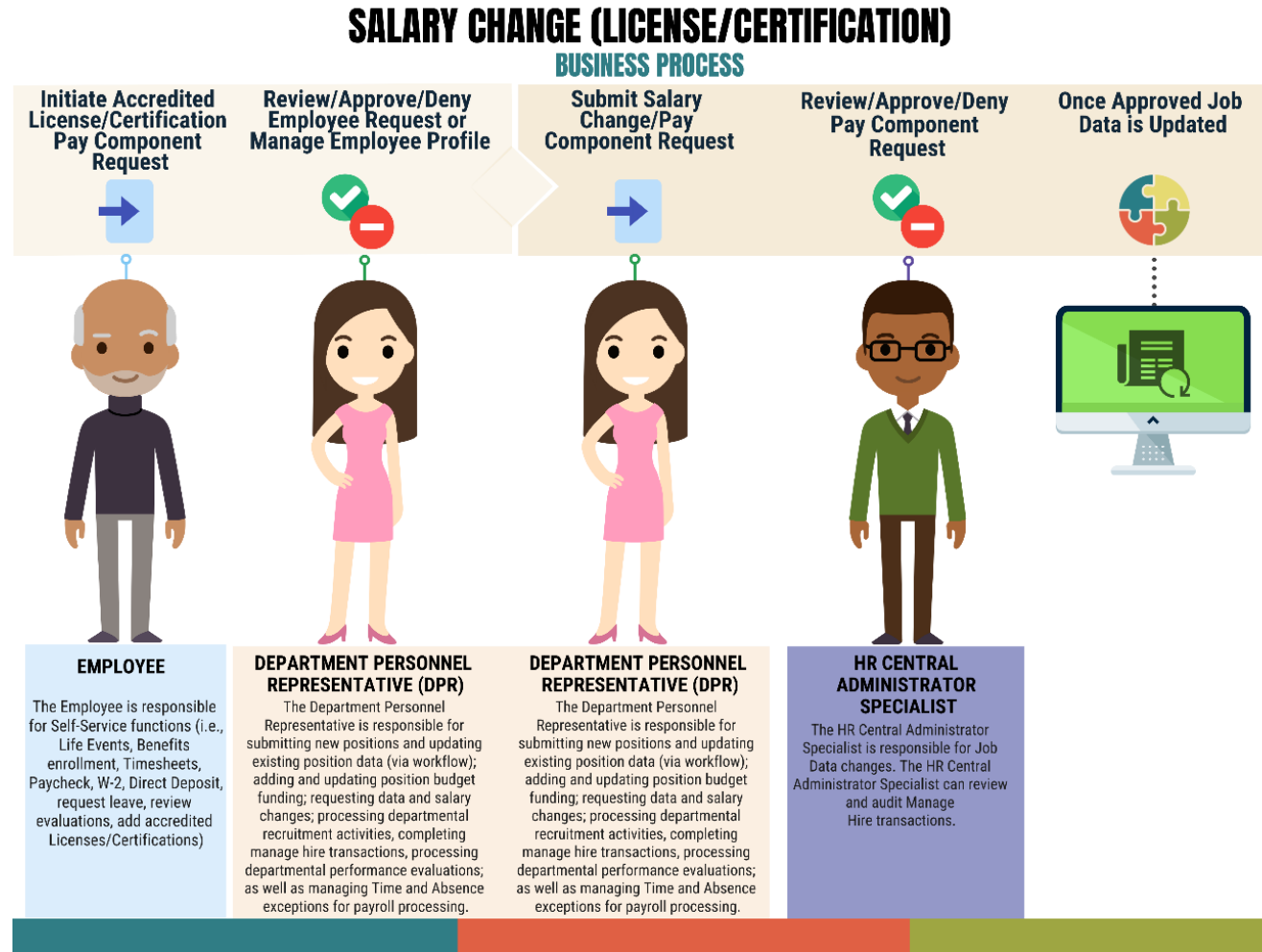
# Lesson 6: Key Terms

| Term                     | Definition   |
|--------------------------|--|
| <b>Components of Pay</b> | 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



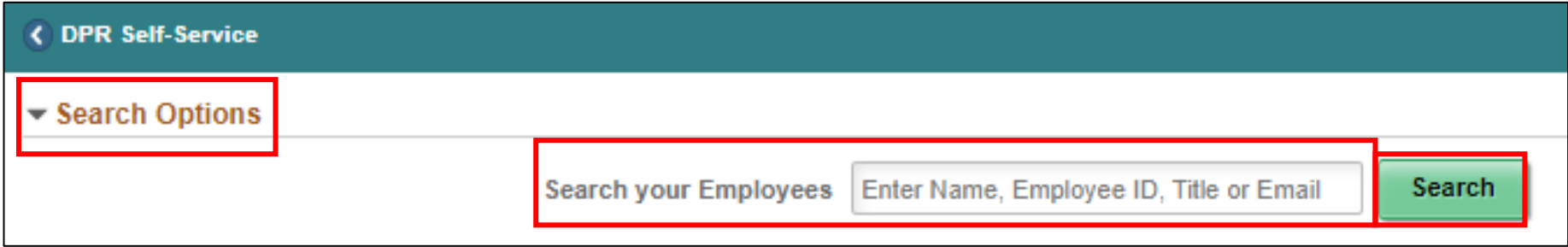
# Lesson 6: Submitting HR Salary Changes



# 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**.



The screenshot shows the 'DPR Self-Service' header. Below it, a 'Search Options' dropdown menu is highlighted with a red box. To the right, the 'Search your Employees' section is also highlighted with a red box. This section contains a text input field with the placeholder text 'Enter Name, Employee ID, Title or Email' and a green 'Search' button, both of which are individually highlighted with red boxes.

# 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.

The screenshot displays the 'DPR Salary Change' interface. The top section shows a search for employee '00218029', identifying 'Felica Krebs'. Below, a table lists employees, with 'Millie Gaskill' (Administrative Secretary, ID 00218029 - 0) highlighted. The bottom section, 'Compensation Details', shows the 'Transaction Date' set to 03/10/2022 and the 'Reason' set to 'Merit'. A table of pay components shows a 5.00% change for 'MDC Biweekly' and 'Premium Pay'. A salary range bar indicates the current salary is at the midpoint. The bottom summary shows the new biweekly salary of 1,780.78 USD and the new annual rate of 45,780.36 USD.

| Name / Title / ID - Record                                 | Status / Type      | Department                |
|--|--------------------|---------------------------|
| Millie Gaskill<br>Administrative Secretary<br>00218029 - 0 | Active<br>Employee | CSBG CENTERS - CH03010200 |

| Pay Component | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|---------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly  | 5.00%          | 80.51         | 1,690.78   | 1,610.27       | USD           | Flat Amount | Biweekly  |
| Premium Pay   |                | 70.00         | 70.00      | 70.00          | USD           | Flat Amount | Biweekly  |

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



# 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**

**DPR Salary Change**

Mille Gaskill  
Administrative Secretary

MD Compensation Detail

MD Review & Submit

Next >

Compensation Details

\*Transaction Date: 03/10/2022  
\*Reason: Merit

| Pay Component | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|---------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly  | 5.00%          | 80.51         | 1,690.78   | 1,610.27       | USD           | Flat Amount | Biweekly  |
| Premium Pay   |                | 70.00         | 70.00      | 70.00          | USD           | Flat Amount | Biweekly  |

Salary Range Bar: 33,119.00 Minimum to 91,664.24 Maximum, with a midpoint of 55,546.52. A green bar indicates the current salary range.

**New Information**

Biweekly Salary: 1,760.78 USD  
Annual Rate: 45,780.36 USD

**Current Information**

Biweekly Salary: 1,610.27 USD  
Annual Rate: 43,687.01 USD

Salary Plan

Salary Admin Plan: K  
Salary Grade: A01  
Grade Entry Date: 02/26/2007  
Step: [Search]  
Step Entry Date: [Search]

**Default Pay Components**

| *Rate Code | Seq | Comp Rate    | Currency | Frequency | Percent | Rate Code Group |
|------------|-----|--------------|----------|-----------|---------|-----------------|
| 1 MDCBLY   | 0   | 1,690.78/USD | B        |           |         |                 |
| 2 PRMPAY   | 0   | 70.00/USD    | B        |           |         |                 |

**Calculate Compensation**

# 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.

**DPR Salary Change**

Millie Gaskill  
Administrative Secretary

MD Compensation Detail MD Review & Submit

Review and Submit

Transaction Date: 03/10/2022  
Reason: Merit

New Information  
Biweekly Salary: 1,700.78 USD  
Annual Rate: 45,780.36 USD

Current Information  
1,690.27 USD  
43,687.01 USD

Comments  
Requesting 5% Merit Increase effective 3/10/2022

Attachments  
No documents have been attached.  
Add Attachment

Changes Made  
Request Filed

**Salary Increase Request**  
Your Salary Increase Request is more than 5%.  
Please attach an approved MEMO/supporting documentation from Mayoral's Office, otherwise your request will not proceed forward.

OK

**DPR Salary Change**

✓ Your transaction request for Millie Gaskill has been successfully submitted for approval.

Millie Gaskill  
Administrative Secretary

Submit Confirmation

DPR Salary Change Approval

Pending

Multiple Approvers  
Central HR approval

Comments  
Felicia Krebs at 02/10/22 - 11:27 AM  
Requesting 5% Merit Increase effective 3/10/2022

# 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**.

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' section. The 'Job Information' sidebar is on the left, and the 'Job Data' section is on the right. The 'Job Data' section has a 'Find an Existing Value' tab selected, which is highlighted with a red box. Below the tab, there are search criteria fields: 'Empl ID' (with a 'begins with' dropdown and a text input field, highlighted with a red box), 'Empl Record' (with an '=' dropdown and a text input field), 'Name' (with a 'begins with' dropdown and a text input field), 'Last Name' (with a 'begins with' dropdown and a text input field), 'Second Last Name' (with a 'begins with' dropdown and a text input field), 'Alternate Character Name' (with a 'begins with' dropdown and a text input field), and 'Middle Name' (with a 'begins with' dropdown and a text input field). At the bottom, there are checkboxes for 'Include History' and 'Case Sensitive', and a 'Search' button (highlighted with a red box) next to a 'Clear' button. There are also links for 'Basic Search' and 'Save Search Criteria'.

# 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.

The image displays two screenshots of the HR Administration interface, specifically the 'Salary Plan Details' page for employee Millie Gaskill (Empl ID: 00218029).

**Top Screenshot (Page 1 of 2):**

- The 'Salary Plan' tab is selected.
- The 'Salary Plan Details' section shows a table with the following data:

| Effective Date | Effective Sequence | HR Status | Payroll Status | Action | Pay Rate Change | Reason | Merit |
|----------------|--------------------|-----------|----------------|--------|-----------------|--------|-------|
| 03/10/2022     | 0                  | Active    | Active         |        |                 |        |       |
- The 'Future' status is highlighted in a red box.
- The 'Go To Row' button is visible.

**Bottom Screenshot (Page 2 of 2):**

- The 'Salary Plan' tab is selected.
- The 'Salary Plan Details' section shows a table with the following data:

| Effective Date | Effective Sequence | HR Status | Payroll Status | Action | Pay Rate Change | Reason | Merit |
|----------------|--------------------|-----------|----------------|--------|-----------------|--------|-------|
| 01/31/2022     | 0                  | Active    | Active         |        |                 |        |       |
- The 'Current' status is highlighted in a red box.
- The 'Go To Row' button is visible.

# 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.

HR Administration

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

Millie Gaskill Employee Empl ID 00218029 Empl Record 0

Compensation Details 1 of 2

Effective Date 03/10/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change Reason Merit

Compensation Rate 1,690.782975 USD Frequency B Biweekly

Comparative Information

Pay Rates

Default Pay Components Contract Change Prorate Option

Pay Components

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

Calculate Compensation

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

# 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.

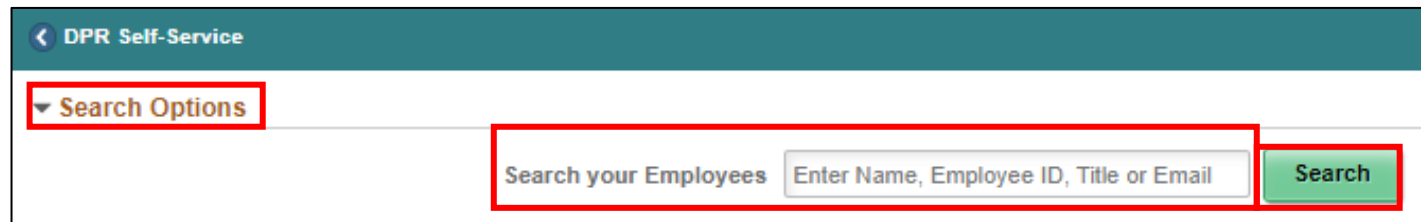
The screenshot displays the 'HR Administration' interface for 'Millie Gaskill' (Employee ID 00218029). The 'Compensation' tab is active. The 'Compensation Details' section shows the 'Effective Date' as 01/31/2022, 'Effective Sequence' as 0, 'HR Status' as Active, and 'Payroll Status' as Active. The 'Action' is 'Pay Rate Change' and the 'Reason' is 'Merit'. The 'Compensation Rate' is 1,680.27 USD, with a frequency of 'B' (Biweekly). A 'Current' label is next to the rate. Below this, the 'Pay Rates' section shows a table of compensation components.

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

# 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**

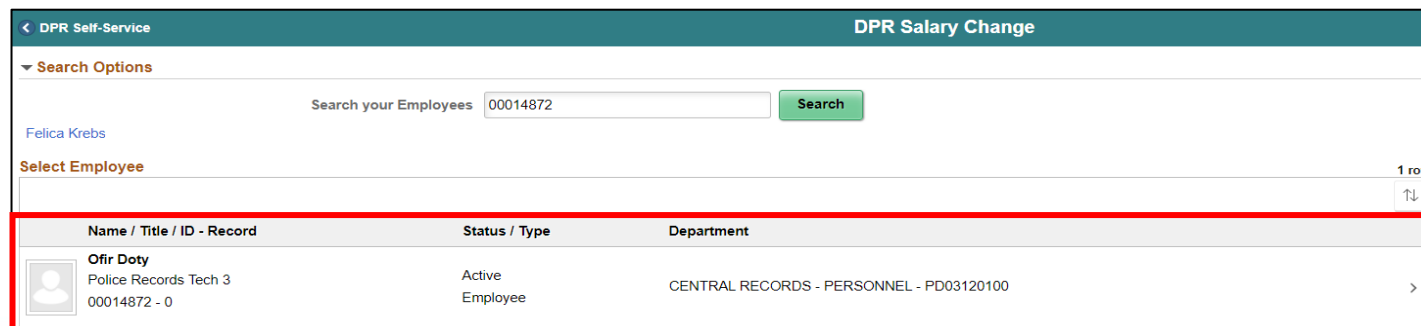


← DPR Self-Service

▼ Search Options

Search your Employees Enter Name, Employee ID, Title or Email Search

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




← DPR Self-Service DPR Salary Change

▼ Search Options

Search your Employees 00014872 Search

Felica Krebs

Select Employee

| Name / Title / ID - Record   | Status / Type      | Department                               |
|--|--------------------|--|
|  Ofir Doty<br>Police Records Tech 3<br>00014872 - 0 | Active<br>Employee | CENTRAL RECORDS - PERSONNEL - PD03120100 |

1 row

# 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**

The screenshot displays the 'DPR Salary Change' form. At the top, there are two tabs: 'MD Compensation Detail' (active) and 'MD Review & Submit'. Below the tabs, the 'Compensation Details' section contains two fields: '\*Transaction Date' (set to 01/31/2022) and '\*Reason' (set to Merit), both highlighted with red boxes. Below these fields is a table with columns: Pay Component, Change Percent, Change Amount, New Amount, Current Amount, Currency Code, Type, and Frequency. The table has two rows: 'MDC Biweekly' and 'Premium Pay'. Below the table is a salary range bar with values: 38,148.76 (Minimum), 45,109.74 (Midpoint), and 63,700.72 (Maximum). Below the bar are two sections: 'New Information' and 'Current Information', each showing 'Biweekly Salary' and 'Annual Rate'. The 'Salary Plan' section at the bottom shows 'Salary Admin Plan K', 'Salary Grade 035', and 'Grade Entry Date 01/31/1994'. The 'Step' field is set to 10 and is highlighted with a red box. The 'Step Entry Date' is 01/31/2022.

| Pay Component | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|---------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly  |                | 2,957.74      | 2,957.74   | 2,957.74       | USD           | Flat Amount | Biweekly  |
| Premium Pay   |                | 70.00         | 70.00      | 70.00          | USD           | Flat Amount | Biweekly  |

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

Salary Plan

Salary Admin Plan K      GSAF - OPEIU Local 100

Salary Grade 035      035

Grade Entry Date 01/31/1994

Step 10

Step Entry Date 01/31/2022



# 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**

**DPR Salary Change**

Exit

Offr Doty  
Police Records Tech 3

MD Compensation Detail

MD Review & Submit

Next

\*Reason: Merit

| Pay Component | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|---------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly  |                | 88.06         | 2,145.80   | 2,057.74       | USD           | Flat Amount | Biweekly  |
| Premium Pay   |                | 70.00         | 70.00      | 70.00          | USD           | Flat Amount | Biweekly  |

35,321.24 Compa-Ratio: 1.23

35,148.76 Minimum

45,109.74 Midpoint

63,703.72 Maximum

**New Information**

Biweekly Salary: 2,215.80 USD

Annual Rate: 57,610.80 USD

**Current Information**

Biweekly Salary: 2,127.74 USD

Annual Rate: 55,321.24 USD

Changes Made  
Required Field

**Salary Plan**

Salary Admin Plan: K

Salary Grade: 035

Grade Entry Date: 01/31/1994

Step: 10

Step Entry Date: 01/31/2022

**Default Pay Components**

Pay Components

2 rows

| *Rate Code | Seq | Comp Rate    | Currency | Frequency | Percent | Rate Code Group |
|------------|-----|--------------|----------|-----------|---------|-----------------|
| MDCBLY     | 0   | 2,145.80/USD | B        |           |         |                 |
| PRMPAY     | 0   | 70.00/USD    | B        |           |         |                 |

**Calculate Compensation**

# 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.

**DPR Salary Change**

Ofir Doty  
Police Records Tech 3

1 MD Compensation Detail 2 MD Review & Submit

< Previous Submit

**Review and Submit**

|                  |            |
|------------------|------------|
| Transaction Date | 01/31/2022 |
| Reason           | Merit      |

|                 | New Information | Current Information |
|-----------------|-----------------|---------------------|
| Biweekly Salary | 2,215.80 USD    | 2,127.74 USD        |
| Annual Rate     | 57,610.80 USD   | 55,321.24 USD       |

**Comments**

Requesting Merit Increase from Step 9 to Step 10 effective 01/31/22

**Attachments**

No documents have been attached.

Add Attachment

● Changes Made  
● Required Field

# 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.

< HOME **DPR Salary Change**

✓ Your transaction request for Ofir Doty has been successfully submitted for approval.

**Ofir Doty**  
Police Records Tech 3

**Submit Confirmation**

**DPR Salary Change Approval**

▼ : Pending [View/Hide Comments](#)

DPR Salary Change Approval

Pending

[Multiple Approvers](#)

Central HR approver

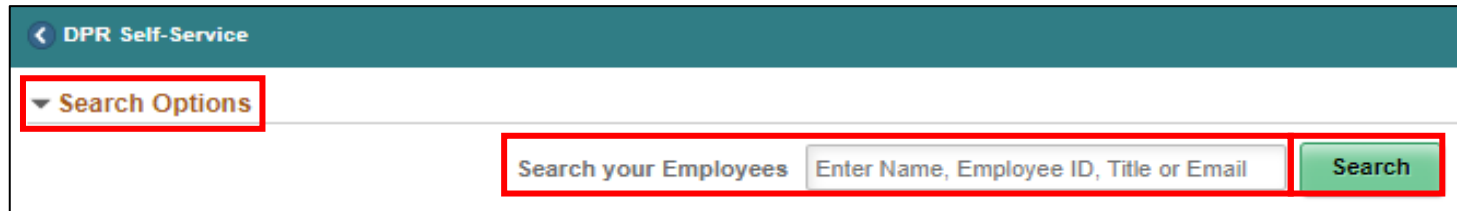
▼ **Comments**

**Felica Krebs at 01/31/22 - 2:59 PM**  
Requesting Merit Increase from Step 9 to Step 10 effective 01/31/22

# 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**

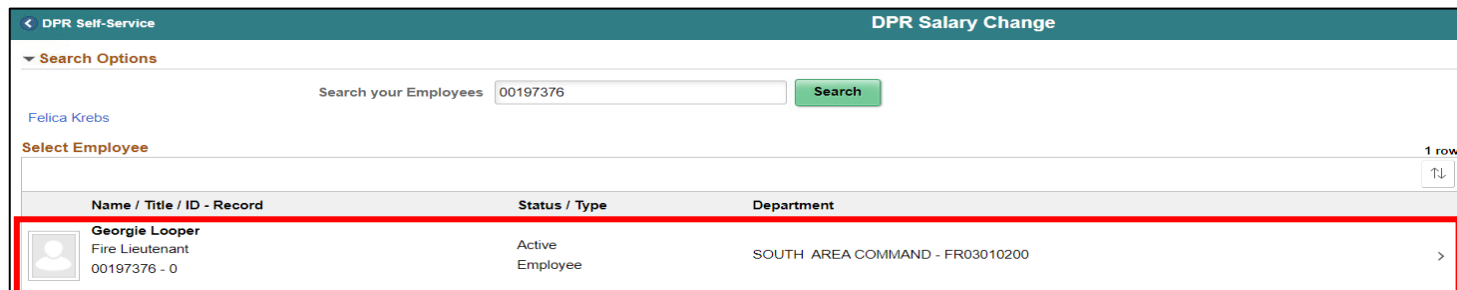


← DPR Self-Service

▼ Search Options

Search your Employees Enter Name, Employee ID, Title or Email Search

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




← DPR Self-Service DPR Salary Change

▼ Search Options

Search your Employees 00197376 Search

Felica Krebs

Select Employee

| Name / Title / ID - Record   | Status / Type      | Department                      |
|--|--------------------|---------------------------------|
|  <b>Georgie Looper</b><br>Fire Lieutenant<br>00197376 - 0 | Active<br>Employee | SOUTH AREA COMMAND - FR03010200 |

1 row

# 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**

Exit DPR Salary Change

George Looper  
Fire Lieutenant

1 MD Compensation Detail 2 MD Review & Submit

Next >

Compensation Details

\*Transaction Date 01/31/2022

\*Reason Components of Pay

| Pay Component                  | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|--------------------------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| Education Incentive Pay        |                |               | 155.78     | 155.78         | USD           | Flat Amount | Biweekly  |
| Fire - B. A.                   |                |               | 50.77      | 50.77          | USD           | Flat Amount | Biweekly  |
| Fire Paramedic (Protocol Certi |                |               | 24.000     | 24.000         | %             | Percent     | Biweekly  |
| Fire Hazardous                 |                |               | 125.00     | 125.00         | USD           | Flat Amount | Biweekly  |
| MDC Biweekly                   |                |               | 3,256.87   | 3,256.87       | USD           | Flat Amount | Biweekly  |

114,593.86 Compa-Ratio:1.68

57,819.04 Minimum 68,182.14 Midpoint 88,728.90 Maximum

New Information

Biweekly Salary 4,407.46 USD

Annual Rate 114,593.86 USD

Current Information

Biweekly Salary 4,407.46 USD

Annual Rate 114,593.86 USD

Changes Made  
\* Required Field

# 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

**Pay Components** 6 rows

&Amounts &Controls C&hanges C&onversion Show All

| *Rate Code                    | Seq | Comp Rate                     | Currency | Frequency | Percent | Rate Code Group |
|-------------------------------|-----|-------------------------------|----------|-----------|---------|-----------------|
| 1 EDINCP <input type="text"/> | 0   | 155.78 <input type="text"/>   | USD      | B         |         |                 |
| 2 <input type="text"/>        | 1   |                               |          |           |         |                 |
| 3 FIRBA <input type="text"/>  | 0   | 50.77 <input type="text"/>    | USD      | B         |         |                 |
| 4 FIRPRM <input type="text"/> | 0   | 819.04 <input type="text"/>   | USD      | B         | 24.000  | MDCMAX          |
| 5 HZDFIR <input type="text"/> | 0   | 125.00 <input type="text"/>   | USD      | B         |         |                 |
| 6 MDBKLY <input type="text"/> | 0   | 3,256.87 <input type="text"/> | USD      | B         |         |                 |

Calculate Compensation

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

## 10. Select **LEAD** for Leadworker

| Lookup                |                                |                      |                |                 |
|-----------------------|--------------------------------|----------------------|----------------|-----------------|
| Cancel                |                                |                      |                |                 |
| 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 - Training | 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**

**DPR Salary Change**

Georgie Looper  
Fire Lieutenant

MD Compensation Detail

1 2  
MD Review & Submit

Next

**New Information**

Biweekly Salary 4,600.61 USD  
Annual Rate 119,615.88 USD

**Current Information**

4,407.46 USD  
114,593.86 USD

Changes Made  
Required Field

**Salary Plan**

Salary Admin Plan C IAFF Local 1403 - Firefighters  
Salary Grade 004 004  
Grade Entry Date 10/20/2003  
Step 9  
Step Entry Date 10/20/2003

Default Pay Components

**Pay Components** 6 rows

| *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent | Rate Code Group |
|------------|-----|-----------|----------|-----------|---------|-----------------|
| 1 EDINCP   | 0   | 155.78    | USD      | B         |         |                 |
| 2 FIRBA    | 0   | 50.77     | USD      | B         |         |                 |
| 3 FIRPRM   | 0   | 856.42    | USD      | B         | 24.000  | MDCMAX          |
| 4 HZDFIR   | 0   | 125.00    | USD      | B         |         |                 |
| 5 LEAD     | 0   | 155.77    | USD      | B         |         |                 |
| 6 MDBKLY   | 0   | 3,256.87  | USD      | B         |         |                 |

Calculate Compensation



# 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.

**DPR Salary Change**

Georgie Looper  
Fire Lieutenant

1 MD Compensation Detail 2 MD Review & Submit

< Previous Submit

**Review and Submit**

Transaction Date 01/31/2022  
Reason Components of Pay

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

**Comments**

Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD).

**Attachments**

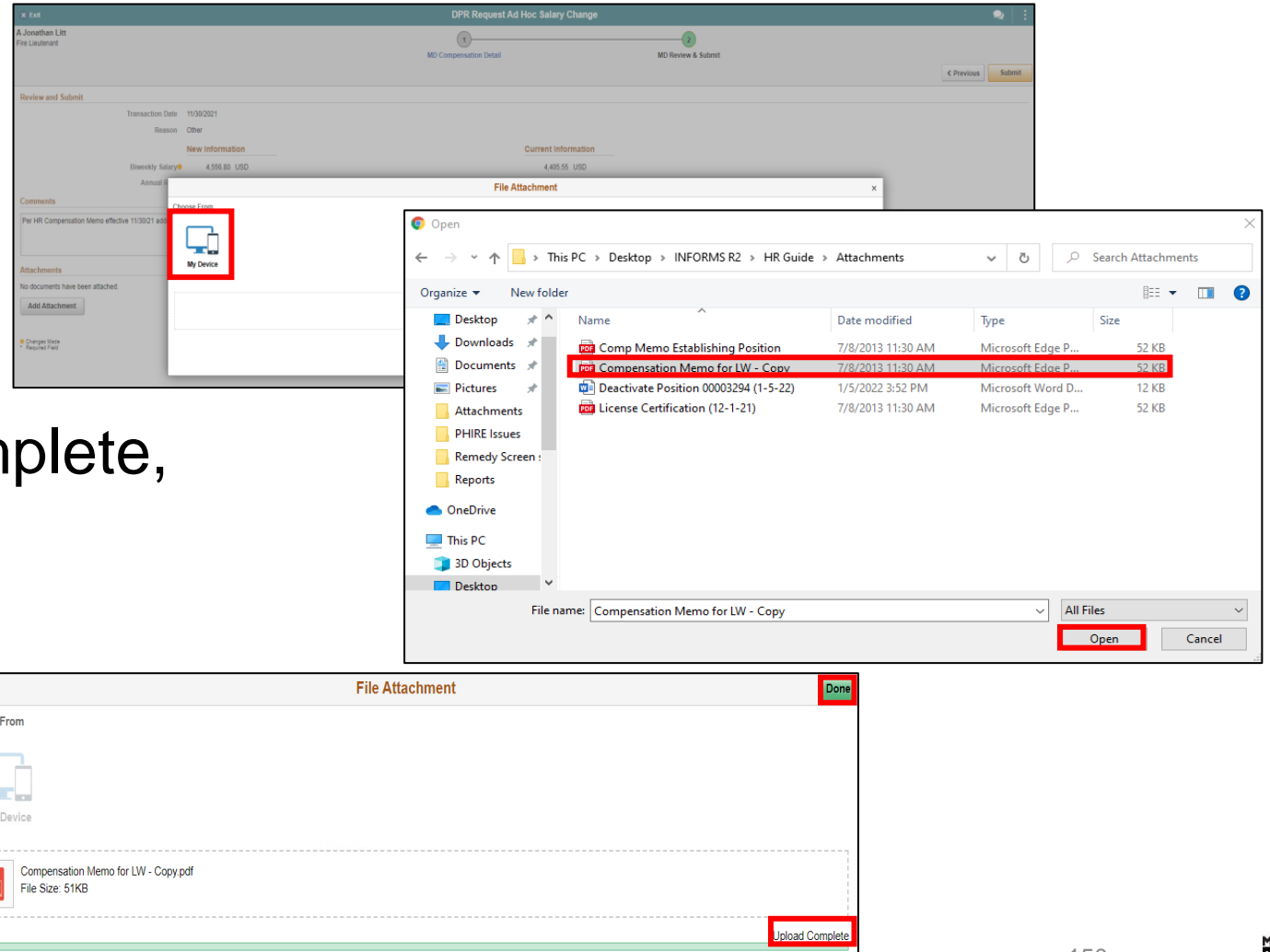
No documents have been attached.

**Add Attachment**

Changes Made  
Required Field

# 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.

**DPR Salary Change**

Georgie Looper  
Fire Lieutenant

MD Compensation Detail MD Review & Submit

Review and Submit

Transaction Date: 01/31/2022  
Reason: Components of Pay

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

Comments

Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD).

Attachments

| File Name                           | Description            | Date Time Attached |
|-------------------------------------|------------------------|--------------------|
| Compensation_Memo_for_LW_-_Copy.pdf | Compensation_Memo_for_ | 02/10/22 2:38:38PM |

Changes Made Required Field

**DPR Salary Change**

✓ Your transaction request for Georgie Looper has been successfully submitted for approval.

Georgie Looper  
Fire Lieutenant

Submit Confirmation

DPR Salary Change Approval

Pending

Multiple Approvers  
Central HR approver

Comments

Felicia Krebs at 02/10/22 - 2:40 PM  
Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD).

# 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**

The screenshot shows the 'Manage Employee Profile' page within the 'Human Resources (HCM)' system. The left sidebar contains a navigation menu with the following items: 'Job Information' (expanded), 'Workforce Job Summary', 'Manage Employee Profile' (highlighted with a red box), 'Headcount', 'Labor Administration', and 'HR Configuration'. The main content area is titled 'Person Profiles' and includes a search section. The 'Find an Existing Value' tab is selected and highlighted with a red box. Below this, the 'Search Criteria' section contains several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a text input field, highlighted with a red box), 'Profile Type' (with a dropdown set to 'begins with' and a search icon), 'Name' (with a dropdown set to 'begins with' and a text input field), 'Last Name' (with a dropdown set to 'begins with' and a text input field), and 'Alternate Character Name' (with a dropdown set to 'begins with' and a text input field). At the bottom of the search section, there are checkboxes for 'Include History' (checked) and 'Case Sensitive'. A 'Search' button is highlighted with a red box, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.

# 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

Human Resources (HCM) HR Administration

**Person Profile**

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

Print Comments Profile Actions [Select Action]

Education **Qualifications** Veterans' Preference Additional Information MDC Blue Book

**Honors and Awards**  
There are currently no Honors and Awards for this profile. Please add one if required.  
[+ Add New Honors and Awards](#)

**Language Skills**  
There are currently no Language Skills for this profile. Please add one if required.  
[+ Add New Language Skills](#)

**Licenses and Certifications**  
**There are currently no Licenses and Certifications for this profile. Please add one if required.**  
[+ Add New Licenses and Certifications](#)

**Memberships**  
There are currently no Memberships for this profile. Please add one if required.  
[+ Add New Memberships](#)

**Competencies**  
There are currently no Competencies for this profile. Please add one if required.  
[+ Add New Competencies](#)

Save  
Return to Search  
Add

# 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**.

Person Profile

Help

Add New Licenses and Certifications

Empl ID 00219546 Kaylani Oleary  
Profile Type PERSON Person

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

Details

\*Issue Date 01/01/2022  
\*License CPPO Cert Public Purchasing Officer  
Country USA United States  
State FL Florida  
☒ License Verified  
Expiration Date 01/01/2025  
License/Certification Number CPP12345 246 characters remaining  
Issued By Universal Public Procurement Certification Council (UPPCC) 196 characters remaining

OK Cancel Apply and Add Another

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

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

The screenshot displays the 'HR Administration' interface for 'Human Resources (HCM)'. The left sidebar shows navigation options: Job Information, Workforce Job Summary, Manage Employee Profile (selected), Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Person Profile' for 'Kaylani Cleary' (Empl ID: 00219546, Profile Type: PERSON, Profile Status: Active). Below the profile information are tabs for Education, Qualifications (selected), Veterans' Preference, Additional Information, and MDC Blue Book. The 'Qualifications' section is expanded, showing 'Licenses and Certifications' with a table containing one entry: 'CPPO' (Cert Public Purchasing Officer). The 'Attachments' column in this table is highlighted with a red box. Other sections like 'Honors and Awards', 'Language Skills', 'Memberships', and 'Competencies' are also visible but currently empty.

| ID   | License                        | Attachments |
|------|--------------------------------|-------------|
| CPPO | Cert Public Purchasing Officer |             |

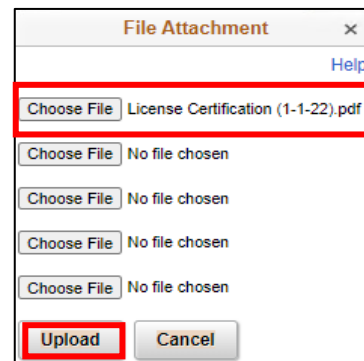
# Lecture 4: Pay Components (License/Certifications) Cont'd

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**.

Profile Item Attachments

Help

Attachments

1-1 of 1

| File Name                          | Description              | Attached On          |  |
|------------------------------------|--------------------------|----------------------|--|
| License_Certification_(1-1-22).pdf | CPPO K. O'leary 01-01-22 | 02/01/2022 9:45:06AM |  |

Add Attachment

OK Cancel

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

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

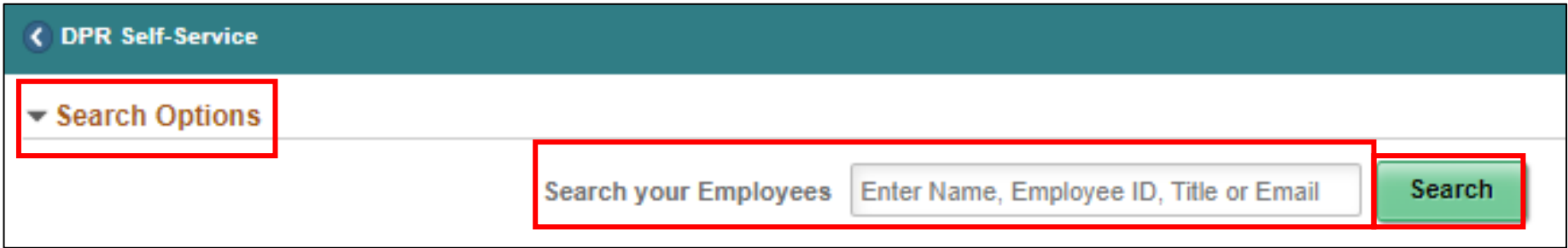
The screenshot shows the 'Person Profile' page in the HR Administration system. The left sidebar contains navigation links: Job Information, Job Data, Workforce Job Summary, Manage Employee Profile (highlighted), Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Person Profile' and displays information for Kaylani Cleary, including Empl ID 00219546, Profile Type PERSON, and Profile Status Active. Below this, there are tabs for Education, Qualifications (selected), Veterans' Preference, Additional Information, and MDC Blue Book. The 'Qualifications' section is expanded, showing 'Honors and Awards', 'Language Skills', 'Licenses and Certifications', 'Memberships', and 'Competencies'. The 'Licenses and Certifications' section contains a table with one entry: CPPO (Cert Public Purchasing Officer). The 'Save' button at the bottom is highlighted with a red box.

| ID   | License                        | Attachments |
|------|--------------------------------|-------------|
| CPPO | Cert Public Purchasing Officer |             |

# 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**.



The screenshot shows the 'DPR Self-Service' header. Below it, a 'Search Options' dropdown menu is highlighted with a red box. To the right, the 'Search your Employees' section is also highlighted with a red box. This section contains a text input field with the placeholder text 'Enter Name, Employee ID, Title or Email' and a green 'Search' button, both of which are also highlighted with red boxes.

# 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**.

**DPR Self-Service** **DPR Salary Change**

Search Options  
Search your Employees: 00219546 [Search]

Felica Krebs

Select Employee

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

**Compensation Details**

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

| Pay Component | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|---------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly  |                |               | 2,874.10   | 2,874.10       | USD           | Flat Amount | Biweekly  |
| Premium Pay   |                |               | 70.00      | 70.00          | USD           | Flat Amount | Biweekly  |

**Salary Plan**

Salary Admin Plan: GSAP - OPEU Local 100  
Salary Grade: 108  
Grade Entry Date: 09/11/2007  
Step: 8  
Step Entry Date: 09/11/2007

**Default Pay Components**

| *Rate Code | Seq | Comp Rate    | Currency | Frequency | Percent | Rate Code Group |
|------------|-----|--------------|----------|-----------|---------|-----------------|
| MDCBLY     | 0   | 2,874.10/USD |          | 8         |         |                 |
| PRSPAY     | 0   | 70.00/USD    |          | 8         |         |                 |
|            |     |              |          |           |         |                 |

Calculate Compensation

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

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

| Cancel <span>Lookup</span>               |                                |                        |                  |                   |
|--|--------------------------------|------------------------|------------------|-------------------|
| Search for: Rate Code                    |                                |                        |                  |                   |
| ▶ Search Criteria                        |                                |                        |                  |                   |
| ▼ Search Results                         |                                |                        |                  |                   |
| <div><div></div><div></div></div> 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.**

**DPR Salary Change**

MD Compensation Detail

MD Review & Submit

Next

Compensation Details

\*Transaction Date: 01/10/2022

\*Reason: Components of Pay

| Pay Component                  | Change Percent | Change Amount | New Amount | Current Amount | Currency Code | Type        | Frequency |
|--------------------------------|----------------|---------------|------------|----------------|---------------|-------------|-----------|
| MDC Biweekly                   |                |               | 2,874.10   | 2,874.10       | USD           | Flat Amount | Biweekly  |
| Purchasing Or Contract Procure |                | 131.94        | 131.94     |                | USD           | Flat Amount | Biweekly  |
| Premium Pay                    |                | 70.00         | 70.00      |                | USD           | Flat Amount | Biweekly  |

71,346.80 Compensation

Salary Range: 64,832.00 Minimum to 96,752.00 Maximum

**New Information**

Biweekly Salary: 2,874.04 USD  
Annual Rate: 74,777.04 USD

**Current Information**

Biweekly Salary: 2,744.10 USD  
Annual Rate: 71,346.80 USD

Change State Required Field

**Salary Plan**

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

**Default Pay Components**

| Rate Code    | Seq | Comp Rate | Currency | Frequency | Percent | Rate Code Group |
|--------------|-----|-----------|----------|-----------|---------|-----------------|
| MDC Biweekly | 0   | 2,874.10  | USD      | B         |         |                 |
| PRCHCT       | 0   | 131.94    | USD      | B         |         |                 |
| PRMIPAY      | 0   | 70.00     | USD      | B         |         |                 |

Calculate Compensation

# 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**.

**DPR Salary Change**

Kaylani Oleary  
Procurement Contracting Ofc 1

1 MD Compensation Detail 2 MD Review & Submit

< Previous Submit

**Review and Submit**

Transaction Date 01/10/2022

Reason Components of Pay

|                 | New Information | Current Information |
|-----------------|-----------------|---------------------|
| Biweekly Salary | 2,876.04 USD    | 2,744.10 USD        |
| Annual Rate     | 74,777.04 USD   | 71,346.60 USD       |

**Comments**

request to add the verified CPPO Certification effective 01/10/2022

**Attachments**

No documents have been attached.

Add Attachment

Changes Made  
Required Field

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

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

The screenshot displays a web interface for a 'DPR Salary Change'. At the top, a teal header bar contains a back arrow and the text 'HOME' on the left, and 'DPR Salary Change' on the right. Below the header, a green banner with a red border contains a confirmation message: '✓ Your transaction request for Kaylani Oleary has been successfully submitted for approval.' Below this, a grey bar shows the user's profile: 'Kaylani Oleary' and 'Procurement Contracting Ofc 1'. The main section is titled 'Submit Confirmation'. Underneath, a section titled 'DPR Salary Change Approval' shows a status bar with a dropdown arrow, the text ': Pending', a comment icon, and a link 'View/Hide Comments'. Below the status bar, a box titled 'DPR Salary Change Approval' contains a 'Pending' status, a clock icon, and the text 'Multiple Approvers' and 'Central HR approver'. At the bottom, a 'Comments' section shows a comment from 'Felica Krebs' dated '02/11/22 - 9:50 AM' with the text 'Request to add the verified CPPO Certification effective 01/10/2022'.



# 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**

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' tab selected. In the left sidebar, the 'Job Data' option is highlighted. The main content area is titled 'Job Data' and contains a search form. The 'Find an Existing Value' button is highlighted. Below it, the 'Search Criteria' section is expanded, showing various search fields. The 'Empl ID' field is highlighted with a red box, and the 'Search' button is also highlighted with a red box. The search criteria include 'Empl ID', 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown and a text input field. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', along with a 'Basic Search' button and a 'Save Search Criteria' link.

# 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.

HR Administration

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

Claudette Mclean  
Employee

Empl ID 00218029  
Empl Record 0

Compensation Details 1 of 2

Effective Date 11/24/2021  
Effective Sequence 1  
HR Status Active  
Payroll Status Active

Action Pay Rate Change  
Reason Merit

Compensation Rate 1,670.275 USD

\*Frequency B Biweekly

Go To Row

Comparative Information

Pay Rates

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

Default Pay Components

Contract Change Prorate Option

Pay Components

Amounts | Controls | Changes | Conversion

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

Calculate Compensation

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

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

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

# 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**.

HR Administration

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

Claudette Mclean Employee Empl ID 00218029 Empl Record 0

Compensation Details 1 of 2

Effective Date 11/24/2021  
Effective Sequence 1  
HR Status Active  
Payroll Status Active

Action Pay Rate Change  
Reason Merit  
Job Indicator Primary Job

Go To Row

Current

Compensation Rate 1,670.27 USD \*Frequency B Biweekly

Comparative Information

Pay Rates

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

Default Pay Components Contract Change Prorate Option

Pay Components 1-2 of 2

Amounts | Controls | **Changes** | Conversion

| *Rate Code | Seq | Change Amount | Currency | Frequency | Change Points | Change Percent |   |   |
|------------|-----|---------------|----------|-----------|---------------|----------------|---|---|
| 1 MDBKLY   | 0   | 76.679500     | USD      | Biweekly  |               | 5.000          | + | - |
| 2 PRMPYK   | 0   | 0.000000      | USD      | Biweekly  |               | 0.000          | + | - |

Calculate Compensation

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

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

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

# 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.

HR Administration

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

Claudette Mclean  
Employee

Empl ID 00218029  
Empl Record 0

Compensation Details ?

Effective Date 12/28/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Data Change

Reason

Job Indicator Primary Job

History

Go To Row

Compensation Rate 1,593.59 USD

\*Frequency B Biweekly

Comparative Information ?

Pay Rates ?

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

Default Pay Components

Contract Change Prorate Option

Pay Components ?

Amounts | Controls | Changes | Conversion | II

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

Calculate Compensation

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

Save | Return to Search | Notify | Refresh

Update/Display | Include History | Correct History

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

# 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**

The screenshot shows the 'Job Data' search interface within the 'Human Resources (HCM)' system. The left sidebar contains a menu with 'Job Data' highlighted. The main area has a 'Find an Existing Value' button and a 'Keyword Search' field. Below these are search criteria fields for 'Empl ID', 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', along with a 'Search' button and a 'Clear' button. The 'Search' button is highlighted with a red box.

Human Resources (HCM) HR Administration

Job Information

**Job Data**

Workforce Job Summary

Manage Employee Profile

Headcount

Labor Administration

HR Configuration

Dotted Line

Export Org Chart

OnBoarding

OffBoarding

**Job Data**

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

**Find an Existing Value** Keyword Search

**Search Criteria**

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** Clear Basic Search Save Search Criteria

# 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**.

The screenshot displays the 'HR Administration' interface with the 'Salary Plan' tab selected. The employee information shows 'Ofir Doty' with 'Empl ID 00014872' and 'Empl Record 0'. The 'Salary Plan Details' section shows a table with one record. The 'Effective Date' is 01/31/2022, 'Effective Sequence' is 0, 'HR Status' is Active, and 'Payroll Status' is Active. The 'Action' is 'Pay Rate Change' and the 'Reason' is 'Merit'. The 'Salary Admin Plan' is 'K' and the 'Grade' is '035'. The 'Step' is 10. The 'Grade Entry Date' is 01/31/1994 and the 'Step Entry Date' is 01/31/2022. The record is marked as 'Current'. The bottom of the screen shows navigation tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', 'Benefits Program Participation', and 'Creditable Adjusted Dates'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

| Effective Date | Effective Sequence | HR Status | Payroll Status | Action          | Reason | Step | Step Entry Date |
|----------------|--------------------|-----------|----------------|-----------------|--------|------|-----------------|
| 01/31/2022     | 0                  | Active    | Active         | Pay Rate Change | Merit  | 10   | 01/31/2022      |

# 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.

The screenshot displays the HR Administration interface. At the top, the 'Compensation' tab is selected and highlighted with a red box. Below the tabs, the 'Compensation Details' section shows fields for Effective Date (01/31/2022), Effective Sequence (0), HR Status (Active), and Payroll Status (Active). The Compensation Rate is listed as 2,215.80 USD, and the Frequency is Biweekly. The 'Pay Components' section is expanded, and the 'Amounts' sub-tab is selected and highlighted with a red box. A table below shows two compensation components: 1. MDBKLY with a rate of 2,145.800000 USD and 2. PRMPAY with a rate of 70.000000 USD. The first row is highlighted with a red box. At the bottom, there are buttons for 'Calculate Compensation' and 'Go To Row'.

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

# 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**.

HR Administration

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

Ofir Doty  
Employee

Empl ID 00014872  
Empl Record 0

Compensation Details ?

Effective Date 01/31/2022  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Pay Rate Change  
Reason Merit

Go To Row

Current

Compensation Rate 2,215.80 USD  
Frequency B Biweekly

Comparative Information ?

Pay Rates ?

Default Pay Components Contract Change Prorate Option

Pay Components ?

Amounts Controls **Changes** Conversion

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

Calculate Compensation

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



# 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**

Human Resources (HCM) HR Administration

**Job Information**

- Job Data
- Workforce Job Summary
- Manage Employee Profile

**Headcount**

**Labor Administration**

**HR Configuration**

**Dotted Line**

**Export Org Chart**

**OnBoarding**

**OffBoarding**

**Job Data**

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

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

**Search Criteria**

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

# 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**.

The screenshot displays the 'HR Administration' interface for employee George Loofer (Empl ID: 00197376). The 'Compensation' tab is selected, showing details for a salary change effective 01/31/2022. The 'Current' record is highlighted. The 'Pay Components' section lists six components, with the 'LEAD' component (Rate Code 5) highlighted. The 'LEAD' component has a rate of 155.770000 USD and a frequency of B. The 'Pay Components' table is as follows:

| Rate Code | Seq | Comp Rate    | Currency | Frequency | Points | Percent | Rate Code Group |
|-----------|-----|--------------|----------|-----------|--------|---------|-----------------|
| 1 EDINCP  | 0   | 155.780000   | USD      | B         |        |         |                 |
| 2 FIRBA   | 0   | 50.770000    | USD      | B         |        |         |                 |
| 3 FIRPRM  | 0   | 856.420800   | USD      | B         |        | 24.000  | MDCMAX          |
| 4 HZDFIR  | 0   | 125.000000   | USD      | B         |        |         |                 |
| 5 LEAD    | 0   | 155.770000   | USD      | B         |        |         |                 |
| 6 MDBKLY  | 0   | 3.256.870000 | USD      | B         |        |         |                 |

# 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**.

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' tab selected. In the left sidebar, the 'Job Information' menu is expanded, and 'Job Data' is highlighted. The main content area is titled 'Job Data' and contains a search form. The 'Find an Existing Value' button is highlighted. Below it, the 'Search Criteria' section is expanded, showing several search fields. The 'Empl ID' field is highlighted with a red box, and its dropdown menu is set to 'begins with'. Other search criteria include 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a 'Search' button.

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

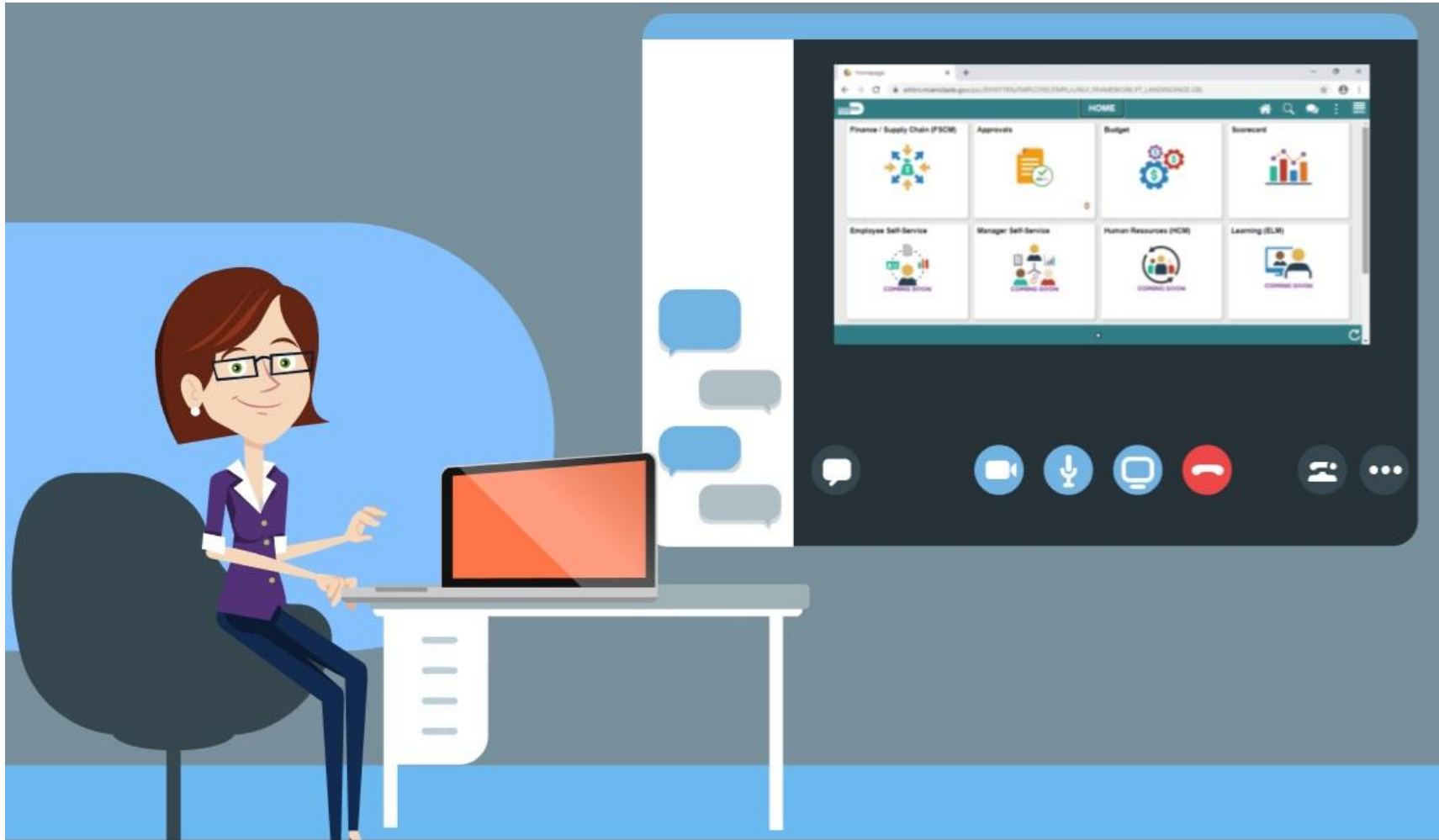
## 4. Select the **Compensation** tab.

- 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**.

The screenshot displays the HR Administration interface for employee Kaylani O'leary (Empl ID: 00219546). The 'Compensation' tab is selected. The 'Compensation Details' section shows the 'Effective Date' as 01/10/2022, 'Effective Sequence' as 0, 'HR Status' as Active, and 'Payroll Status' as Active. The 'Action' is 'Pay Rate Change' and the 'Reason' is 'Components of Pay'. The 'Current' record is highlighted. The 'Compensation Rate' is 2,876.04 USD, and the 'Frequency' is Biweekly. The 'Comparative Information' section shows a 'Change Amount' of 131.940000 USD and a 'Change Percent' of 4.808. The 'Pay Rates' section shows a 'Default Pay Components' button and a 'Contract Change Prorate Option'. The 'Pay Components' section shows a table with three rows: 1. MDBKLY, 2. PRCHCT, and 3. PRMPAY. The PRCHCT row is highlighted. The table has columns: Rate Code, Seq, Comp Rate, Currency, Frequency, Points, Percent, and Rate Code Group.

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

# 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  |
|---------------------|---|
| <b>Pay Calendar</b> | 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.  |
| <b>Pay Group</b>    | A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements 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. |
| <b>Pay Run IDs</b>  | 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   |
|------------------------|--|
| <b>Earnings Codes</b>  | An earnings code defines a type of earnings that an organization requires such as regular earnings, vacation, holiday, and special earnings.   |
| <b>Deduction Codes</b> | In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. 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**

### Review Paycheck

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

[Find an Existing Value](#)

▼ Search Criteria

Company

begins with ▼

Q

Pay Group

begins with ▼

Q

Pay Period End Date

= ▼

Q

Off Cycle ?

☐

Page Nbr

= ▼

Q

Line Nbr

= ▼

Q

Separate Check Nbr

= ▼

Paycheck Number

= ▼

Empl ID

begins with ▼

Name

begins with ▼

☐ Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)

[Save Search Criteria](#)

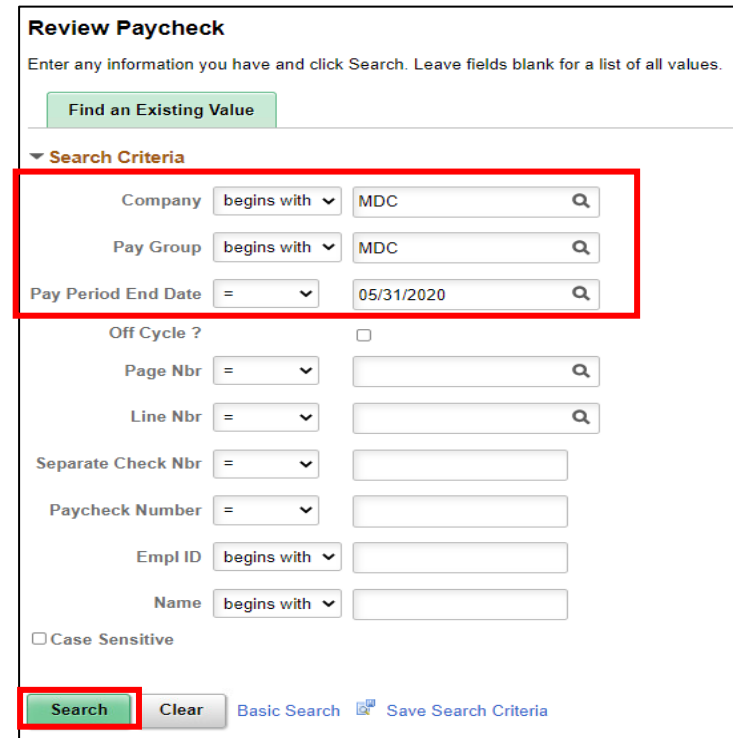
# Lecture 1: Payroll Continued

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

# 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**



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

[Find an Existing Value](#)

▼ **Search Criteria**

Company

begins with ▼

MDC

Q

Pay Group

begins with ▼

MDC

Q

Pay Period End Date

= ▼

05/31/2020

Q

Off Cycle ?

☐

Page Nbr

= ▼

Q

Line Nbr

= ▼

Q

Separate Check Nbr

= ▼

Paycheck Number

= ▼

Empl ID

begins with ▼

Name

begins with ▼

☐ Case Sensitive

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

# 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 |
| <a href="#">MDC</a> | MDC       | 10/31/2021          | N           | 1        | 1        | 0                  | ADVICE              | 30969           |         |      |
| <a href="#">MDC</a> | MDC       | 10/31/2021          | N           | 2        | 1        | 0                  | ADVICE              | 30970           |         |      |
| <a href="#">MDC</a> | MDC       | 10/31/2021          | N           | 2        | 2        | 0                  | ADVICE              | 30971           |         |      |
| <a href="#">MDC</a> | MDC       | 10/31/2021          | N           | 2        | 3        | 0                  | ADVICE              | 30972           |         |      |
| <a href="#">MDC</a> | 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

The screenshot shows the 'Review Paycheck' page for employee Kennedy, Matthew L. The 'Paycheck Earnings' tab is selected. The page displays the following information:

**Paycheck Information:**

- Empl ID: 00216718, Name: Kennedy, Matthew L., Company: MDC, Pay Group: FRE, Pay Period End: 05/31/2020, Page: 126, Line: 7, Separate Check: Yes
- Paycheck Status: Confirmed, Issue Date: 06/05/2020, Paycheck Number: 3521
- Off Cycle: ☐ Reprint: ☐ Adjustment: ☐ Corrected: ☐ Cashed: ☐

**Paycheck Totals:**

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

**Earnings:**

Begin Date: 05/19/2020, End Date: 05/24/2020, Addl Line Nbr: 2, Reason: Not Specified, Additional Data: 0

**Salaried:**

| Hours | Rate      | Earnings |
|-------|-----------|----------|
| 0.00  | 44.042769 | 0.00     |

**Hourly:**

| Hours | Rate     | Earnings |
|-------|----------|----------|
| 0.00  | 0.000000 | 0.00     |

**Overtime:**

| Hours | Rate     | Earnings |
|-------|----------|----------|
| 0.00  | 0.000000 | 0.00     |

**Other Earnings:**

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

**Special Accumulators:**

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

# 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.

The screenshot displays the 'Paycheck Earnings' interface for employee Matthew L. Kennedy (Empl ID: 00216718). The interface includes tabs for 'Paycheck Earnings', 'Paycheck Taxes', and 'Paycheck Deductions'. The 'Paycheck Earnings' tab is active, showing a 'Payroll Information' section with fields for 'Paycheck Status' (Confirmed), 'Paycheck Option' (Advice), 'Issue Date' (06/05/2020), and 'Paycheck Number' (3521). A 'Payroll Totals' summary shows Earnings of 4,228.10, Taxes of -2,416.20, Deductions of 186.76, and a Net Pay of 6,457.54. The 'Earnings' section is expanded, showing a table with columns for 'Begin Date', 'End Date', 'Add'l Line Nbr', 'Reason', and 'Not Specified'. The 'Begin Date' is 05/18/2020 and the 'End Date' is 05/24/2020. Below this, there are sections for 'Salaried', 'Hourly', and 'Overtime' earnings, each with a table showing 'Hours', 'Rate', and 'Earnings'. The 'Other Earnings' section is also expanded, showing a table with columns for 'Code', 'Description', 'Rate Used', 'Hours', 'Rate', 'Amount', and 'Source'. The 'Other Earnings Details 1' table shows a row for 'REG' (Regular Hours Pay) with a rate of 44.042769 and an amount of 2,114.05. The 'Special Accumulators' section is also expanded, showing a table with columns for 'Code', 'Description', 'Hours', 'Earnings', and 'Empl Record'. The 'Special Accumulators' table shows a row for 'GRS' (Reserved for Gross Wages) with a rate of 96.00 and an amount of 4,228.10. The interface includes a 'Return to Search' button and a 'Notify' button at the bottom.

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

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

# 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)

**Paycheck Earnings** Review Paycheck

Paycheck Earnings **Paycheck Taxes** Paycheck Deductions

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

**Paycheck Information**

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

**Paycheck Totals**

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

**Taxes**

1-5 of 5 View All

**Tax Details 1** Tax Details 2 Tax Tips

| Tax Entity | Resident | Locality | Locality Name | Tax Class   | Taxable Gross | Tax Amount |
|------------|----------|----------|---------------|-------------|---------------|------------|
| US Federal |          |          |               | MED/EE      | 4,101.26      | -594.7     |
| US Federal |          |          |               | Med/ER      | 4,101.26      | -594.7     |
| US Federal |          |          |               | OASDI/EE    | 4,101.26      | -2,542.9   |
| US Federal |          |          |               | OASDI/ER    | 4,101.26      | -2,542.9   |
| US Federal |          |          |               | Withholding | 4,101.26      | 721.5      |

[Return to Search](#) [Notify](#)

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



# 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.

Paycheck Earnings | Paycheck Taxes | **Paycheck Deductions**

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

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

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

**Deductions**  
1-8 of 9 View All

| Deduction Code | Description                    | Class              | Amount   | Calculated Base |
|----------------|--------------------------------|--------------------|----------|-----------------|
| DCFFLP         | DCFF Basic Life Ins Trust      | Nontaxable Benefit | 8.90     | 109,930.75      |
| STDIS          | Short-Term Disability Insuranc | After-Tax          | 3.80     | 259.99          |
| FRS            | FRS Contribution               | Before-Tax         | 126.84   | 4,228.10        |
| FRS            | FRS Contribution               | Nontaxable Benefit | 1,035.88 | 4,228.10        |
| FF1403         | Firefighters Union Local 1403  | After-Tax          | 38.94    |                 |
| FFCHAR         | Firefighters Charities         | After-Tax          | 4.00     |                 |
| FRPAC          | Firepac                        | After-Tax          | 5.00     |                 |
| LIFE5X         | Minnesota Opt Life (5X)        | After-Tax          | 7.75     |                 |

**Garnishments**

**Net Pay Distribution**  
1-1 of 1 View All

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

Return to Search Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

**Garnishments**  
1 of 1 View All

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

# 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.

The screenshot shows the 'Paycheck Deductions' tab for employee Kennedy, Matthew L. (Empl ID 00216718, Company MDC, Pay Group FRE, Pay Period End 05/31/2020). The 'Paycheck Information' section shows a confirmed status with an issue date of 06/05/2020 and a paycheck number of 3521. The 'Paycheck Totals' section shows earnings of 4,228.10, taxes of -2,416.20, deductions of 186.76, and a net pay of 6,457.54. The 'Deductions' table lists various deductions including DCFFLF (Life), STDIS (Short-Term Disability), FRS (Florida Retirement System), and several General Deductions (FF1403, FFCHAR, FRPAC, LIFE5X). The 'Net Pay Distribution' table shows the net pay of 6,457.54 being deposited into a checking account (Account Number XXXX5678, Bank ID 87654321).

| Deduction Code | Plan   | Benefit Record | Plan Type                 | Not Taken | Reason |
|----------------|--------|----------------|---------------------------|-----------|--------|
| DCFFLF         | FLIFE  | 0              | Life                      |           |        |
| STDIS          | STDHGH | 0              | Short-Term Disability     |           |        |
| FRS            | HB     | 0              | Florida Retirement System |           |        |
| FRS            | HB     | 0              | Florida Retirement System |           |        |
| FF1403         |        | 999            | General Deduction         |           |        |
| FFCHAR         |        | 999            | General Deduction         |           |        |
| FRPAC          |        | 999            | General Deduction         |           |        |
| LIFE5X         |        | 999            | General Deduction         |           |        |

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

# 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**

**Review Self Service Paycheck**

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

[Find an Existing Value](#)

**Search Criteria**

Company begins with

Pay Group begins with

Empl ID begins with

Name begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All | 1-1 of 1

| Company | Pay Group | Empl ID  | Name            |
|---------|-----------|----------|-----------------|
| MDC     | MDC       | 00400873 | Crespi,Christin |

# 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.

**View Self Service Paycheck**

Christina Crespi

Select Paycheck

1-2 of 2 | View All

| Check Date | View Paycheck                 | Company           | Pay Begin Date | Pay End Date | Net Pay   | Paycheck Number | PDF File |
|------------|-------------------------------|-------------------|----------------|--------------|-----------|-----------------|----------|
| 12/03/2021 | <a href="#">View Paycheck</a> | Miami Dade County | 11/15/2021     | 11/28/2021   | \$1135.97 | 60372           |          |
| 11/19/2021 | <a href="#">View Paycheck</a> | Miami Dade County | 11/01/2021     | 11/14/2021   | \$1319.22 | 62254           |          |

[Return to Search](#)

Miami Dade County  
111 NW 1st Street, Ste 2650  
Miami, FL 33128-1995

Pay Group: MDC-General Employees  
Pay Begin Date: 11/15/2021  
Pay End Date: 11/28/2021

Business Unit: PH  
Advice #: 060000000060372  
Advice Date: 12/03/2021

Christina Crespi  
112 NW Second Street  
Miami, FL 33128

Employee ID: 00400873  
Department: P000100000-NEWBERG WAREHOUSE  
Location: OPEN LAND/VACANT LOT/CANAL  
Job Title: Electrician  
Pay Rate: \$1,900.70 Biweekly

TAX DATA: Federal FL State  
Tax Status: Single N/A  
Allowances: N/A  
Addl. Percent: N/A  
Addl. Amount:

| HOURS AND EARNINGS |           |         |          |        |          | TAXES           |         |        |
|--------------------|-----------|---------|----------|--------|----------|-----------------|---------|--------|
| Description        | Rate      | Current | Excess   | Hours  | YTD      | Description     | Current | YTD    |
| AdmHrs             | 23.758750 | 40.00   | 950.35   | 84.00  | 1,995.74 | Fed Withholding | 155.68  | 370.60 |
| AdmHrs             | 23.758750 | 24.00   | 570.21   | 0.00   | 0.00     | Fed MED EE      | 27.56   | 60.45  |
| Holiday            | 23.758750 | 16.00   | 380.14   | 24.00  | 570.21   | Fed CASD/EE     | 117.84  | 258.46 |
| Car Allow          |           | 0.00    |          |        | 100.00   |                 |         |        |
| Night Diff         |           | 0.00    | 16.00    |        | 17.83    |                 |         |        |
| Overtime H         |           | 0.00    | 7.00     |        | 249.47   |                 |         |        |
| Regular Ho         |           | 0.00    | 52.00    |        | 1,235.46 |                 |         |        |
| TOTAL:             |           | 80.00   | 1,900.70 | 183.00 | 4,148.71 | TOTAL:          | 301.08  | 689.51 |

| BEFORE-TAX DEDUCTIONS |         |        | AFTER-TAX DEDUCTIONS        |         |        | EMPLOYER PAID BENEFITS        |         |          |
|-----------------------|---------|--------|-----------------------------|---------|--------|-------------------------------|---------|----------|
| Description           | Current | YTD    | Description                 | Current | YTD    | Description                   | Current | YTD      |
| FPS Contribution      | 57.02   | 122.06 | GARN/Child (Amount)         | 50.00   | 100.00 | Medical Select Insurance Plan | 219.23  | 1,038.46 |
|                       |         |        | GARN/Child (Co. Fee)        | 2.00    | 4.00   | Basic Life Insurance          | 4.00    | 8.00     |
|                       |         |        | GARN-Tax Levy               | 250.40  | 672.70 | FPS Contribution              | 205.66  | 440.24   |
|                       |         |        | GARN/Wht (Amount)           | 81.25   | 81.25  |                               |         |          |
|                       |         |        | GARN/Wht (Co. Fee)          | 2.00    | 2.00   |                               |         |          |
|                       |         |        | Govt Supervisors Assoc Dues | 21.00   | 42.00  |                               |         |          |
| TOTAL:                | 57.02   | 122.06 | TOTAL:                      | 406.65  | 901.95 | *TAXABLE                      |         |          |

| TOTAL GROSS |          | FED TAXABLE GROSS | TOTAL TAXES | TOTAL DEDUCTIONS | NET PAY  |
|-------------|----------|-------------------|-------------|------------------|----------|
| Current     | 1,900.70 | 1,843.68          | 301.08      | 463.67           | 1,135.97 |
| YTD         | 4,148.71 | 4,046.65          | 689.51      | 1,024.01         | 2,455.19 |

NET PAY DISTRIBUTION

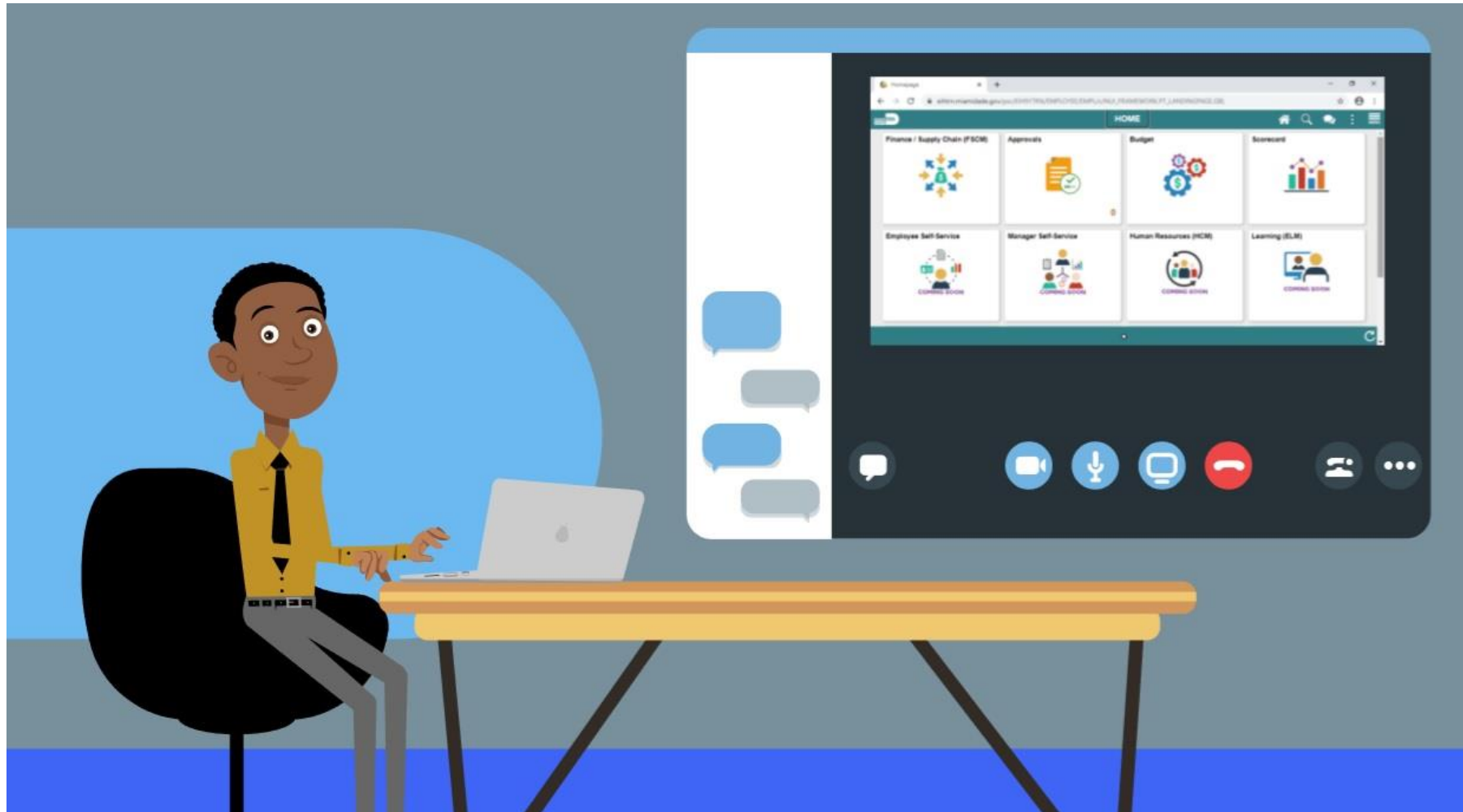
| Account Type | Account Number | Deposit Amount |
|--------------|----------------|----------------|
| Checking     | XXXXXXXXXX     | 500.00         |
| Checking     | XXXXXXXXXX     | 635.97         |
| TOTAL:       |                | 1,135.97       |

MESSAGE:

Please consider the environment before printing your paystub

Mission Statement:  
"Delivering excellent public services that address our community's needs and enhance our quality of life, now and in the future."

# 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

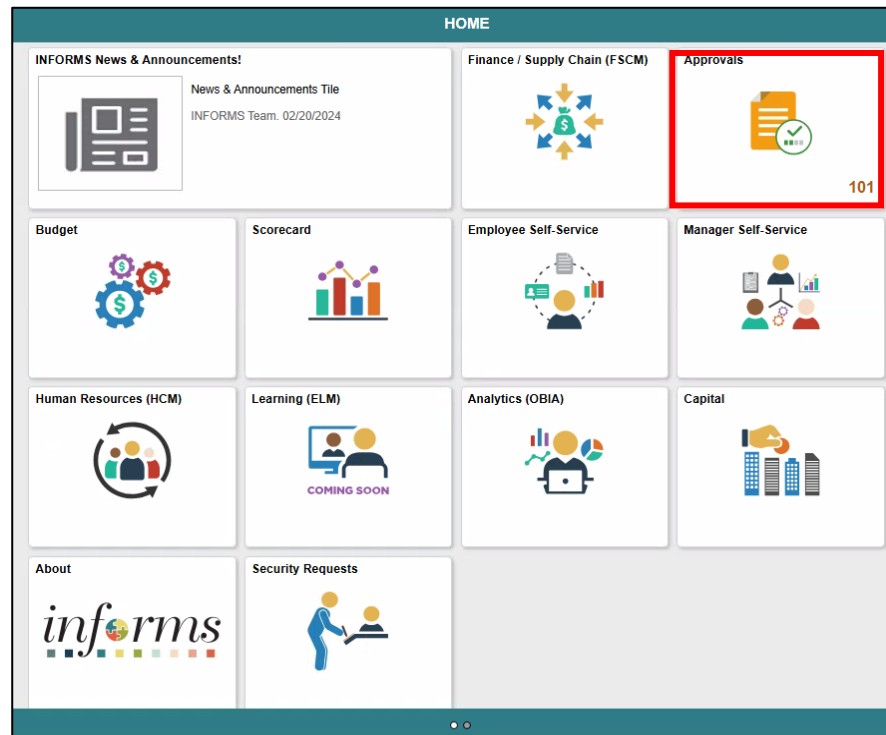




# Lesson 8: Workflow Approvals Continued

## Navigate to Approvals: **Approvals**

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



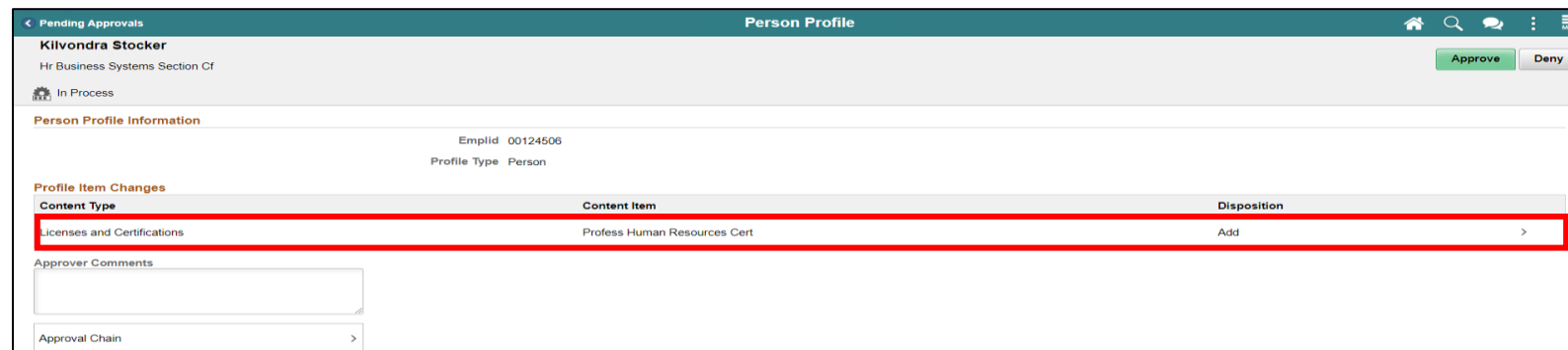
# Lesson 8: Workflow Approvals Continued

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



| Pending Approvals |                   |  |                        |
|-------------------|-------------------|--|------------------------|
| View By           | Type              |  |                        |
| All               | 3                 | All  | 3 rows                 |
| Person Profile    | 3                 |  |                        |
| Person Profile    | Devaughn Liang    | Profile Type: Person<br>Licenses and Certifications(1) | Routed<br>01/20/2022 > |
| Person Profile    | Kilvondra Stocker | Profile Type: Person<br>Degrees(1)                     | Routed<br>02/18/2022 > |
| Person Profile    | Kilvondra Stocker | Profile Type: Person<br>Licenses and Certifications(1) | Routed<br>02/18/2022 > |

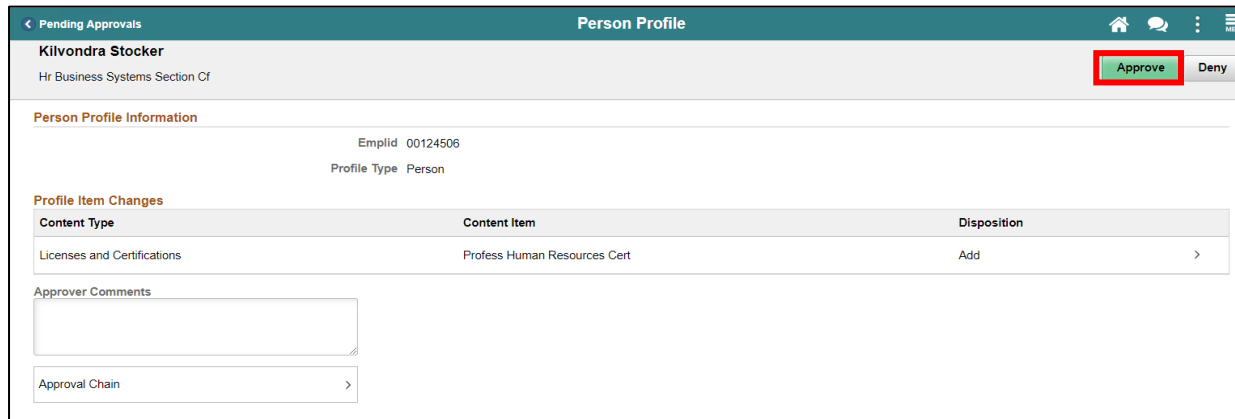
2. Select the **Profile Item Changes Content Item** to view the request before approving.



| Person Profile                 |                              |             |
|--------------------------------|------------------------------|-------------|
| Kilvondra Stocker              |                              |             |
| Hr Business Systems Section Cf |                              |             |
| In Process                     |                              |             |
| Person Profile Information     |                              |             |
| Emplid 00124506                |                              |             |
| Profile Type Person            |                              |             |
| Profile Item Changes           |                              |             |
| Content Type                   | Content Item                 | Disposition |
| Licenses and Certifications    | Profess Human Resources Cert | Add >       |
| Approver Comments              |                              |             |
| Approval Chain >               |                              |             |

# Lesson 8: Workflow Approvals Continued

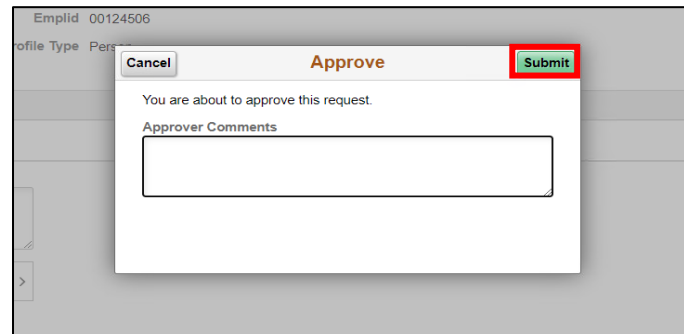
## 3. Select **Approve**.



The screenshot shows the 'Person Profile' page for Kilvondra Stocker. The page has a teal header with a back arrow, 'Pending Approvals', and 'Person Profile'. Below the header, the name 'Kilvondra Stocker' and 'Hr Business Systems Section Cf' are displayed. To the right of the name are two buttons: 'Approve' (highlighted with a red box) and 'Deny'. Below this is the 'Person Profile Information' section, which includes 'Emplid: 00124506' and 'Profile Type: Person'. The 'Profile Item Changes' section contains a table with three columns: 'Content Type', 'Content Item', and 'Disposition'. The table has one row: 'Licenses and Certifications', 'Profess Human Resources Cert', and 'Add'. Below the table is an 'Approver Comments' text area and an 'Approval Chain' dropdown menu.

| Content Type                | Content Item                 | Disposition |
|-----------------------------|------------------------------|-------------|
| Licenses and Certifications | Profess Human Resources Cert | Add         |

## 4. Select **Submit**.



The screenshot shows a modal dialog box titled 'Approve'. It has three buttons at the top: 'Cancel', 'Approve', and 'Submit' (highlighted with a red box). The dialog contains the text 'You are about to approve this request.' and an 'Approver Comments' text area.

# 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.

**Person Profile**

Empl ID: 00124506, Kilvondra Stocker  
Profile Type: PERSON, Person  
\*Profile Status: Active  
\*Description: Shane Bissessar

Print | Comments | Profile Actions: [Select Action]

**Approvals**

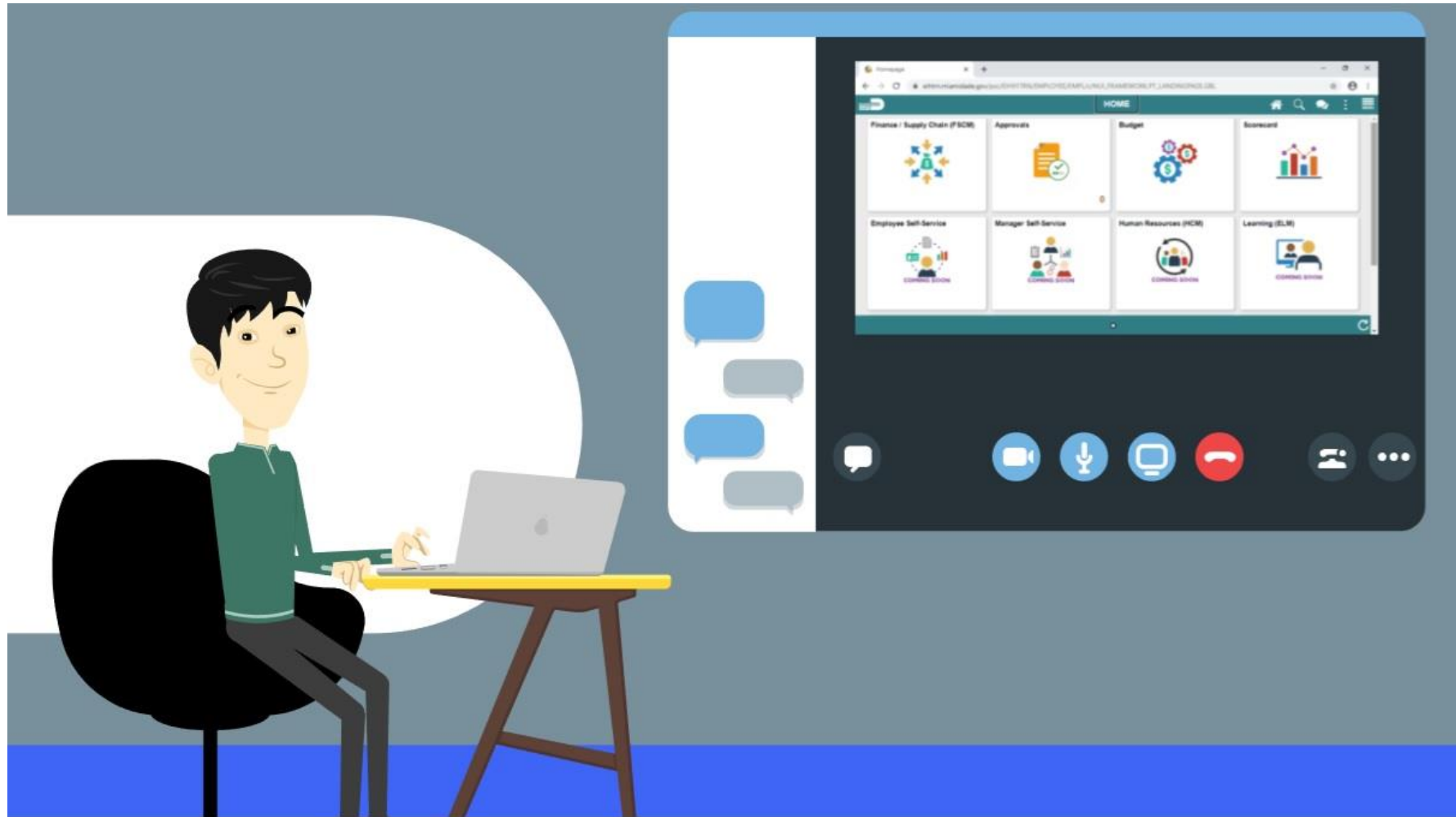
- 1 item(s) pending approval
- 1 item(s) approved (since 09/27/2021)

**Education** | Qualifications | Veterans' Preference | Additional Information | MDC Blue Book

**Degrees**

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

# 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

# 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](http://www.miamidade.gov/informs)



**CONGRATULATIONS**

Congratulations on successfully completing the Personnel Changes course!

**DPR 302 – Personnel Changes**