



# Course ID: DPR 304

# Course: Updating Team Information

*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 Updating Team Information 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: Updating Team Information<ul style="list-style-type: none"><li>○ Discipline Management</li><li>○ Retirement, Separation, and Leave of Absence Transactions</li></ul></li><li>• Module 3: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• Constitutional Office Department Personnel Representative</li><li>• Department Personnel Representative (DPR)</li><li>• Manager</li></ul>

# Course Overview Continued

<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 – Introductory Course - Human Resources Fundamentals</li></ul>
<b>Other Related Courses</b>	<ul style="list-style-type: none"><li>• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)</li><li>• DPR 302 – Departmental HR - Personnel Changes</li><li>• DPR 303 – Departmental HR - Time Management</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: Updating Team Information

- Lesson 1: Discipline Management
  - Lecture 1: Record a Disciplinary Action and Action Taken
  - Lecture 2: Record a Disciplinary Resolution
- Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd
  - Lecture 1: Retirement, Separation, and Leave of Absence Transactions

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

- Record and Manage Disciplinary Records of Employees
- Record Retirement, Separation, and Leave of Absence Transactions

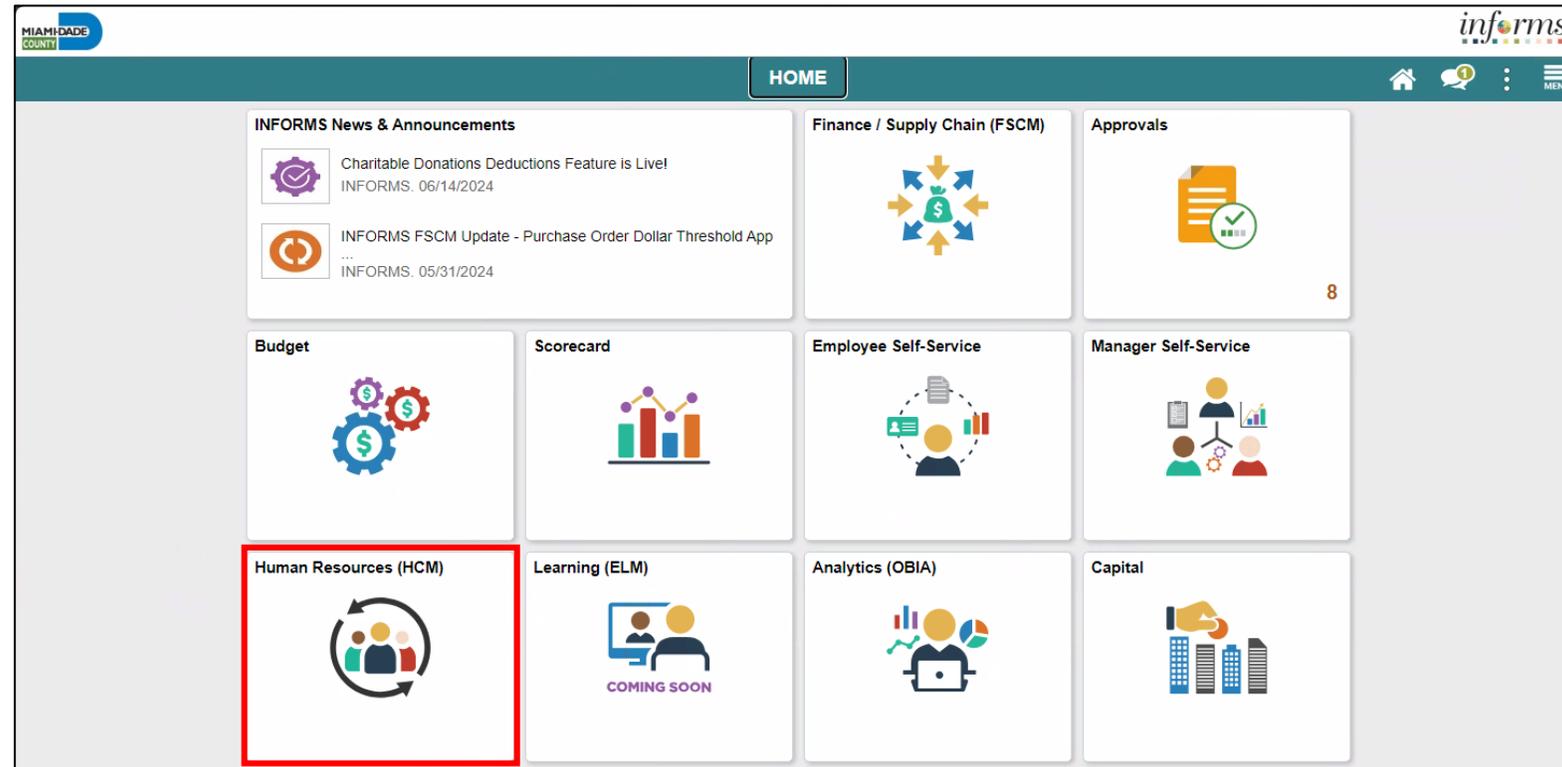
# Roles and Responsibilities

The roles and responsibilities associated with this course:

Role	Responsibilities
<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>Department Personnel Representative (DPR)</b>	The DPR is responsible for entering all separations and Leave of Absences transactions.
<b>Manager</b>	The Manager is responsible for reviewing and approving HCM Module transaction types including Time & Labor, Absence, Leave of Absence (LOA), ePerformance, Retirement, and Terminations through the Manager Self-Service (MSS) functionality.

# Navigation

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



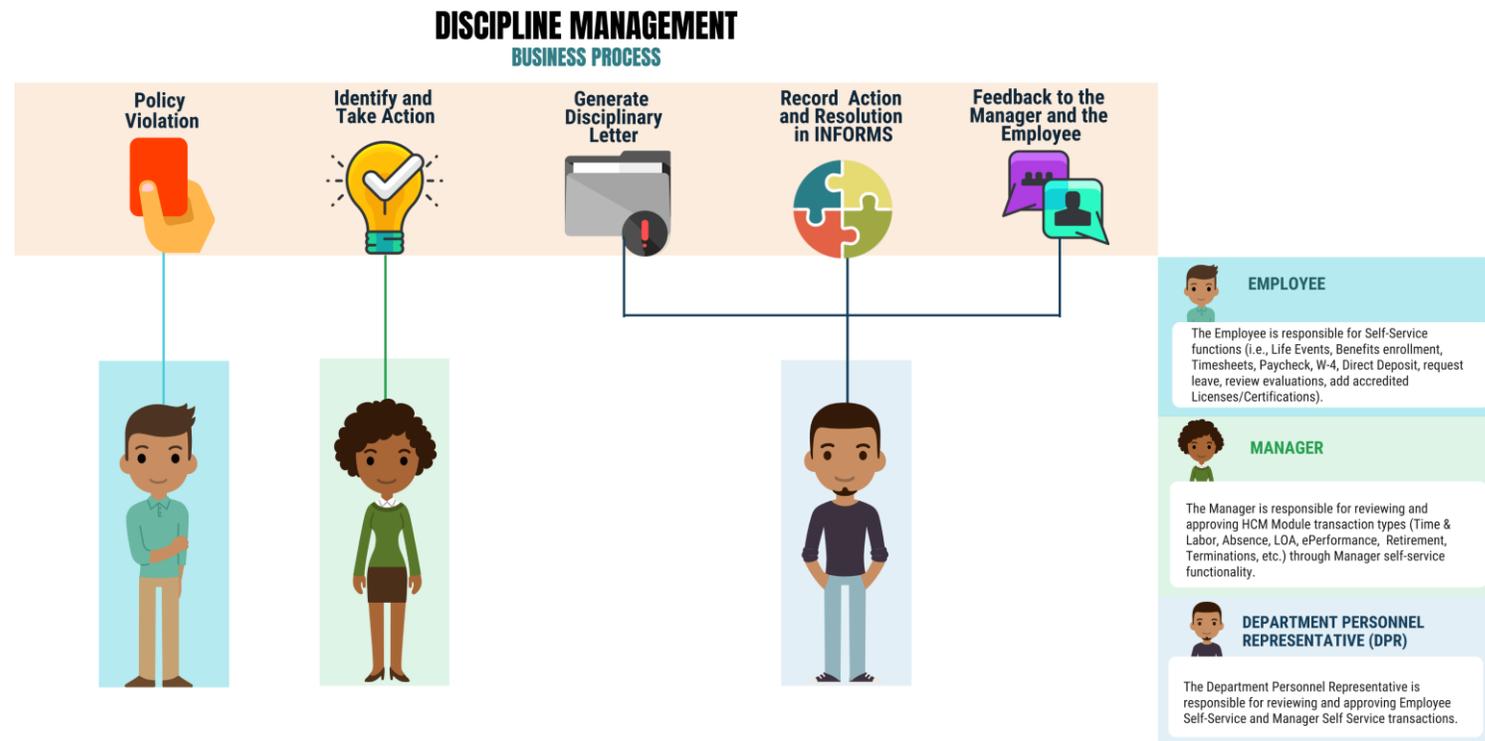
# Purpose and Benefits

The purpose and benefits of Updating Team Information business process include:

- Reduce paper process (Electronic workflows).
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities).
- Reduction of processing time.
- Recruit to Hire 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 – Leave of Absence (LOA), retirees, and benefit billing all in one system.

# End-to-End Business Process

INFORMS Human Resources (HCM) allows DPRs to record and manage disciplinary records of employees, retirement and resignation requests of employees, involuntary separation of employee, and approve payroll transactions.

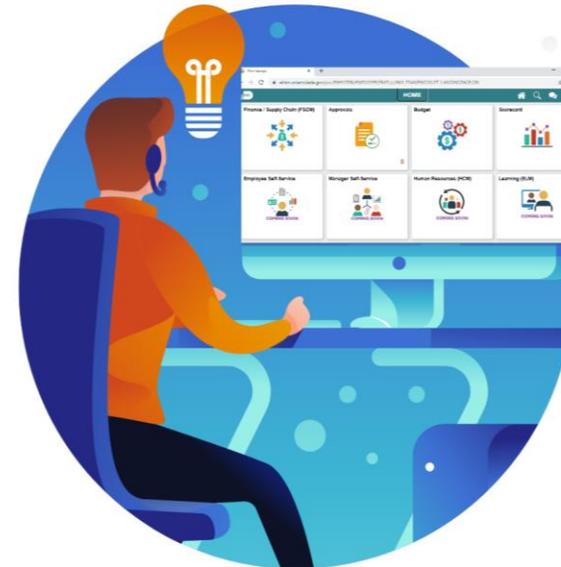


# Introduction to Activities and Exercises

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



Training  
Activities



Training  
Exercises

# Module 2: Updating Team Information

## Module Topics

Module Introduction

Lesson 1: Discipline Management

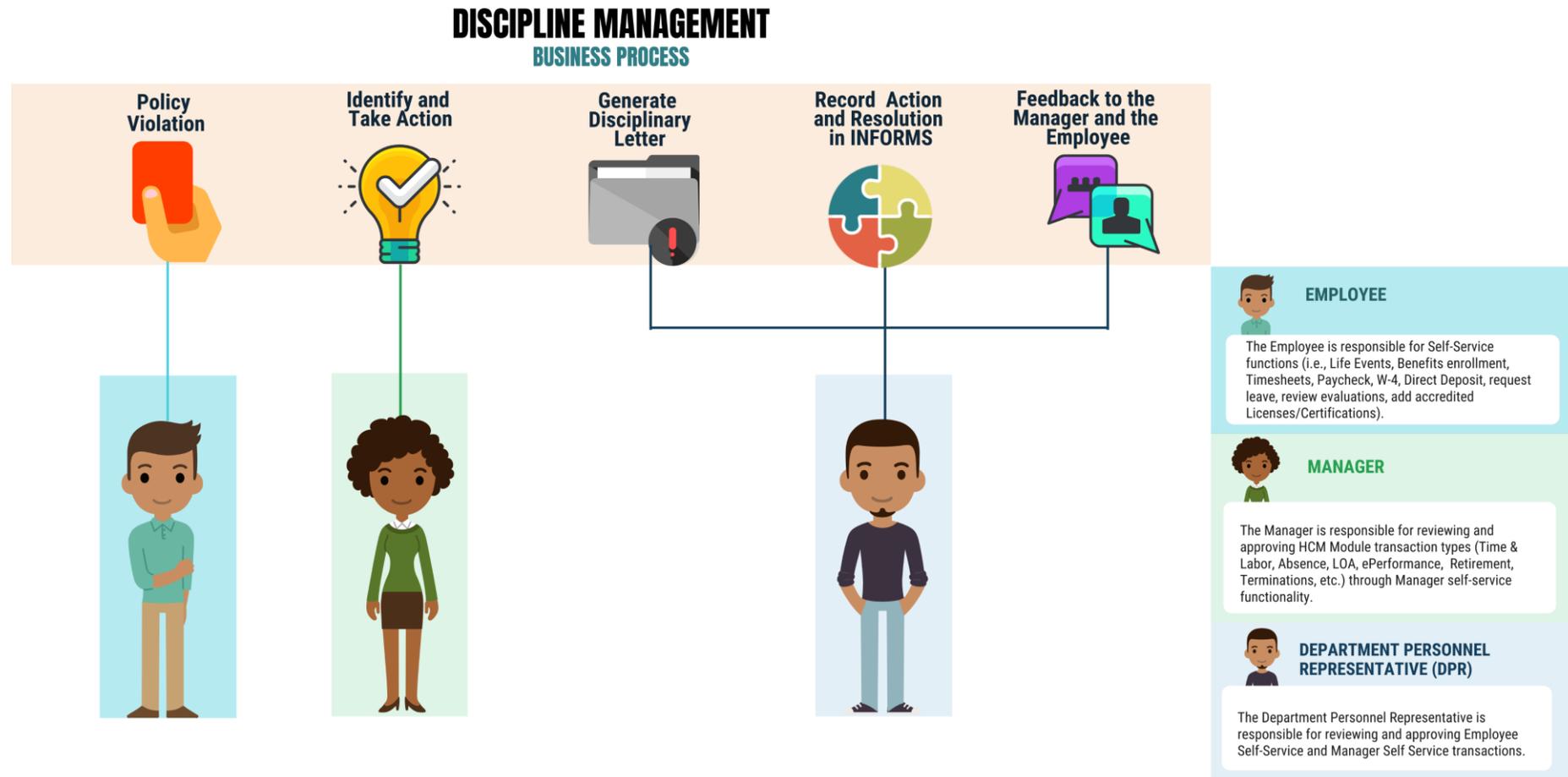
Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

# Lesson 1: Discipline Management

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

- Record employee Disciplinary Action and Action Taken Records
- Record employee Disciplinary Resolution Records

# Lesson 1: Discipline Management Cont'd



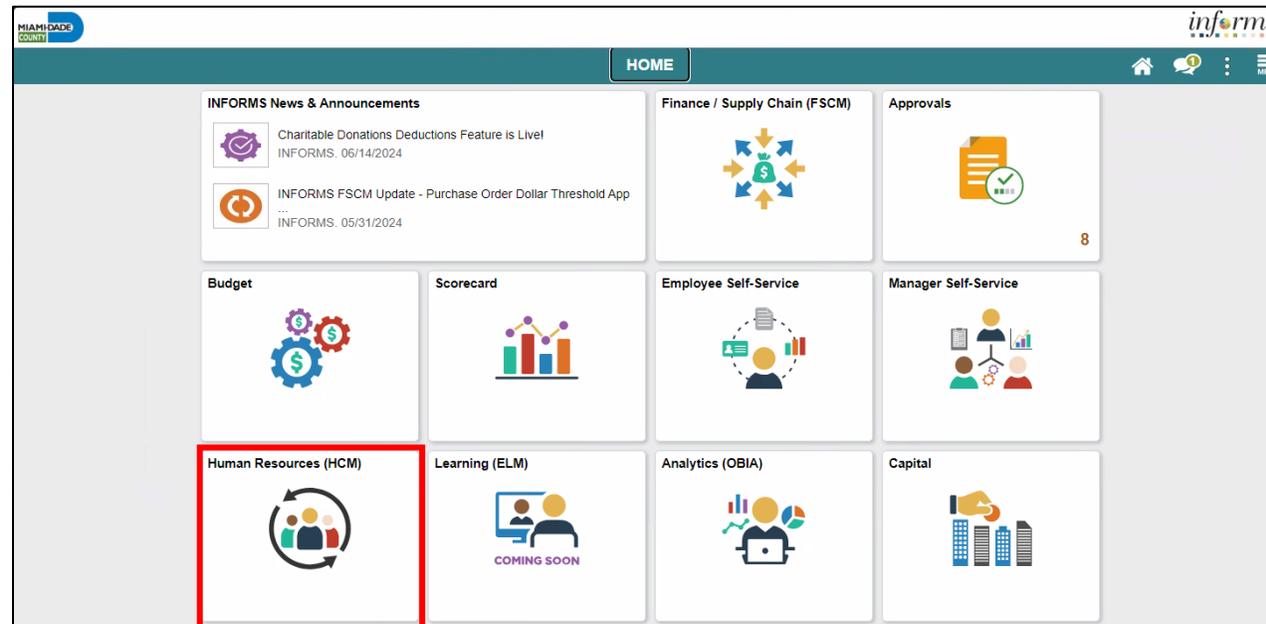
# Lesson 1: Key Terms

Term	Definition
<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>Disciplinary Action</b>	Corrective action to reprimand the employee based on the violation.
<b>Disciplinary Letter</b>	A written memo addressed to the employee for the violation.
<b>Disciplinary Resolution</b>	Recommended and final action that the County will take to resolve the violation.
<b>Violations</b>	Policy or departmental-based offenses made by the employee.

# Lesson 1: Discipline Management Cont'd

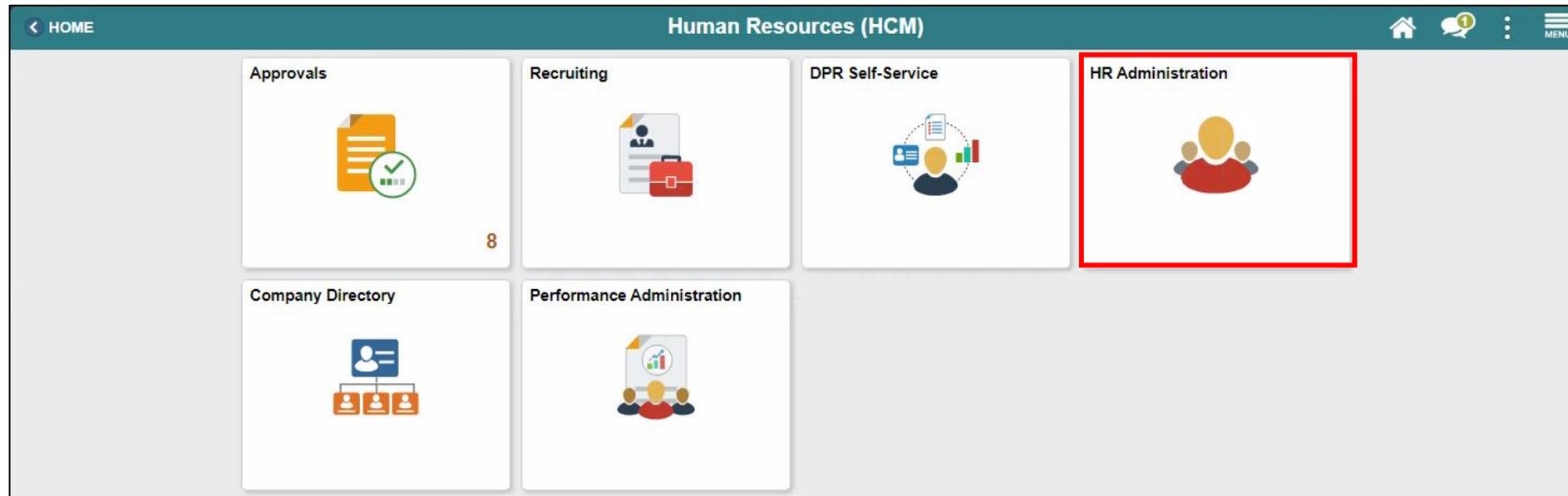
As a DPR, create a disciplinary action and disciplinary action taken record in INFORMS.

1. Log into INFORMS and select **Human Resources (HCM)** from the home landing page below.



# Lesson 1: Discipline Management Cont'd

## 2. Select HR Administration.



# Lesson 1: Discipline Management Cont'd

3. Select **Labor Administration**.
4. Select **Record Administrative Actions**.
5. Populate the **Search Criteria** as needed, and then select **Search**.
6. Select an employee who violated a policy or regulation.

Human Resources (HCM) HR Administration

Record Administrative Actions

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

First Name begins with

Last Name begins with

Payroll Status =

Employee Classification begins with

Employee Type =

Business Unit begins with SW

Supervisor ID begins with

Job Title begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All 1-100 of 300

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Supervisor ID	Job Title
00000374	Luis	Moreno	Retired	AA	Except Hrly	00403158	Constructi
00000468	Randall	Camacho	Active	AA	Hourly	00011998	Waste Trac
00000486	Juan	Guillama	Retired	AZ	Hourly	(blank)	Inactive C
00002052	Anthony	Clay	Active	AA	Hourly	00023568	Waste Supe

# Lesson 1: Discipline Management Cont'd

7. Make sure to complete the mandatory and other relevant fields in the **Disciplinary Action** tab. In this example:

- **Type:** Search and select **Disciplinary Type** from the **Look Up** pop-up window.
- **Incident Date:** Select the month, day, and year from the calendar icon when the violation occurred.
- **Disciplinary Date:** Select the month, day, and year from the calendar icon when the disciplinary action will be imposed.
- **Violations:** Search and select **Violations** from the **Look Up** pop-up window.
- **Note:** The description is auto-populated based on the selection.
- **Discipline Offenses:** Search and select **Disciplinary Offense** from the **Look Up** pop-up window.
- **Note:** The description is auto-populated based on the selection.

The screenshot displays the 'HR Administration' interface for a 'Disciplinary Action' form. The user is logged in as Randall Camacho (Person ID: 00000468). The form is currently in the 'Disciplinary Action' tab. The form includes the following fields and sections:

- Person Information:** Randall Camacho, Person ID: 00000468, Total Incident: 0.
- Form Fields:**
  - \*Type: Searchable dropdown.
  - \*Incident Date: Calendar icon.
  - Cost: Text input.
  - Entered By: 00036961 (searchable).
  - Supervisor ID: 00011998 (searchable).
  - Initiating Supervisor: Searchable.
  - \*Report Date: Calendar icon.
  - Confidential: Checked checkbox.
  - Associated DAR Number: Text input.
  - Disciplinary Status: Active (dropdown).
  - Trinese Lamb (Name).
  - Arnaldo Perez (Name).
- Violations Section:** Searchable table with columns for Violations and Description.
- Discipline Offenses Section:** Searchable table with columns for Disciplinary Offense and Description.

# Lesson 1: Discipline Management Cont'd

- **Facts:** Provide the Facts related to the Discipline Offense.
- **Administrative/Implementing Orders:** Search and select **Administrative Orders** from the **Look Up** pop-up window.
  - **Note:** The description is auto-populated based on the selection.
- **Departmental Standard Operational Procedures:** Search and select Dept Standard Operation Proc from the **Look Up** pop-up window.
  - **Note:** This is unique to every department and each department can select a violation as needed.

The screenshot displays three distinct data entry sections, each highlighted with a red border:

- Facts:** A simple text input field.
- Administrative/Implementing Orders:** Features a search bar, a table with columns 'Administrative Orders' and 'Description', and a 'View All' link. The table has one row with a search input and '+'/'-' buttons.
- Departmental Standard Operational Procedures:** Features a search bar, a table with columns 'Dept Standard Operational Proc', 'Effective Date', and 'Description', and a 'View All' link. The table has one row with a search input and '+'/'-' buttons.

# Lesson 1: Discipline Management Cont'd

- **Miscellaneous Departmental Violations:** Search and select **Misc. Departmental Violations** from the **Look Up** pop-up window.
  - **Note:** This is unique to every department and each department can select a violation as needed.
- 8. Select the **Action Taken** hyperlink.

The screenshot displays a web application interface for managing 'Miscellaneous Departmental Violations'. At the top, a search bar and navigation controls (1-1 of 1, View All) are visible. Below this is a table with columns for 'Miscellaneous Dept Violations' and 'Description'. The first row contains the number '1' and a search icon. To the right of the table are '+' and '-' buttons. Below the table is a 'Disciplinary Notes' text area. Underneath is an 'Attachments' section with a search bar, navigation controls (1-1 of 1), and a table with columns for 'Attached File' and 'Add Attachment'. The first row contains the number '1' and an 'Add Attachment' button. Below the attachments table are 'Print Report' and 'Print Notes' buttons. At the bottom of the interface are 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify' buttons. A breadcrumb trail at the very bottom shows 'Disciplinary Action' > **Action Taken** > 'Disciplinary Resolution' > 'MD Appeals', with 'Action Taken' highlighted in a red box.

# Lesson 1: Discipline Management Cont'd

9. Make sure to complete the mandatory and other relevant fields in the **Action Taken** tab. In this example:

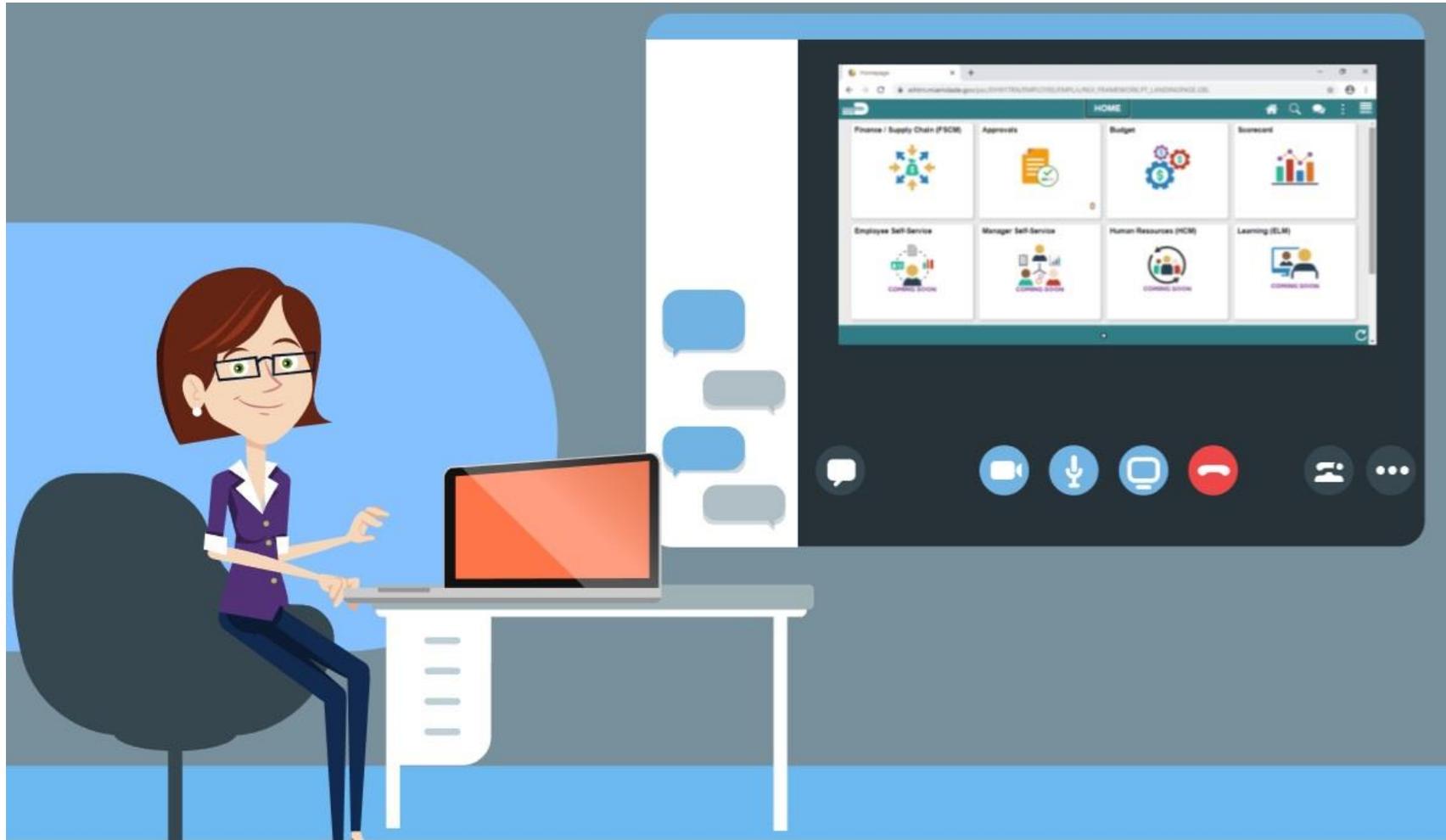
- **Disciplinary Step:** Type the **Disciplinary Step**, or search and select it from **the Look Up** pop-up window.
- **Action Date:** Type the date, or select the month, day, and year from the calendar icon when the disciplinary action is conducted.
- **Discussed With:** Type the **Empl ID** of the manager whom the employee discussed with regarding the disciplinary action, or search and select it from the **Look Up** pop-up window.

10. Select **Save** to create the disciplinary record.

**Note:** The DPR will receive a receipt notification once the record is saved.

The screenshot displays the 'HR Administration' interface. At the top, there are tabs for 'Disciplinary Action', 'Action Taken' (which is highlighted in green), 'Disciplinary Resolution', and 'MD Appeals'. Below the tabs, the employee's name 'Randall Camacho' and 'Person ID 0000468' are visible. A 'Total Incident' count of '1' is shown. The main content area is divided into two sections: 'Disciplinary Information' and 'Action Taken'. The 'Action Taken' section is highlighted with a red border and contains the following fields: '\*Disciplinary Step' with a search icon and expand/collapse buttons; '\*Action Date' with the value '11/12/2024' and a calendar icon; 'Discussed With' with a search icon; and a 'Comment' text area with a copy icon. Below these fields are 'Print Report' and 'Print Notes' buttons. At the bottom of the interface, there is a row of buttons: 'Save' (highlighted in green), 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The footer of the page shows navigation links for 'Disciplinary Action', 'Action Taken', 'Disciplinary Resolution', and 'MD Appeals'.

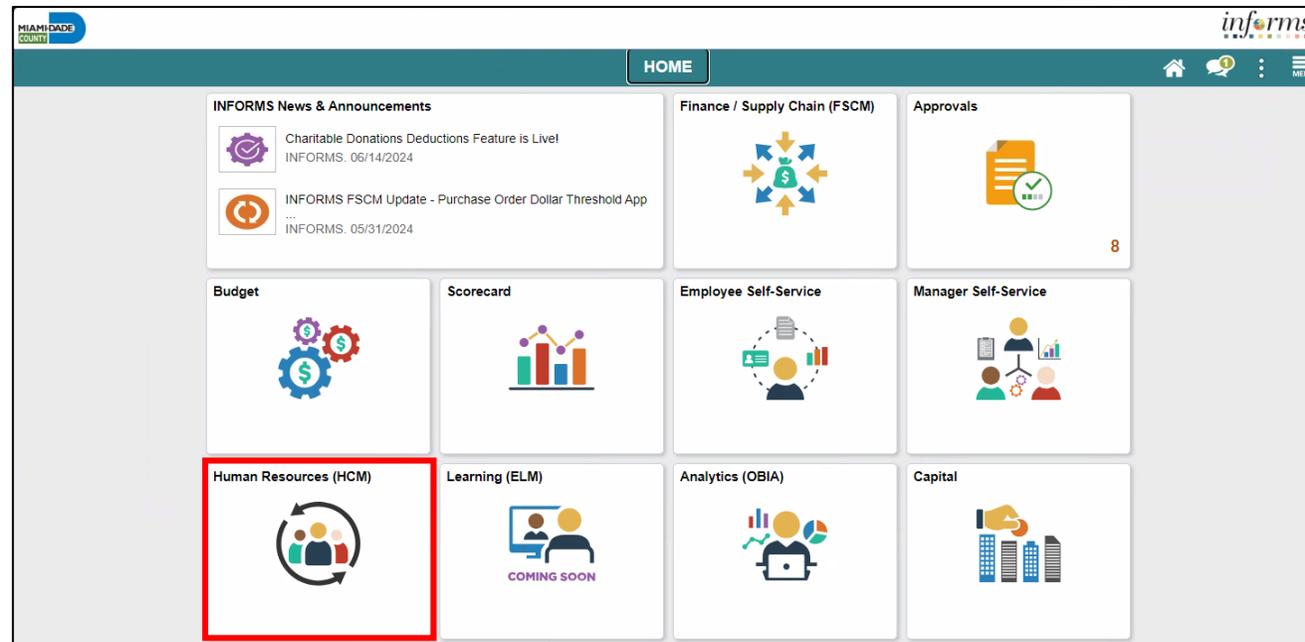
# Lesson 1: Activities and Exercises



# Lesson 1: Discipline Management Cont'd

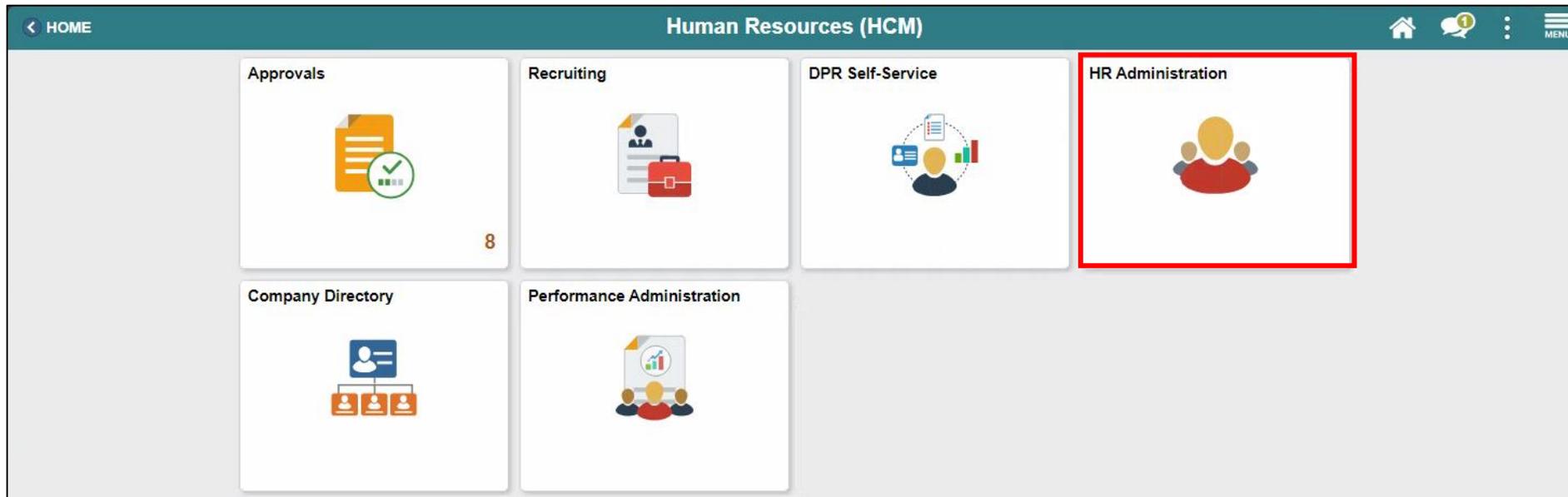
As a DPR, create a disciplinary resolution record in INFORMS.

1. Log into INFORMS and select **Human Resources (HCM)** from the home landing page below.



# Lesson 1: Discipline Management Cont'd

## 2. Select HR Administration.



# Lesson 1: Discipline Management Cont'd

3. Select **Labor Administration**.
4. Select **Record Administrative Actions**.
5. Populate the **Search Criteria** as needed, and then select **Search**.
6. Select an employee who violated a policy or regulation.

Human Resources (HCM) HR Administration

Record Administrative Actions

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 [ ]

First Name begins with [ ]

Last Name begins with [ ]

Payroll Status = [ ]

Employee Classification begins with [ ]

Employee Type = [ ]

Business Unit begins with SW

Supervisor ID begins with [ ]

Job Title begins with [ ]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All 1-100 of 300

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Supervisor ID	Job Title
00000374	Luis	Moreno	Retired	AA	Excep Hrly	00403158	Constructi
00000468	Randall	Camacho	Active	AA	Hourly	00011998	Waste Trac
00000486	Juan	Guillama	Retired	AZ	Hourly	(blank)	Inactive C
00002052	Anthony	Clay	Active	AA	Hourly	00023568	Waste Supe

# Lesson 1: Discipline Management Cont'd

7. Select the **Disciplinary Resolution** tab.
8. Make sure to complete the mandatory and other relevant fields in the **Disciplinary Resolution** tab. In this example:
  - **Recommended Action:** Search and select **Resolution Type** from the **Look Up** pop-up window.
  - **Suspension Begin Date:** Type the date, or select the month, day, and year from the calendar icon when the suspension starts.
  - **Suspension End Date:** Type the date, or select the month, day, and year from the calendar icon when the suspension ends.
  - **Standardized Countywide Settlement Agreements and Letters:** Search and select **Agreement** from the **Look Up** pop-up window.
  - **Departmental Agreements:** Search and select **Departmental Agreements** from the **Look Up** pop-up window.
  - **Departmental Letters:** Search and select **Departmental Letters** from the **Look Up** pop-up window.

HR Administration

Disciplinary Action | Action Taken | **Disciplinary Resolution** | MD Appeals

Randall Camacho Person ID 00000468

Total Incident 1

**Disciplinary Resolution**

Reported Date 11/12/2024

Disciplinary Type DAR Disciplinary Action Report DAR Number 1447

Recommended Action [Search]

Final Action [Search]

Final Action Date [Calendar] Date Received [Calendar] Deadline Date [Calendar]

Suspension Begin Date [Calendar] Suspension End Date [Calendar]

Promotion Waived  Transfer Section Next Eligibility Date [Calendar]

**Standardized Countywide Settlement Agreements and Letters**

Agreements	Description		
1 [Search]		+	-

**Departmental Agreements**

Departmental Agreements	Description		
1 [Search]		+	-

**Departmental Letters**

Departmental Letter	Description		
1 [Search]		+	-

# Lesson 1: Discipline Management Cont'd

## 9. Scroll down, and then select **Save**.

**Departmental Letters**

1-1 of 1 | View All

	Departmental Letter	Description		
1	<input type="text"/>		+	-

Resolution Comments

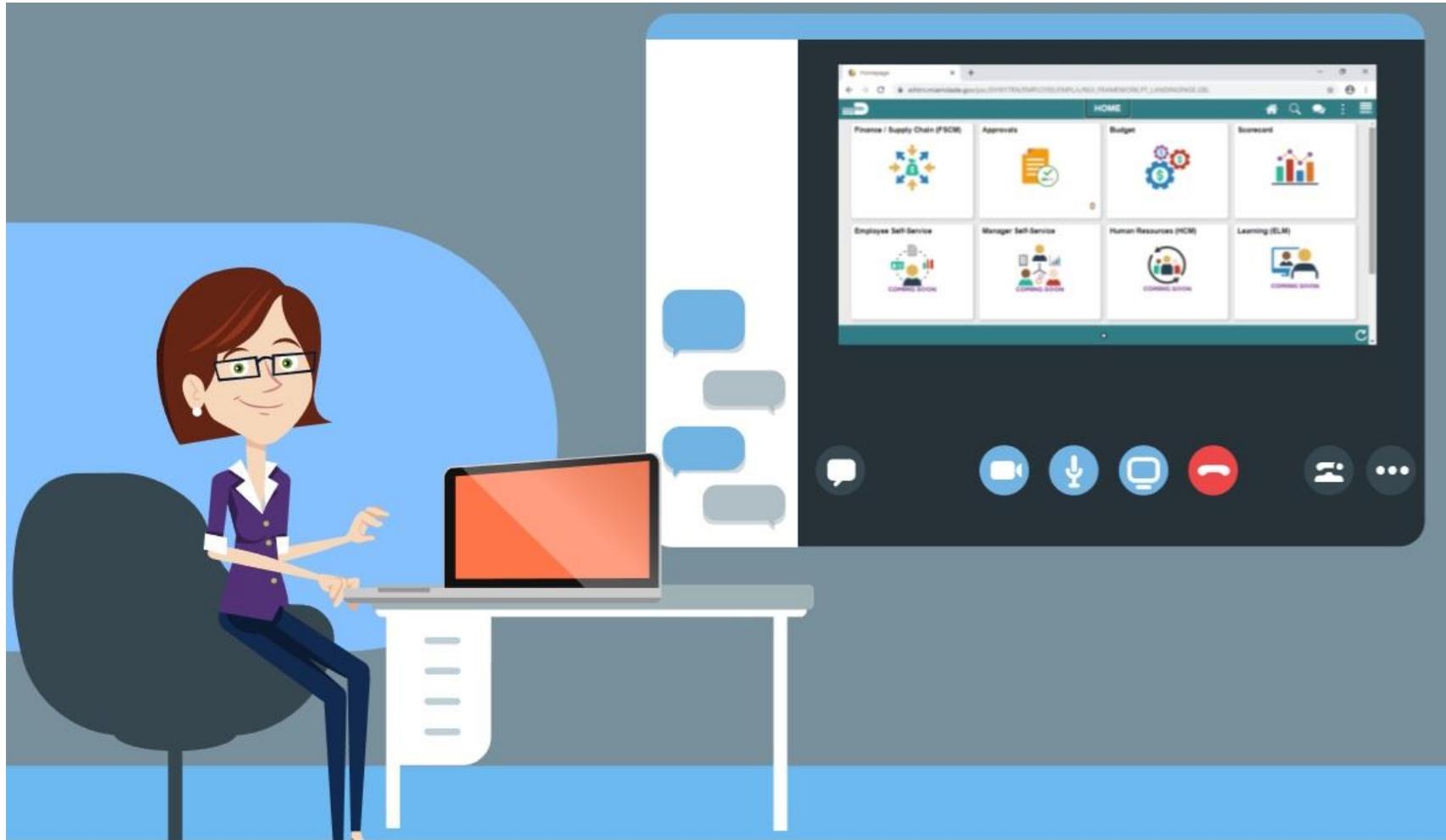
254 characters remaining

Print DAR      Print Notes

**Save**    Return to Search    Previous in List    Next in List    Notify

[Disciplinary Action](#) | [Action Taken](#) | [Disciplinary Resolution](#) | [MD Appeals](#)

# Lesson 1: Activities and Exercises



# Lesson 1: Lesson Summary

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

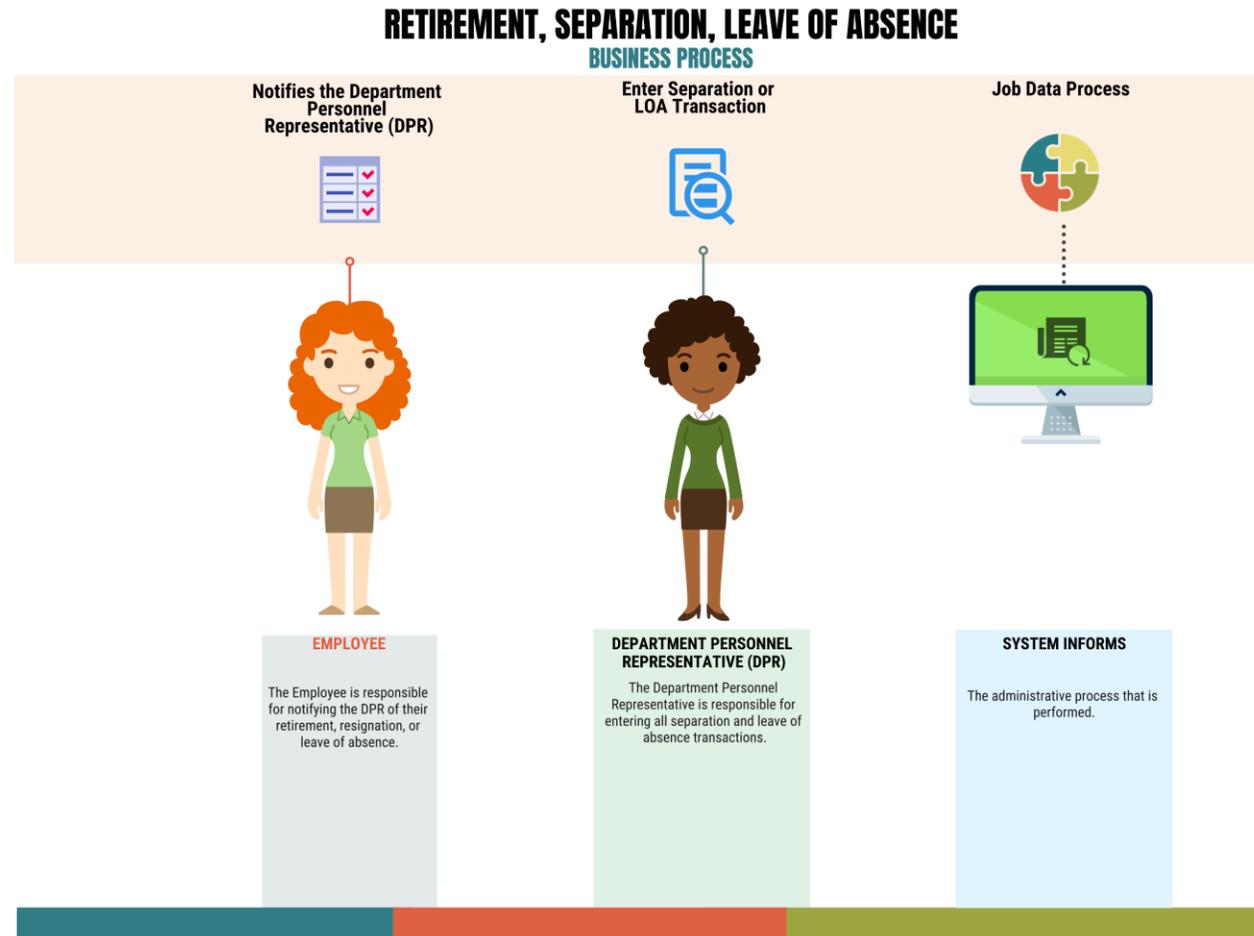
- Record employee Disciplinary Action and Action Taken Records
- Record employee Disciplinary Resolution Records

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions

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

- Complete a Voluntary / Involuntary Separation Transaction
- Complete a Leave of Absence Transaction
- Complete a Leave of Absence Return Transaction

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd



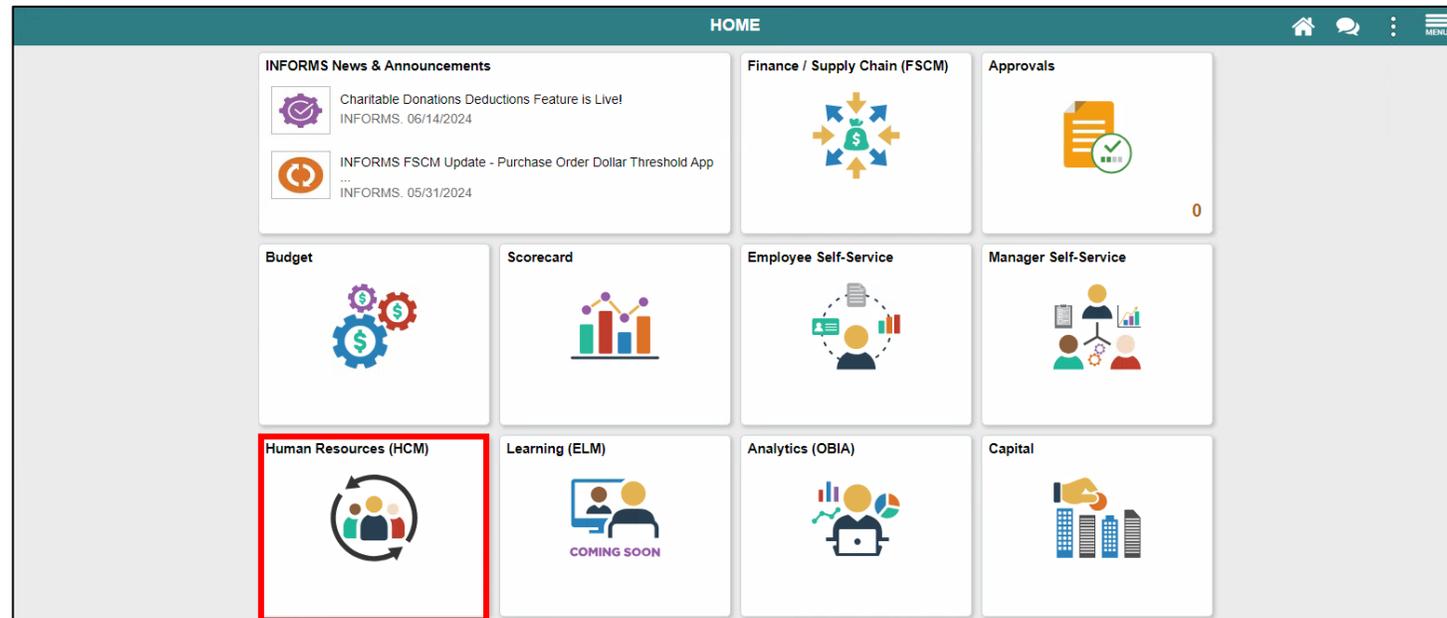
# Lesson 2: Key Terms

Term	Definition
<b>Retirement</b>	The employee's decision to permanently leave the County.
<b>Voluntary Separation</b>	The employee's decision to resign from the County.
<b>Leave of Absence</b>	Leave of Absence (LOA) is a request for an employee to be absent from work for a period of time.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

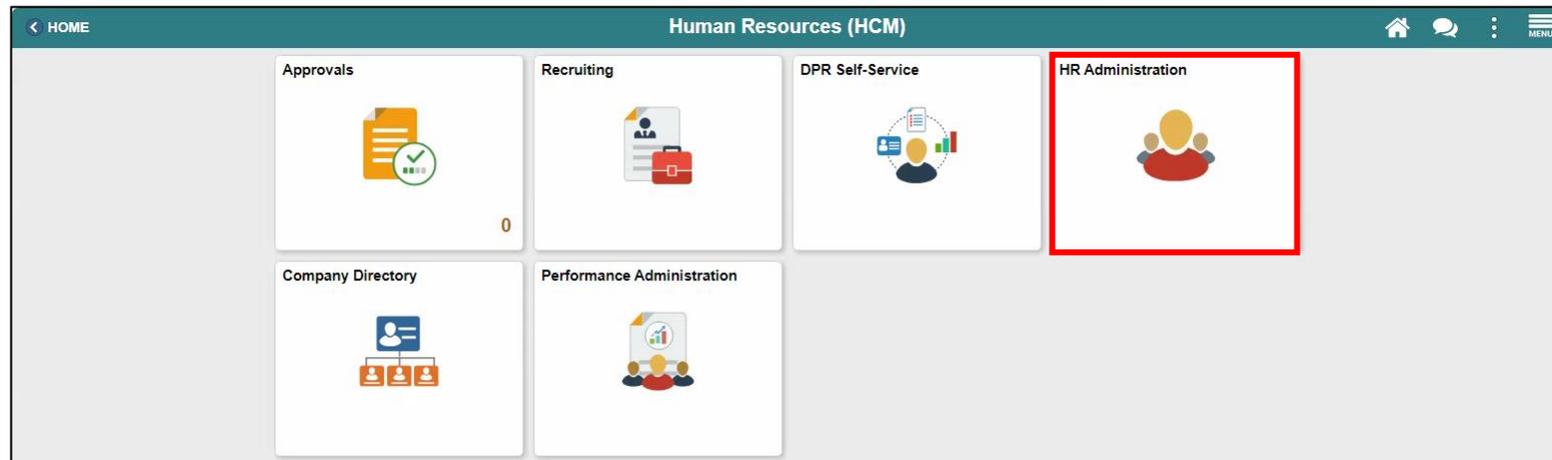
As a DPR, create a Retirement, Separation, and Leave of Absence Transaction in INFORMS.

1. Log into INFORMS and select **Human Resources (HCM)** from the home landing page below.



# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

## 2. Select HR Administration.



# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

3. Enter the applicable search parameters.
4. Select the **Search** button.

The screenshot displays the 'HR Administration' interface. On the left is a navigation menu with categories like 'Job Information', 'Headcount', and 'Labor Administration'. The main area is titled 'Job Data' and contains a search section. This section includes a 'Search Criteria' dropdown menu with several input fields, each with a 'begins with' dropdown and a text box. The fields are: Empl ID, Name, Last Name, Second Last Name, Alternate Character Name, and Middle Name. Below these fields are checkboxes for 'Include History' and 'Case Sensitive'. At the bottom of the search section, the 'Search' button is highlighted with a red box, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

5. Select the **Add a new row at row 1** button.

The screenshot displays the HR Administration interface for employee Marcela Diaz (Empl ID 00143546). The 'Work Location' tab is active, showing details for a position with the following information:

*Effective Date	10/15/2024	Go To Row	+ -
Effective Sequence	0	*Action	Position Change
HR Status	Active	*Reason	Transfer to Constitutional Off
Payroll Status	Active		Current
Position Number	00003202		CLERK 4
Position Entry Date	08/21/2023		Position Management Record
Regulatory Region	USA		United States
Company	EL		Elections
Business Unit	EL		Elections
Department	EL05030000		VOTING EQUIPMENT MANAGEMENT
Department Entry Date	08/21/2023		
Location	EL00000001		2700 NW 87TH AVE (Bay 3)
Establishment ID	MDC		Miami Dade County
		Date Created	11/07/2024
Last Start Date	06/18/2001		
Expected Job End Date			

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'. The 'Go To Row' button with the '+' sign is highlighted with a red box.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

## 6. Enter the applicable **Effective Date**.

- **Note:** The Effective Date for terminations must be one day after the employee's last day.

The screenshot displays the HR Administration interface for employee Marcela Diaz (Empl ID: 00143546). The 'Work Location Details' section is active, showing various fields and their values. The 'Effective Date' field is highlighted with a red box and contains the date 11/25/2024. Other fields include Effective Sequence (0), HR Status (Active), Payroll Status (Active), Position Number (00003202), Position Entry Date (08/21/2023), Regulatory Region (USA), Company (EL), Business Unit (EL), Department (EL05030000), Department Entry Date (08/21/2023), Location (EL00000001), Establishment ID (MDC), Last Start Date (06/18/2001), and Expected Job End Date. The interface also includes navigation tabs, a search bar, and a 'Go To Row' button.

Field	Value
Effective Date	11/25/2024
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Position Number	00003202
Position Entry Date	08/21/2023
Regulatory Region	USA
Company	EL
Business Unit	EL
Department	EL05030000
Department Entry Date	08/21/2023
Location	EL00000001
Establishment ID	MDC
Last Start Date	06/18/2001
Expected Job End Date	

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

## 7. Action list selections

- For Retirements
  - Select **Retirement**
- For Resignations / Involuntary Separation
  - Select **Termination**
- For Leave of Absence
  - Select **Leave of Absence**
- For Leave of Absence Return
  - Select **Return From Leave**

The screenshot displays the HR Administration interface for Marcela Diaz (Empl ID: 00143546). The 'Work Location Details' section is active, showing various fields such as Effective Date (11/25/2024), HR Status (Active), Position Number (00003202), and Department (VOTING EQUIPMENT MANAGEMENT). A dropdown menu for 'Action' is open, listing various transaction types. The 'Retirement' option is highlighted in red, indicating the selected action.

Field	Value
Effective Date	11/25/2024
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Position Number	00003202
Position Entry Date	08/21/2023
Regulatory Region	USA
Company	EL
Business Unit	EL
Department	EL05030000
Department Entry Date	08/21/2023
Location	EL00000001
Establishment ID	MDC
Last Start Date	06/18/2001
Expected Job End Date	

**Action List:**

- Position Change
- Hire
- Leave of Absence
- Long Term Disability with Pay
- Paid Leave of Absence
- Parental Leave
- Pay Rate Change
- Position Change
- Rehire
- Reinstatement
- Retirement**
- Retirement with Pay
- Return from Disability
- Return from Leave
- Short Term Disability with Pay
- Status Change
- Suspension
- Terminated with Benefits
- Terminated with Pay
- Termination
- Transfer

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

## 8. Reasons list selections

- For Retirements
  - Select the applicable retirement **Reason** from the list, such as **Retirement** or **Retired end of DROP**.

**Note:** The initiation of DROP is done through Central HR Benefits.

- For Resignations / Involuntary Separation
  - Select **Termination**
- For Leave of Absence
  - Select **Leave of Absence**
- For Leave of Absence Return
  - Select **Return From Leave**

The screenshot displays the HR Administration interface for employee Marcela Diaz (Empl ID: 00143546). The 'Work Location Details' section is active, showing various fields such as Effective Date (11/25/2024), HR Status (Inactive), Payroll Status (Retired), Position Number (00003202), and Position Entry Date (08/21/2023). A dropdown menu for 'Reason' is open, with a red box highlighting the following options: Disability Retirement, Line of Duty Disability, Retired end of DROP, and Retirement. The 'Retirement' option is currently selected.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

## 9. Select the **Save** button.

The screenshot displays the HR Administration interface for Marcela Diaz (Empl ID 00143546). The 'Work Location' tab is active, showing details for a retirement transaction. The 'Effective Date' is 11/25/2024, and the 'Action' and 'Reason' are both set to 'Retirement'. The 'Payroll Status' is 'Retired'. The 'Position Number' is 00003202 (CLERK 4), and the 'Position Entry Date' is 08/21/2023. The 'Department' is EL05030000 (VOTING EQUIPMENT MANAGEMENT). The 'Last Date Worked' is 11/24/2024. The 'Save' button is highlighted with a red box.

Work Location Details	
*Effective Date	11/25/2024
Effective Sequence	0
HR Status	Inactive
Payroll Status	Retired
*Action	Retirement
*Reason	Retirement
Position Number	00003202 CLERK 4
Position Entry Date	08/21/2023
Regulatory Region	USA United States
Company	EL Elections
Business Unit	EL Elections
Department	EL05030000 VOTING EQUIPMENT MANAGEMENT
Department Entry Date	08/21/2023
Location	EL00000001 2700 NW 87THAVE (Bay 3)
Establishment ID	MDC Miami Dade County
Date Created	11/25/2024
Last Start Date	06/18/2001
Termination Date	11/24/2024
Expected Job End Date	
Last Date Worked	11/24/2024

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

10. Notice the **Termination Date** is one day prior to the **Effective Date**.

The screenshot displays the 'Work Location Details' for employee Marcela Diaz (Empl ID 00143546). The interface includes a left-hand navigation menu with categories like Job Information, Job Data, Headcount, Labor Administration, HR Configuration, and OnBoarding. The main content area shows various fields for the work location, with two specific dates highlighted in red boxes: the Effective Date (11/25/2024) and the Termination Date (11/24/2024). The Termination Date is one day prior to the Effective Date. Other fields include Effective Sequence (0), HR Status (Inactive), Payroll Status (Retired), Position Number (00003202), and Department (VOTING EQUIPMENT MANAGEMENT).

Field	Value
*Effective Date	11/25/2024
Effective Sequence	0
HR Status	Inactive
Payroll Status	Retired
*Action	Retirement
*Reason	Retirement
Position Number	00003202
Position Entry Date	08/21/2023
Regulatory Region	USA
Company	EL
Business Unit	EL
Department	EL05030000
Department Entry Date	08/21/2023
Location	EL00000001
Establishment ID	MDC
Last Start Date	06/18/2001
Expected Job End Date	
Last Date Worked	11/24/2024
Termination Date	11/24/2024

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

11. Navigate to the **Maintain Time Reporter Data** page via Navbar: **Human Capital Management (HCM) > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data**

The screenshot shows the 'Maintain Time Reporter Data' page in a web browser. The page title is 'Maintain Time Reporter Data' and the breadcrumb path is '< OME Maintain Time Reporter Data'. The page contains a search form with the following fields:

- Find an Existing Value** (button)
- Search Criteria** (dropdown menu)
  - Empl ID: begins with [ ]
  - Name: begins with [ ]
  - Last Name: begins with [ ]
  - Business Unit: begins with [ ]
  - Department: begins with [ ]
  - Workgroup: begins with [ ]
- Organizational Relationship: = [ ]
- Include History  Case Sensitive

At the bottom of the form, there are buttons for **Search**, **Clear**, [Basic Search](#), and [Save Search Criteria](#).

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

12. Enter the applicable search parameters.
13. Select the **Search** button.

The screenshot shows the 'Maintain Time Reporter Data' interface. At the top, there is a header with '< OME' on the left, 'Maintain Time Reporter Data' in the center, and navigation icons (home, chat, menu) on the right. Below the header, the title 'Maintain Time Reporter Data' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A green button labeled 'Find an Existing Value' is positioned above the search criteria section. The search criteria section is enclosed in a red box and includes the following fields: 'Empl ID' (dropdown: 'begins with', text input), 'Name' (dropdown: 'begins with', text input), 'Last Name' (dropdown: 'begins with', text input), 'Business Unit' (dropdown: 'begins with', text input), 'Department' (dropdown: 'begins with', text input), 'Workgroup' (dropdown: 'begins with', text input), and 'Organizational Relationship' (dropdown: '=', text input). Below these fields are two checkboxes: 'Include History' and 'Case Sensitive'. At the bottom of the search criteria section, there is a red box around the 'Search' button, followed by a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

14. Select the **Add** button.

**Maintain Time Reporter Data**

Marcela Diaz ID 00143546  
Organizational Relationship Employee Badge Detail Group Membership

**Time Reporter Data** 1 of 1 View All

\*Effective Date 08/21/2023 \*Status Active **+** -

\*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template MDCELAPSED Miami Dade Common Elapsed Tmpl

Punch Time Template

Time Period ID

\*Workgroup K-NJB Bargaining Unit K - Non JB

\*Taskgroup PSNONCATSK Commitment Accounting

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4

Rule Element 5

Time Zone EST Eastern Time (US)

Payroll  
 Send Time to Payroll

Commitment Accounting  
 For Taskgroup  
 For Department

Save Return to Search Notify Refresh Update/Display Include History

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

15. Select **Inactive** from the **Status** dropdown.

The screenshot displays the 'Maintain Time Reporter Data' interface for employee Marcela Diaz (ID: 00143546). The 'Status' dropdown menu is open, showing 'Active' and 'Inactive' options. The 'Inactive' option is highlighted with a red box. The interface includes various fields for configuration, such as Effective Date (11/25/2024), Time Reporter Type (Elapsed Time Reporter), Elapsed Time Template (MDCELAPSED), and Workgroup (K-NJB). The 'Commitment Accounting' section is also visible, with checkboxes for 'For Taskgroup' and 'For Department'. The interface includes navigation buttons like 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

# Lesson 2: Retirement, Separation, and Leave of Absence Transactions Cont'd

16. Select the **Save** button.

The screenshot shows the 'Maintain Time Reporter Data' interface for employee Marcela Diaz (ID 00143546). The page includes a search bar, navigation links, and a list of fields for configuration. The 'Save' button is highlighted with a red box.

**Maintain Time Reporter Data**  
Marcela Diaz | ID 00143546  
Organizational Relationship: Employee | Badge Detail | Group Membership

**Time Reporter Data** | 1 of 2 | View All

\*Effective Date: 11/25/2024  
\*Time Reporter Type: Elapsed Time Reporter  
Elapsed Time Template: MDCELAPSED (Miami Dade Common Elapsed Tmpl)  
Punch Time Template: [Search]  
Time Period ID: [Search]  
\*Workgroup: K-NJB (Bargaining Unit K - Non JB)  
\*Taskgroup: PSNONCATSK (Commitment Accounting)  
Task Profile ID: [Search]  
TCD Group: [Search]  
Restriction Profile ID: [Search]  
Rule Element 1: [Search]  
Rule Element 2: [Search]  
Rule Element 3: [Search]  
Rule Element 4: [Search]  
Rule Element 5: [Search]  
Time Zone: EST (Eastern Time (US))

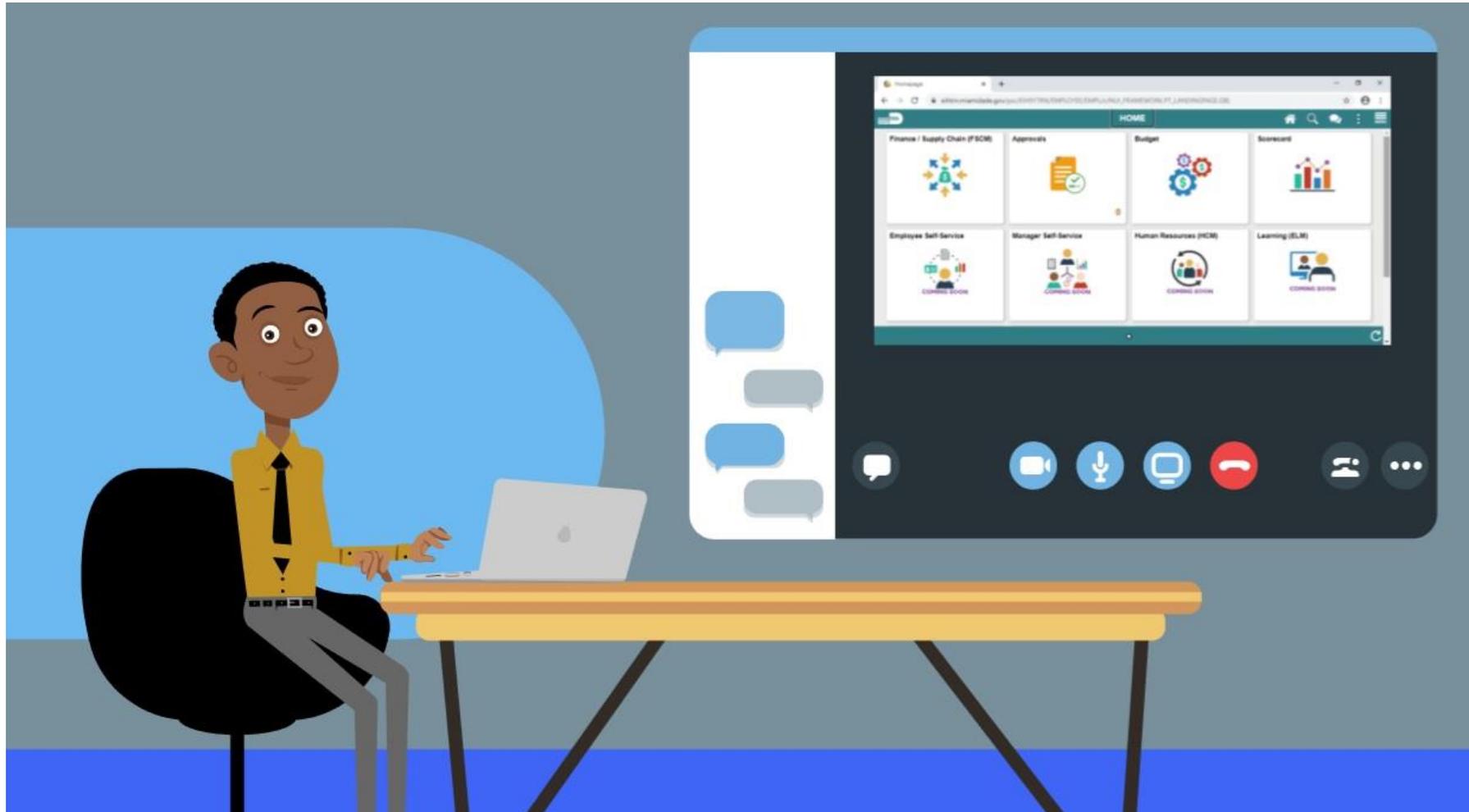
\*Status: Inactive

**Payroll**  
 Send Time to Payroll

**Commitment Accounting**  
 For Taskgroup  
 For Department

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

# Lesson 2: Activities and Exercises



# Lesson 2: Lesson Summary

Now that you have completed the Submit Retirement and Voluntary/Involuntary Separation Transactions lesson, you should be able to:

- Complete a Voluntary / Involuntary Separation Transaction
- Complete a Leave of Absence Transaction
- Complete a Leave of Absence Return Transaction

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Course Content Summary

Congratulations on completing the Update Team Information course. You now understand:

- Record and Manage Disciplinary Records of Employees
- Record Retirement, Separation, and Leave of Absence Transactions

For more information on INFORMS, please visit [MiamiDade.gov/informs](http://MiamiDade.gov/informs)

# Additional Training and Job Aids

Other training materials, related to this topic, include:

- DPR 301 – ePerformance Management (Employee Performance Evaluation)
- DPR 302 – Personnel Changes
- DPR 303 – Time Management
- DPR 321 – Recruitment

You also have the following resources available to you:

- Job Aids
  - Submit a Retirement Request
  - Submit Retirement and Voluntary – Involuntary Separation (DPR)
  - Submit a LOA Request
  - Submit a LOA Return Request

For additional information, be sure to visit: [www.miamidade.gov/informs](http://www.miamidade.gov/informs)



**CONGRATULATIONS**

Congratulations on successfully completing the Update Team Information course!

**DPR 304 - Updating Team Information**