

**Miami-Dade County**



---

## **End User Training Resource Guide**

**Course Code: DPR 321**

**Course: Recruitment**

***Updated 12-13-2024***

## Guide Overview

### Guide Description

This guide provides a comprehensive review of the recruitment processes. Topics include creating a job opening, screening applicants for minimum qualifications and preferences, employment offer and acceptance, preparing for hire, and managing hires.

This guide consists of the following modules:

- Module 1: Introduction
- Module 2: Recruitment
- Module 3: Summary

## Table of Contents

Content	Page
<b>Module 1: Course Introduction.....</b>	<b>4</b>
<b>Module 2: Recruitment .....</b>	<b>11</b>
Lesson 1: Create a Job Opening.....	12
Lesson 2: Candidate Selection .....	20
Lesson 3: Employment Offer and Acceptance.....	30
Lesson 4: Onboarding Activities .....	39
<b>Module 3: Course Summary .....</b>	<b>57</b>

## Module 1: Introduction

### Topics

This module covers the following topics:

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



## Module 1: Introduction

### Learning Objectives

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

- Create a Job Opening
- Screen Applicants for Minimum Qualifications and Preferences and Apply Points
- Employment Offer
- Prepare for Hire
- Manage Hire
- Transfer an Employee (Lateral)
- Verify the Employee Transfer

## Module 1: Introduction

### Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

### Roles and

### Responsibilities

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

## Module 1: Introduction

### Purpose and Benefits

The purpose and benefits of the INFORMS Recruitment business process include:

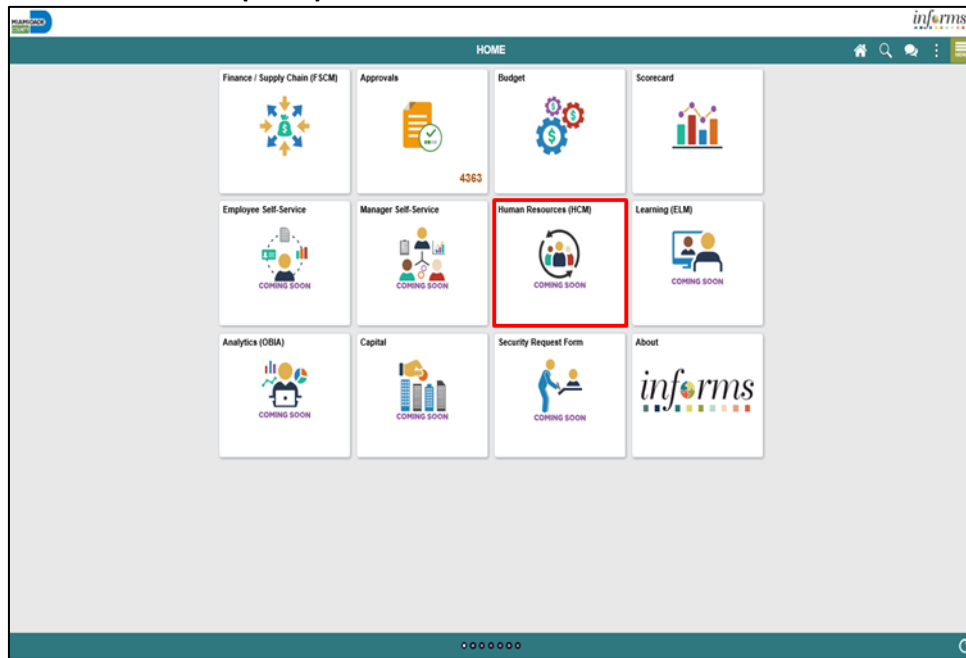
- Automation of County business processes.
- Job Opening - Defaults from Position details.
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate.
- Integrated payment and accounting for expense reimbursement.
- Consolidated Benefit Billing System – Leave Of Absence (LOA), retirees, and benefit billing all in one system.
- Data persistence – INFORMS data is never deleted, only past-effective dated.
- Decreased data redundancy - Perform all recruit to hire activities in a single common system - eliminating manual data re-keying.
- Employee empowerment - employee self-service and manager self-service interfaces are intuitive, easy to use and available on demand on multiple devices and platforms.
- Enhanced data retrieval - rapid pro forma and ad hoc report development and deployment capabilities.
- Robust technical platform – high on-demand availability with minimum downtime, scalable and extensible, rapid deployment of system upgrades, continuous improvement, iterative development, data security.
- Streamlined operations - Automated email notifications, approval routing, consistent business process between Departments, electronic signatures, reduced processing time with online transaction processing, rapid data retrieval via ad hoc query capability, seamless integration between County systems.
- Company – A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets.

## Module 1: Introduction

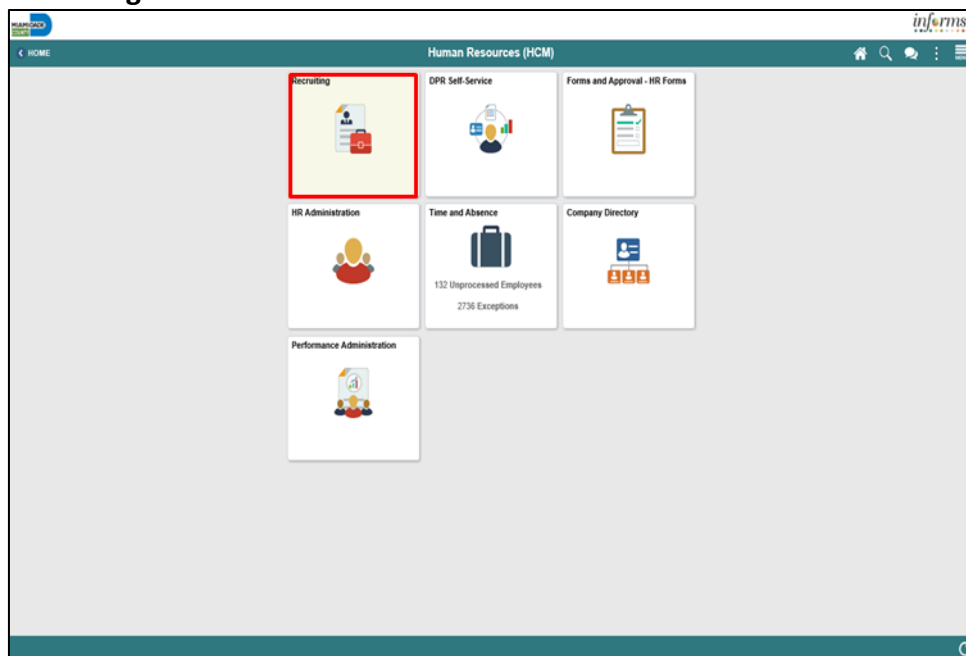
### Navigation

Below are the steps to navigate to the Recruiting module, which will be used for navigation in the rest of this guide:

#### 1. Human Resource (HCM)

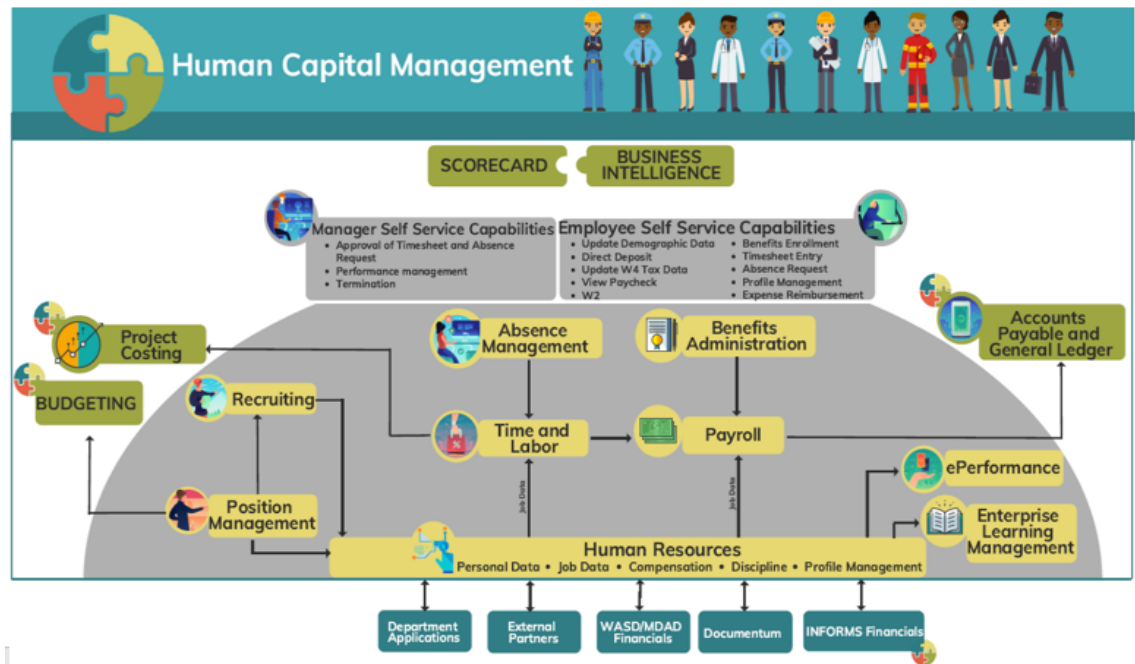


#### 2. Recruiting



## Module 1: Introduction

### The End-to-End Business Process



## Module 1: Introduction

### Module 1: Introduction Summary

The following key concepts were covered in this module:

- Introduction

## Module 2: Recruitment

### Module 2: Recruitment

This module includes the following lessons:

- Create a Job Opening
- Candidate Selection
- Employment Offer and Acceptance
- Onboarding Activities
- Reports and Queries

## Lesson 1: Create a Job Opening

### Lesson 1: Overview

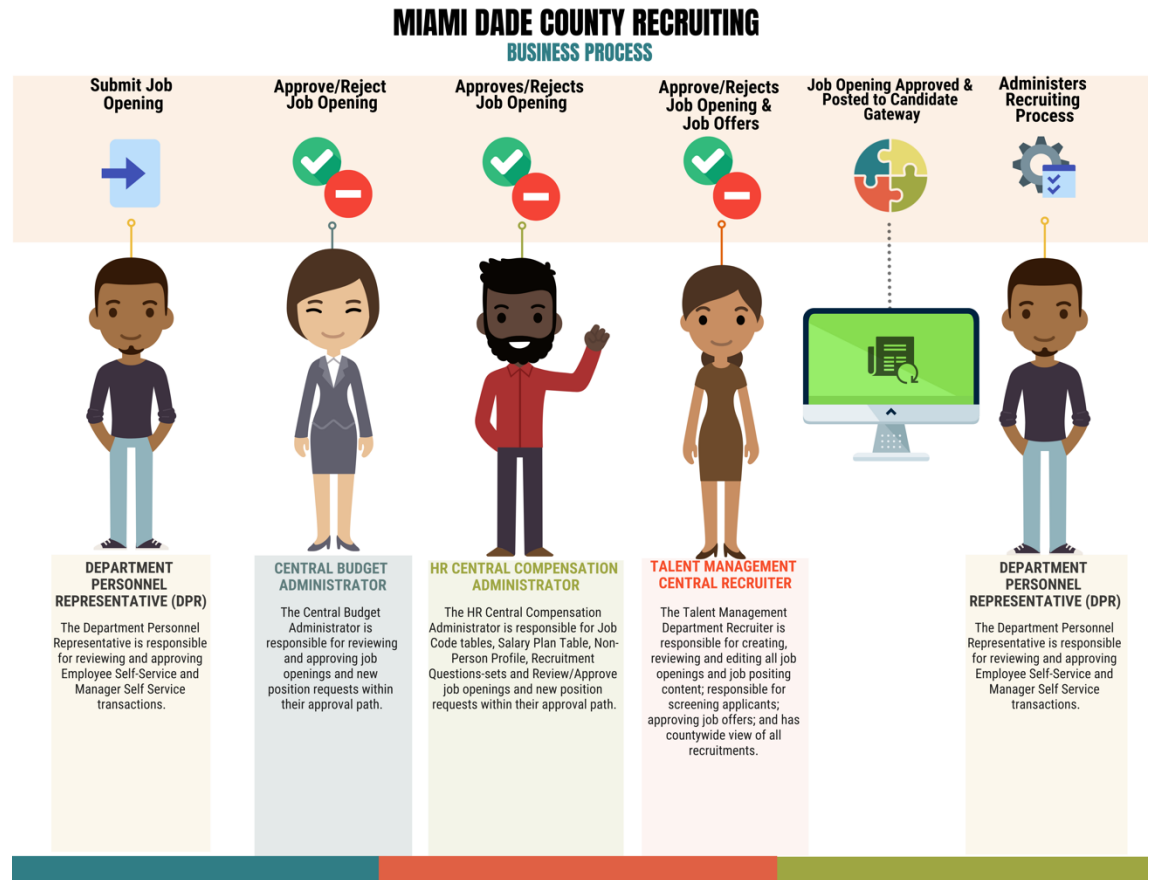
At the conclusion of this lesson, the user will be able to:

- Create a Job Opening



## Lesson 1: Create a Job Opening

### Lesson 1: Introduction

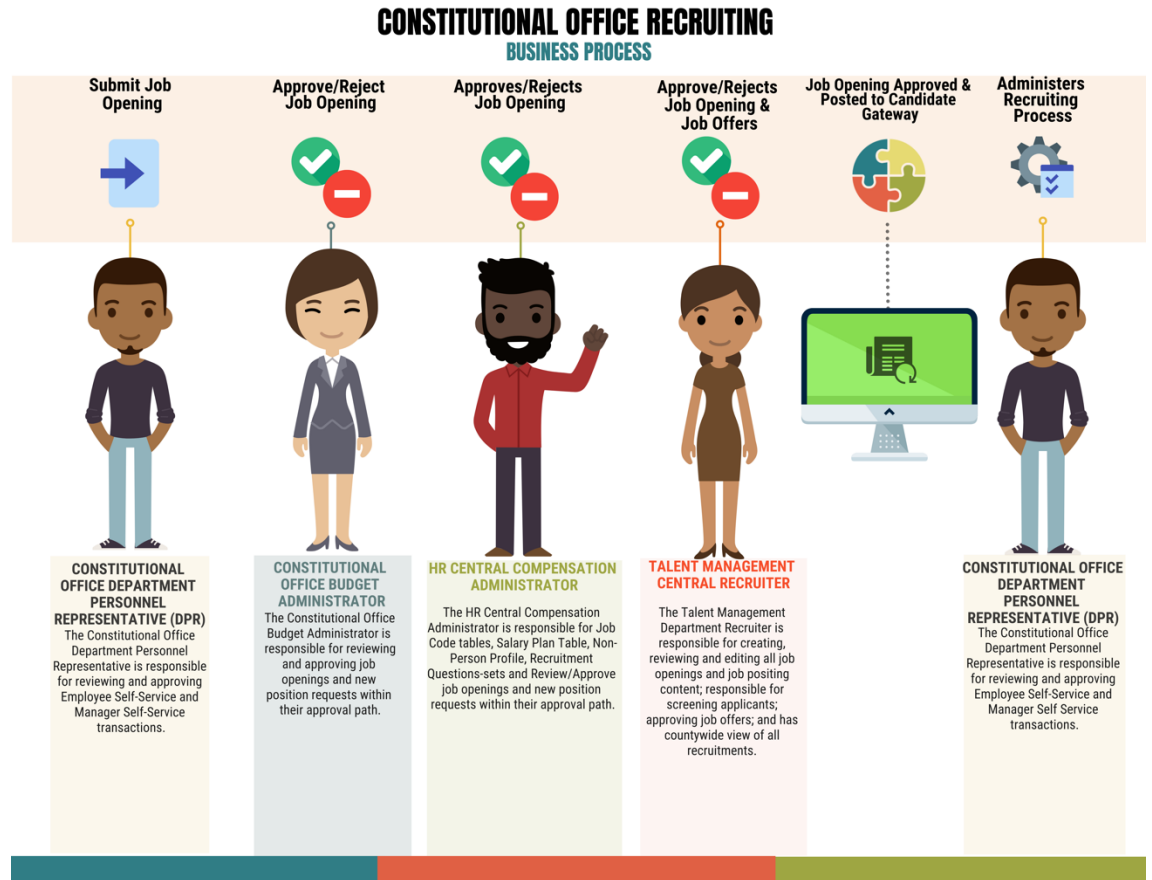


In the Recruitment business process, job openings are created, approved, and posted for advertisement. This lesson will review opening a job and selecting a posting location and duration.

Job openings are created from positions. The position details are automatically populated for job openings. A new position does not need to be created each time there is a new job opening. Departments can work with Central HR for enhanced applicant screening.

## Lesson 1: Create a Job Opening

### Lesson 1: Introduction



Constitutional Office job openings will be approved by the Constitutional Office Budget Administrator.

## Lesson 1: Create a Job Opening

### Key Terms

The following key terms are used in this module:



Term	Definition
<b>Recruiting Location</b>	The location in which the job will be performed. When jobs are posted, the recruiting location is visible to applicants.
<b>Job Profile</b>	The set of competencies and responsibilities that apply to workers in the same job, position, or salary grade.
<b>Recruitment Contact</b>	The HR Central Recruitment contact for the open job.
<b>Recruitment Area</b>	The location in which the interview will take place.
<b>Recruiter</b>	The department's representative and contact for the open job.
<b>Relative Open Date</b>	The date in which a job will be visible to applicants in relation to the approval date. The system calculates the posting date and displays it in the <b>Post Date</b> field, which becomes unavailable for entry.
<b>Company</b>	A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets.

## Lesson 1: Create a Job Opening

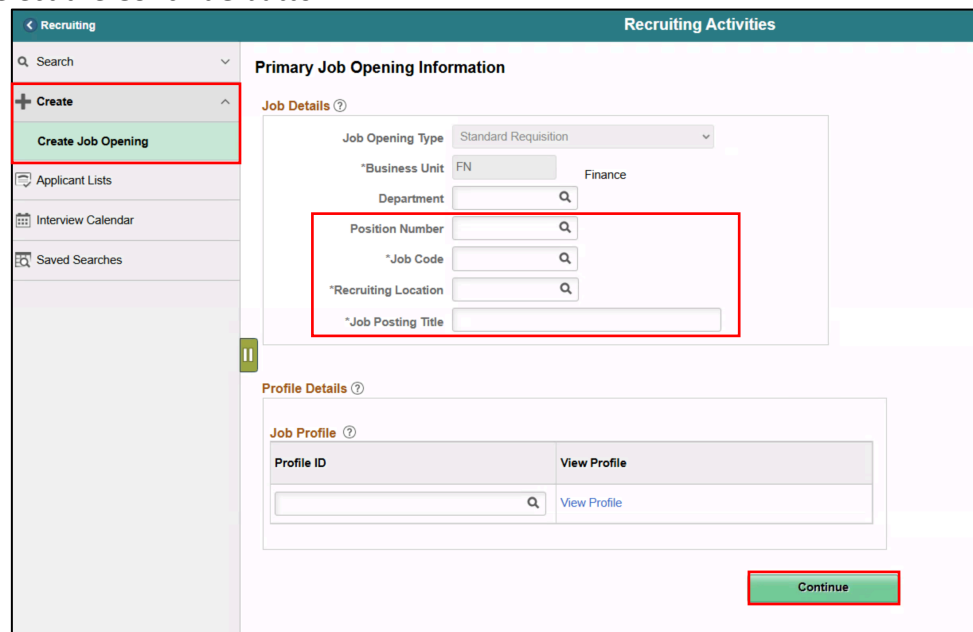
### Lecture 1: Create a Job Opening

This lesson will review how to create a job opening. Departments can attach the question sets specific to the job opening in the advertisement with compensation approval and work with Central HR for enhanced screening.

**Note:** To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

1. Select the **Create** pane.
2. Select the **Create Job Opening** pane.
3. Input or search for the **Position Number**.
4. Input or search for the **Recruiting Location** number.
5. Select the **Continue** button.

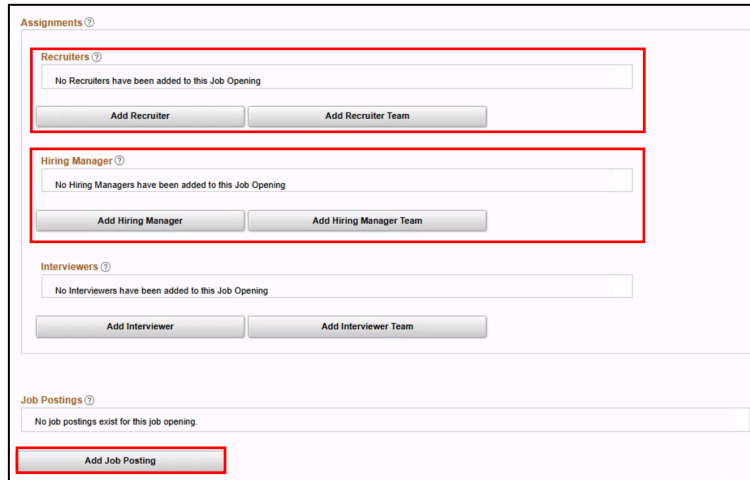


Adding the **Recruiter** and **Hiring Manager** details allows the user to have a complete view of the hiring process. This also allows for detailed reporting, transparency, and tracking.

6. Select the **Add Recruiter** button.
7. Input or search for the **Name** details.
8. Select the **Add Hiring Manager** button.
9. Input or search for the **Name** details.
10. Select the **Add Job Posting** button.

## Lesson 1: Create a Job Opening

### Lecture 1: Create a Job Opening



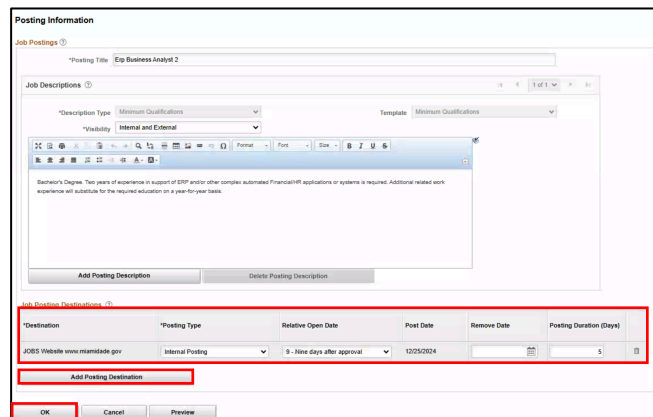
11. Select the applicable **Destination** from the list.
12. Select the applicable **Posting Type** from the list.
13. Input the posting duration details.
  - a. Select the **Relative Open Date** from the list, if applicable.
  - b. Input the **Post Date**, if applicable.
  - c. Input the **Remove Date**, if applicable.
  - d. Input the **Posting Duration**, if applicable.

When utilizing a **Relative Open Date**, the **Posting Duration** need to be input OR the **Remove Date** needs to be input.

When not utilizing the **Relative Open Date** field, the **Post Date** needs to be input.

When the **Post Date** is input, the **Remove Date** OR the **Posting Duration** needs to be added.

The **Posting Duration** assists in calculating the **Remove Date** based on the **Post Date**.



## Lesson 1: Create a Job Opening

### Lecture 1: Create a Job Opening

**Note:** If posting in more than one location, repeat steps 11-16.

15. Select the **OK** button.
16. Select the **Save and Submit** button.

**Note:** Select the **Approvals** tab to review pending approvals.

## Lesson 1: Create a Job Opening

### Lesson Summary

Having completed the Create a Job Opening lesson, users should be able to:

- Create a Job Opening



## Lesson 2: Candidate Selection

### Lesson 2: Overview

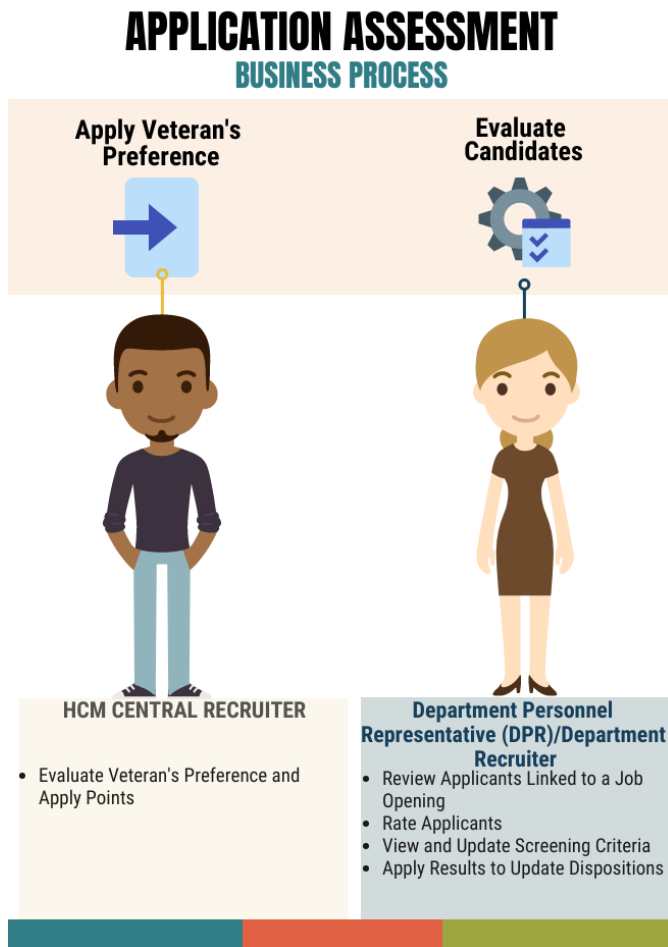
At the conclusion of this lesson, the user will be able to:

- Screen Applicants for Minimum Qualifications and Preferences then Apply Results



## Lesson 2: Candidate Selection

### Lesson 2: Introduction



Once the job opening has closed the HCM Central Recruiter will review applicants and apply Veteran's Preference points to applicants that are claiming preference. The applicants must submit Veteran's Preference documentation before Central Recruiter can award points. This preference will be visible to the Department Recruiter when reviewing applicants.

The Department Recruiter will start the screening process to develop an eligible candidate pool for interview consideration. Once the minimum qualifications screening process has been completed, results will be applied in the system.

**Note:** Companies (Miami Dade County and each Constitutional Office) will have a company identifier in Candidate Gateway.

## Lesson 2: Candidate Selection

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Company Identifier</b>	An identifier associated with each Employee that determines which Company (i.e. Miami Dade County or a Constitutional Office) that they are employed by. This company identifier will allow Constitutional Office employees to be distinguished from Miami Dade County employees.
<b>Veteran's Preference Points</b>	Veteran' Preference Points are awarded based on the documentation provided by the candidate to HR Central Recruitment.

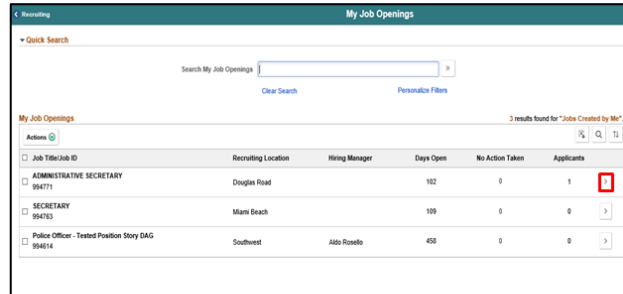
## Lesson 2: Candidate Selection

### Lecture 1: Screen Applicants for Minimum Qualifications and Preferences then Apply Results

**Note:** To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

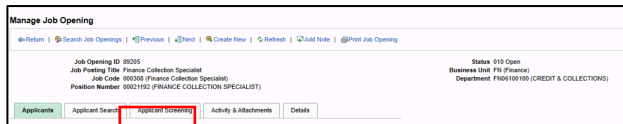
Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

1. Select the **View Job Opening** button.



Job Title/Job ID	Recruiting Location	Hiring Manager	Days Open	No Action Taken	Applicants
ADMINISTRATIVE SECRETARY 994771	Douglas Road		102	0	1
SECRETARY 994763	Miami Beach		109	0	0
Police Officer - Testbed Position Story DAG 994814	Southwest	Alto Rosello	408	0	0

2. Select the **Applicant Screening** tab.

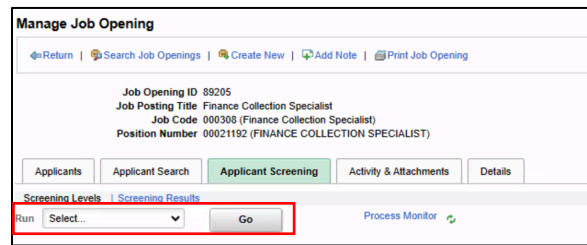


Manage Job Opening	
<a href="#">Home</a> > <a href="#">Search Job Openings</a> > <a href="#">Previous</a> > <a href="#">Next</a> > <a href="#">Create New</a> > <a href="#">Refresh</a> > <a href="#">Add Note</a> > <a href="#">First Job Opening</a>	Status: 010 Open Business Unit: F16 (Finance) Department: F160100100 (CREDIT & COLLECTIONS)
Job Opening ID: 99295 Job Posting Title: Finance Collection Specialist Job Code: 000300 (Finance Collection Specialist) Position Number: 00021192 (FINANCE COLLECTION SPECIALIST)	
<a href="#">Applicants</a>   <a href="#">Applicant Search</a>   <a href="#">Applicant Screening</a>   <a href="#">Activity &amp; Attachments</a>   <a href="#">Details</a>	

## Lesson 2: Candidate Selection

Lecture 1:  
Screen  
Applicants for  
Minimum  
Qualifications  
and Preferences  
then Apply  
Results

3. Select the **Run** list.
4. Select the **Minimum Qualifications** list item.
5. Select the **Go** button.



Manage Job Opening

Return | Search Job Openings | Create New | Add Note | Print Job Opening

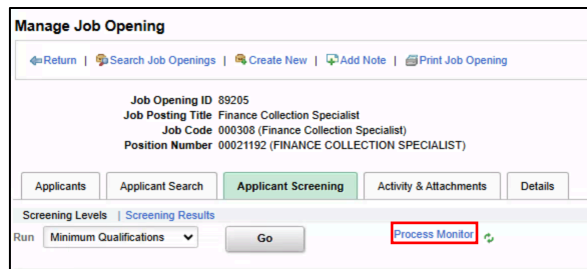
Job Opening ID: 89205  
Job Posting Title: Finance Collection Specialist  
Job Code: 000308 (Finance Collection Specialist)  
Position Number: 00021192 (FINANCE COLLECTION SPECIALIST)

Applicants | Applicant Search | **Applicant Screening** | Activity & Attachments | Details

Screening Levels | Screening Results

Run: Select... **Go** Process Monitor

7. Select the **Process Monitor** link.



Manage Job Opening

Return | Search Job Openings | Create New | Add Note | Print Job Opening

Job Opening ID: 89205  
Job Posting Title: Finance Collection Specialist  
Job Code: 000308 (Finance Collection Specialist)  
Position Number: 00021192 (FINANCE COLLECTION SPECIALIST)

Applicants | Applicant Search | **Applicant Screening** | Activity & Attachments | Details

Screening Levels | Screening Results

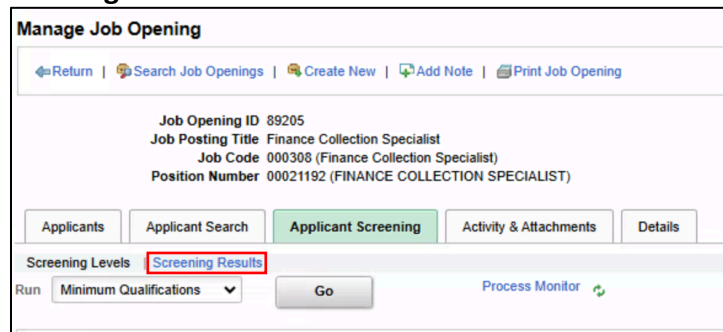
Run: Minimum Qualifications **Go** **Process Monitor**

**Note:** A new window will open. Select the **Refresh** button until **Run Status = Success** and **Distribution Status = Posted**.

## Lesson 2: Candidate Selection

Lecture 1:  
Screen  
Applicants for  
Minimum  
Qualifications  
and Preferences  
then Apply  
Results

8. Select the **Screening Results** link.



**Manage Job Opening**

[Return](#) | 
 [Search Job Openings](#) | 
 [Create New](#) | 
 [Add Note](#) | 
 [Print Job Opening](#)

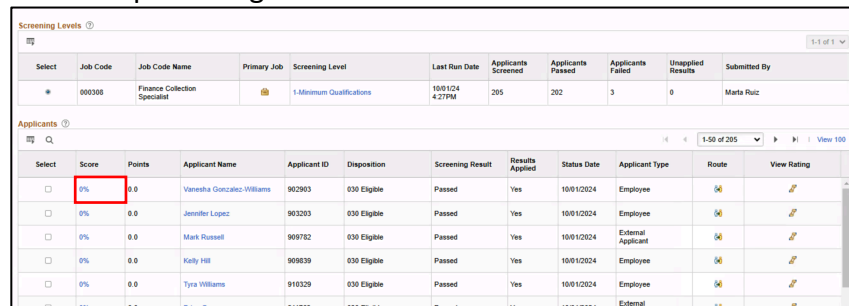
Job Opening ID 89205  
 Job Posting Title Finance Collection Specialist  
 Job Code 000308 (Finance Collection Specialist)  
 Position Number 00021192 (FINANCE COLLECTION SPECIALIST)

[Applicants](#) | 
 [Applicant Search](#) | 
 [Applicant Screening](#) | 
 [Activity & Attachments](#) | 
 [Details](#)

Screening Levels **Screening Results**

Run Minimum Qualifications [Go](#) [Process Monitor](#)

9. Select the **Score** percentage link.



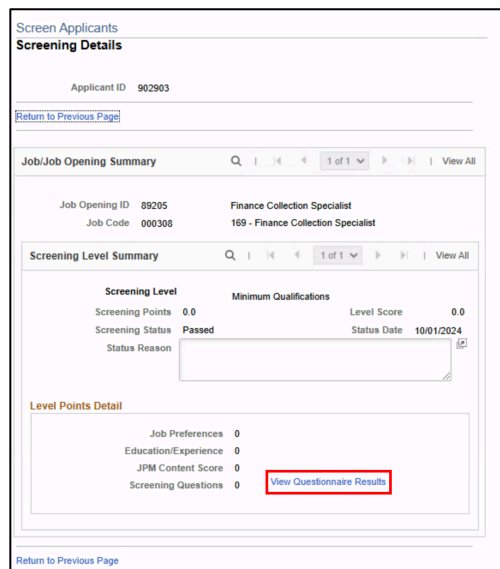
**Screening Levels**

Select	Job Code	Job Code Name	Primary Job	Screening Level	Last Run Date	Applicants Screened	Applicants Passed	Applicants Failed	Unapplied Results	Submitted By
*	000308	Finance Collection Specialist		1 Minimum Qualifications	10/9/24 4:27PM	205	202	3	0	Marta Ruiz

**Applicants**

Select	Score	Points	Applicant Name	Applicant ID	Disposition	Screening Result	Results Applied	Status Date	Applicant Type	Route	View Rating
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Vanessa Gonzalez-Williams	902903	030 Eligible	Passed	Yes	10/9/2024	Employee	<a href="#">View</a>	<a href="#">Rating</a>
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Jennifer Lopez	903203	030 Eligible	Passed	Yes	10/9/2024	Employee	<a href="#">View</a>	<a href="#">Rating</a>
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Mark Russell	900782	030 Eligible	Passed	Yes	10/9/2024	External Applicant	<a href="#">View</a>	<a href="#">Rating</a>
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Kelly Hill	909839	030 Eligible	Passed	Yes	10/9/2024	Employee	<a href="#">View</a>	<a href="#">Rating</a>
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Tyra Williams	910329	030 Eligible	Passed	Yes	10/9/2024	Employee	<a href="#">View</a>	<a href="#">Rating</a>
<input type="checkbox"/>	<a href="#">0%</a>	0.0	Brian Davis	911783	030 Eligible	Passed	Yes	10/9/2024	External	<a href="#">View</a>	<a href="#">Rating</a>

18. Select the **View Questionnaire Results** link.



**Screen Applicants**

**Screening Details**

Applicant ID 902903

[Return to Previous Page](#)

**Job/Job Opening Summary**

Job Opening ID 89205 Finance Collection Specialist  
 Job Code 000308 169 - Finance Collection Specialist

**Screening Level Summary**

Screening Level Minimum Qualifications  
 Screening Points 0.0 Level Score 0.0  
 Screening Status Passed Status Date 10/01/2024  
 Status Reason

**Level Points Detail**

Job Preferences 0  
 Education/Experience 0  
 JPM Content Score 0  
 Screening Questions 0 [View Questionnaire Results](#)

[Return to Previous Page](#)

## Lesson 2: Candidate Selection

Lecture 1:  
Screen  
Applicants for  
Minimum  
Qualifications  
and Preferences  
then Apply  
Results

19. Select the **Return to Previous Page** link.

Screen Applicants

**Questionnaire Results**

Vanesha Gonzalez-Williams

Applicant ID 902903

Screening Level Minimum Qualifications

[Return to Previous Page](#)

**CORRECT** Do you have a High school diploma or GED?

**Skills Question**

<input type="checkbox"/>	Yes		
<input type="checkbox"/>	No		

**CORRECT** Do you have one year of collection experience, customer service, or public contact, or have you completed college coursework that may substitute for the required work experience on a year-for-year basis?

**Skills Question**

<input type="checkbox"/>	Yes		
<input type="checkbox"/>	No		

Subtotal 0

[Return to Previous Page](#)

20. Select the **Return to Previous Page** link.

Screen Applicants

**Screening Details**

Applicant ID 902903

[Return to Previous Page](#)

**Job/Job Opening Summary** [View All](#)

Job Opening ID 89205 Finance Collection Specialist  
Job Code 000308 169 - Finance Collection Specialist

**Screening Level Summary** [View All](#)

Screening Level	Minimum Qualifications	Level Score
Screening Points 0.0		0.0
Screening Status Passed		Status Date 10/01/2024
Status Reason		

**Level Points Detail**

Job Preferences	0
Education/Experience	0
JPM Content Score	0
Screening Questions	0

[View Questionnaire Results](#)

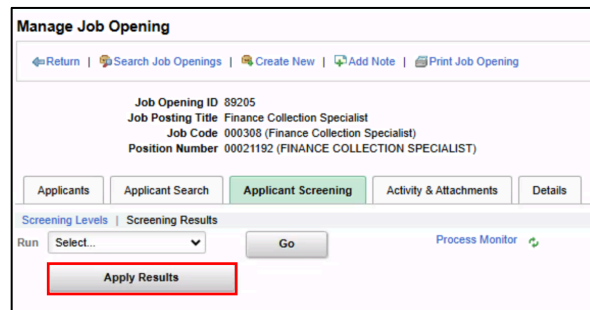
[Return to Previous Page](#)

## Lesson 2: Candidate Selection

### Lecture 1: Screen Applicants for Minimum Qualifications and Preferences then Apply Results

**Note:** Once results are applied to the candidate, they are permanent and cannot be undone.

21. Select the **Apply Results** button.



**Manage Job Opening**

Return | Search Job Openings | Create New | Add Note | Print Job Opening

Job Opening ID 89205  
Job Posting Title Finance Collection Specialist  
Job Code 000308 (Finance Collection Specialist)  
Position Number 00021192 (FINANCE COLLECTION SPECIALIST)

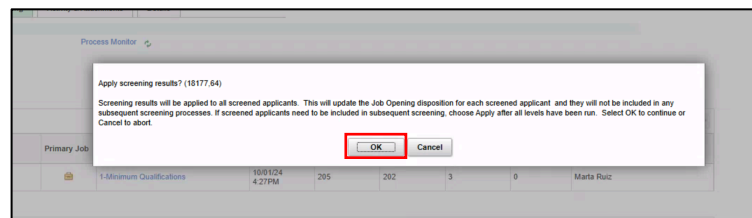
Applicants | Applicant Search | **Applicant Screening** | Activity & Attachments | Details

Screening Levels | Screening Results

Run: Select... Go Process Monitor

**Apply Results**

22. Select the **OK** button.



Process Monitor

Apply screening results? (10177.64)

Screening results will be applied to all screened applicants. This will update the Job Opening disposition for each screened applicant and they will not be included in any subsequent screening processes. If screened applicants need to be included in subsequent screening, choose Apply after all levels have been run. Select OK to continue or Cancel to abort.

Primary Job: Minimum Qualifications 10/9/24 4:27PM 205 202 3 0 Maria Ruiz

**OK** Cancel

**Note:** Once results are applied to the candidate, they are permanent and cannot be undone.

## Lesson 2: Candidate Selection

### Lecture 2: Company Identifier

The Company Identifier will allow Constitutional Office (CO) employees to be distinguished from Miami-Dade County (MDC) employees. It will associate the Company (i.e. Miami-Dade County or Constitutional Office) that each Employee is employed by with an identifier.

On the **Applicants** tab, DPRs will be able to see the **Company Identifier**. Applicants will be identified under both the **Company** and **Business Unit** tab. Employees under the MDC company will be distinguished by their business unit.

Applicants

Applicant Search

Applicant Screening

Activity & Attachments

Details

All (73)

Applied (0)

Reviewed (0)

Screen (0)

Route (0)

Applicants ?

Q

Select	Applicant Name	Applicant ID	Type	Company	Business Unit	Disposition
<input type="checkbox"/>		941447	Employee	CL	CL	Reject
<input type="checkbox"/>		938001	Employee	CL	CL	Reject
<input type="checkbox"/>		942053	External	MDC	PA	Reject
<input type="checkbox"/>		968252	Employee	TC	TC	Reject
<input type="checkbox"/>		901433	Employee	CL	CL	Reject



## Lesson 2: Lesson Summary

### Lesson Summary



Now that the user has completed the lesson, the user should be able to:

- Screen applicants for minimum qualifications and preferences then apply results

## Lesson 3: Employment Offer and Acceptance

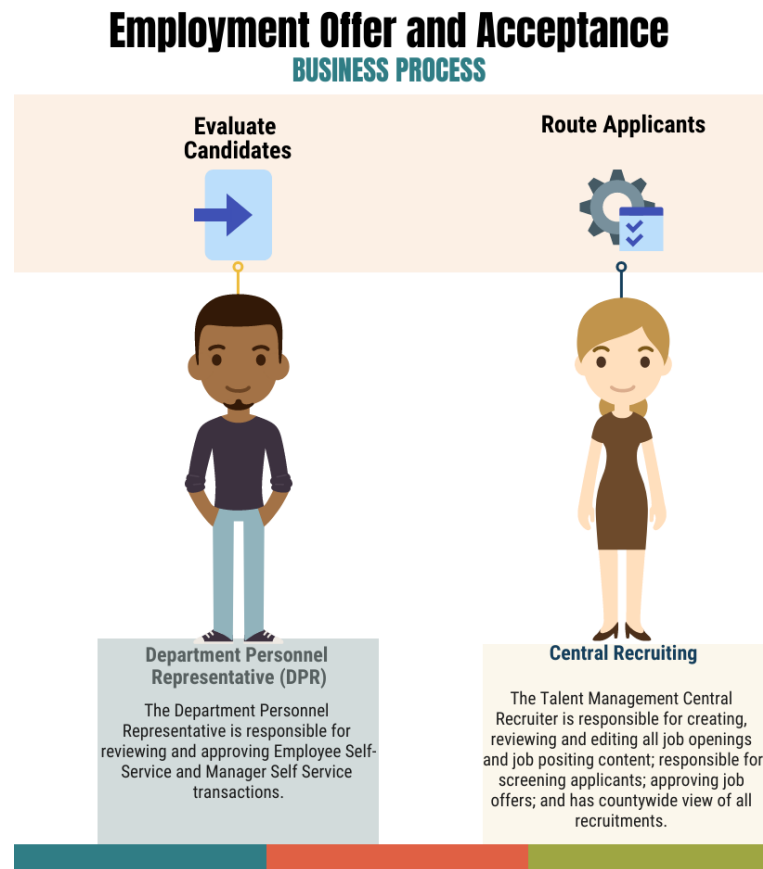
### Lesson 3: Overview

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

- Create a job offer

## Lesson 3: Employment Offer and Acceptance

### Lesson 3: Introduction



This is where an employment record instance is created in INFORMS. The employment record is the central piece to the employee and serves as the foundation to other modules within the system including pay, leave, benefits, and retirement.

Applicant and job information is automatically transferred to the manage hire template to reduce manual entry.

## Lesson 3: Employment Offer and Acceptance

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Base Salary</b>	The amount of money a salaried employee regularly earns before any additions or deductions are applied to their earnings
<b>Candidate Status</b>	The status of the candidate during the pre-employment process. The candidate status identifies the various steps of department specific pre-employment activities.

## Lesson 3: Employment Offer and Acceptance

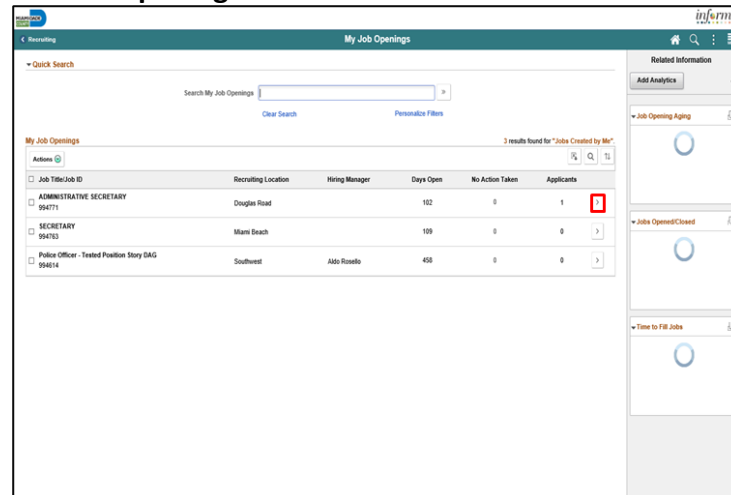
### Lecture 1: Employment Offer

This lesson will review creating a job offer.

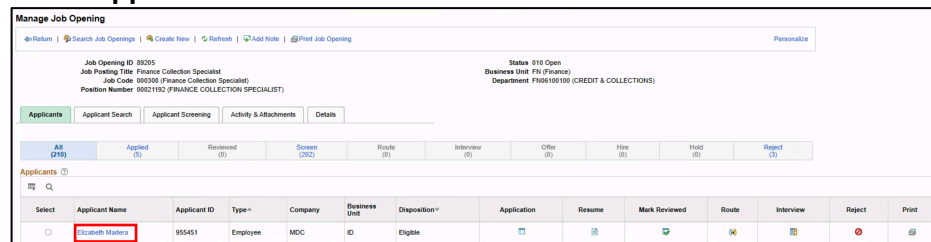
**Note:** To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

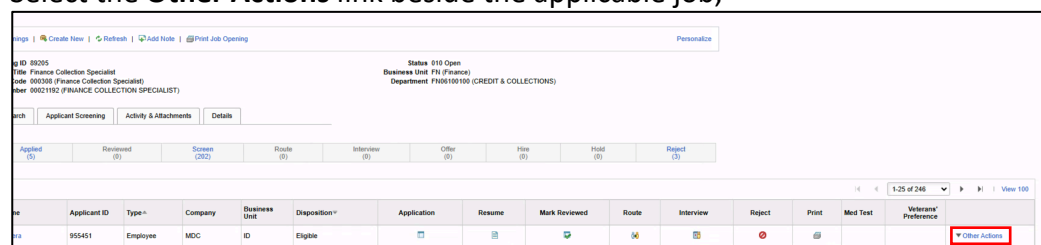
1. Select the **View Job Opening** button.



2. Select the **Applicant's** name.



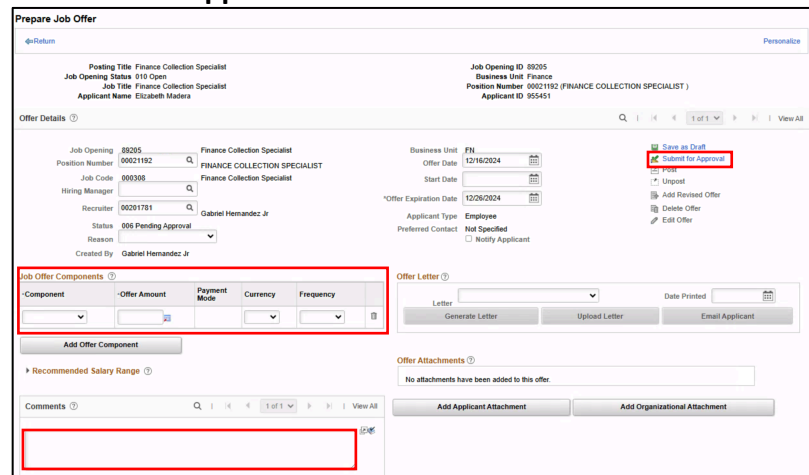
3. Select the **Other Actions** link beside the applicable job,



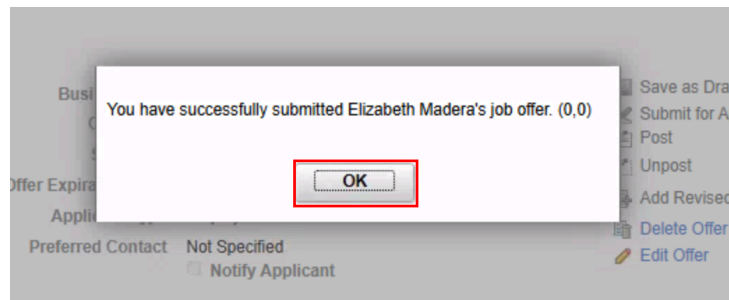
## Lesson 3: Employment Offer and Acceptance

### Lecture 1: Employment Offer

4. Input applicable details in the **Comments** field.
5. Input applicable **Component** details.
6. Select the **Submit for Approval** link.



7. Select the **OK** button.



**Note:** All job offers must be approved by Central Recruitment.

## Lesson 3: Employment Offer and Acceptance

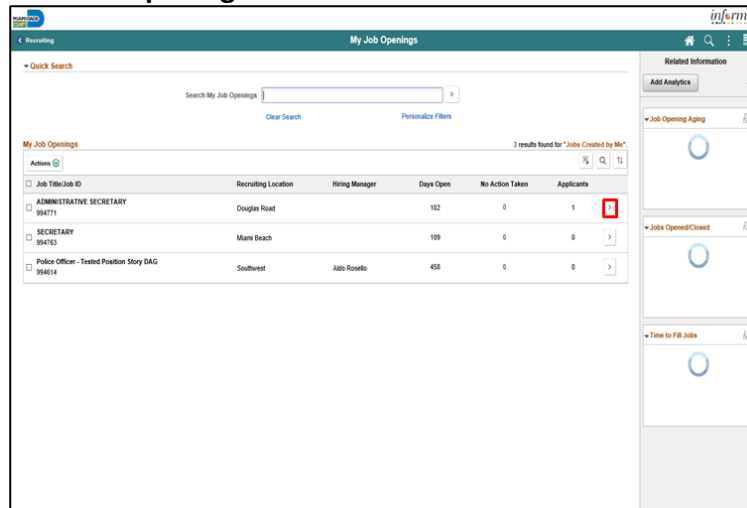
### Lecture 2: Update Candidate Status

Upon acceptance of the job offer, the candidate's status must be changed. Accurate candidate statuses allow for detailed reporting and tracking of the candidate.

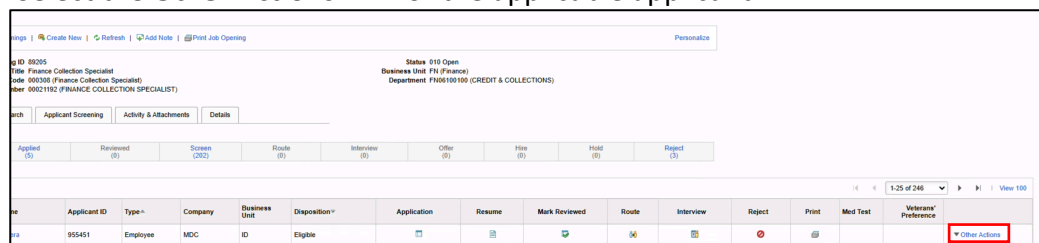
**Note:** To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

1. Select the **View Job Opening** button.



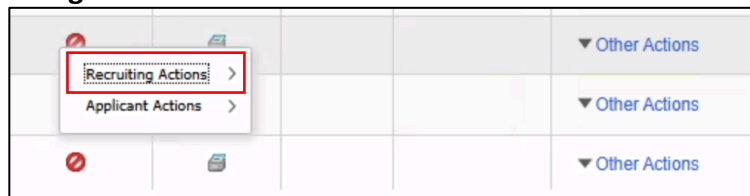
2. Select the **Other Actions** link for the applicable applicant.



## Lesson 3: Employment Offer and Acceptance

### Lecture 2: Update Candidate Status

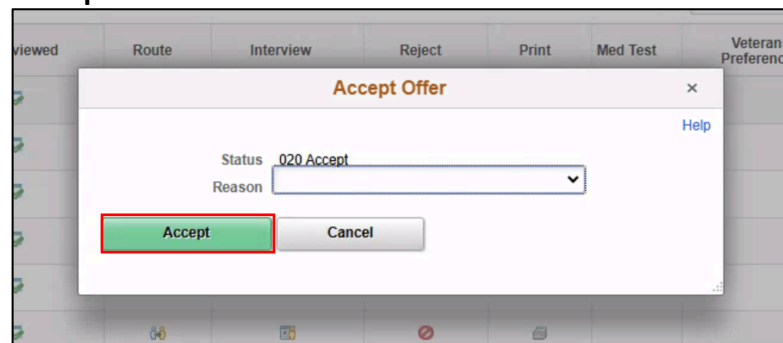
3. Select **Recruiting Actions**.



4. Select the **Accept Offer** link.



5. Select the **Accept** button.





## Lesson 3: Employment Offer and Acceptance

Lecture 2:  
Update  
Candidate  
Status

6. Select the **OK** button.



## Lesson 3: Employment Offer and Acceptance

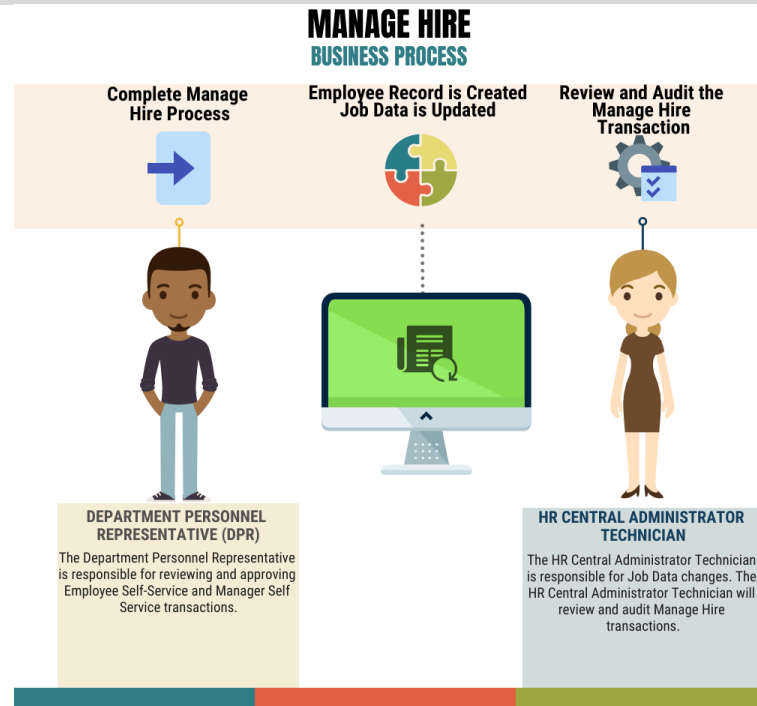
**Lesson Summary** Now that the user has completed the lesson, the user should be able to:



- Create an Employment Offer
- Update Candidate Status

## Lesson 4: Onboarding Activities

### Lesson 4: Introduction



This process is used to generate an Employee ID and manage the employee throughout its lifetime. Any documentation provided during the application process, such as degrees and certifications, is transferred over to the employee profile.

Central Human Resources will review, and audit all manage hire activity daily.

## Lesson 4: Onboarding Activities

### Key Terms



The following key terms are used in this module:

Term	Definition
<b>Employee Profile</b>	The central location of an individual's attributes. The profile tracks employees' skills, competencies, and accomplishments. It can be utilized in career planning, for identifying training needs, for performance management and in the recruitment process for checking minimum job requirements.
<b>Time Reporter Type</b>	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
<b>Time Reporting Template</b>	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template.
<b>Workgroup</b>	Grouping of employees that share common Time and Labor attributes and rules.
<b>Taskgroup</b>	A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for employee's with the same task reporting requirements. Each employee must be associated with one taskgroup.

## Lesson 4: Onboarding Activities

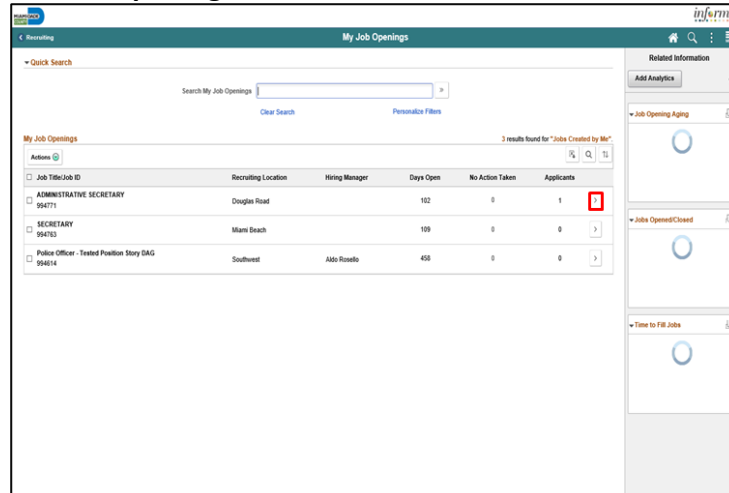
### Lecture 1: Preparing for Hire

This lesson will review preparing for hire.

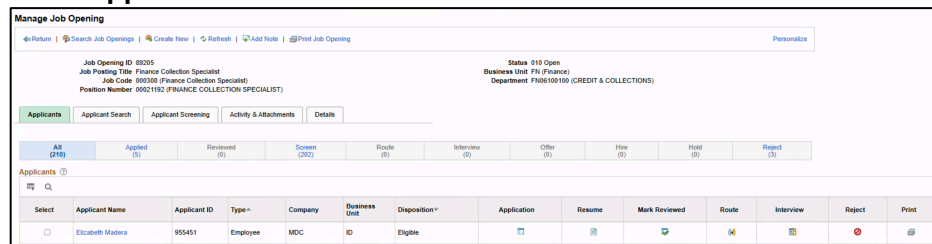
**Note:** To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

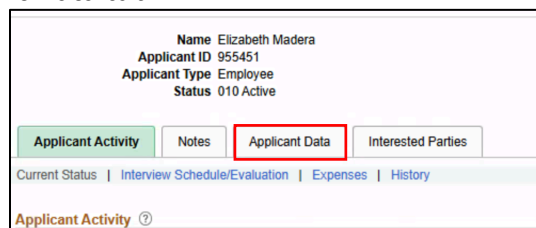
1. Select the **View Job Opening** button.



2. Select the **Applicant's** name.



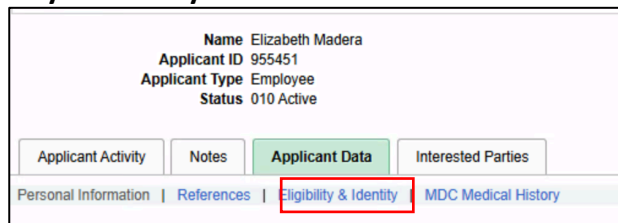
3. Select the **Applicant Data** tab.



## Lesson 4: Onboarding Activities

### Lecture 1: Preparing for Hire

4. Select the **Eligibility & Identity** link.

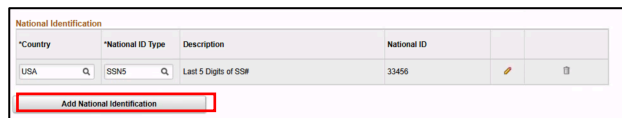


Name Elizabeth Madera  
 Applicant ID 955451  
 Applicant Type Employee  
 Status 010 Active

Applicant Activity | Notes | **Applicant Data** | Interested Parties

Personal Information | References | **Eligibility & Identity** | MDC Medical History

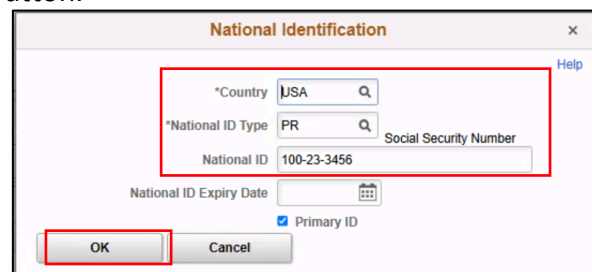
5. Click the **Add National Identification** button.



*Country	*National ID Type	Description	National ID		
USA	SSN5	Last 5 Digits of SS#	33456		

**Add National Identification**

6. Input or search for the **Country**.
7. Input or search for the **National ID Type**.
8. Input the **National ID** for the applicant.
9. Select the **Primary ID** checkbox.
10. Select the **OK** button.



**National Identification** [X] Help

\*Country: USA

\*National ID Type: PR Social Security Number

National ID: 100-23-3456

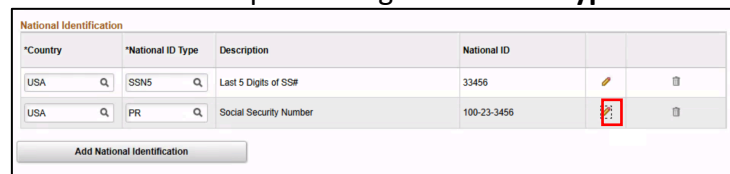
National ID Expiry Date: [Calendar Icon]

☒ Primary ID

**OK** Cancel

**Note:** Confirm only one National Identification entry has been selected as the Primary ID. The applicant may have entered an SSN5 that is automatically flagged and must be removed as the Primary ID.

11. Select the **Edit** button on the preexisting **National ID Type**.




*Country	*National ID Type	Description	National ID		
USA	SSN5	Last 5 Digits of SS#	33456		
USA	PR	Social Security Number	100-23-3456	<b>Edit</b>	

**Add National Identification**

## Lesson 4: Onboarding Activities

### Lecture 1: Preparing for Hire

12. Select the **Primary ID** checkbox.
13. Select the **OK** button.



**National Identification** [X] [Help]

\*Country: USA [Q]

\*National ID Type: PR [Q] Social Security Number

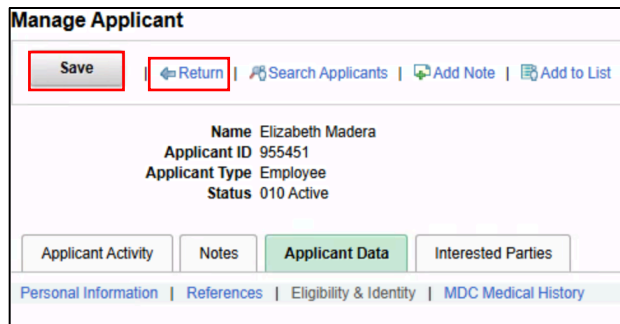
National ID: 100-23-3456

National ID Expiry Date: [Calendar Icon]

☒ Primary ID

[OK] [Cancel]

14. Select the **Save** button.
15. Select the **Return** link.



**Manage Applicant**

[Save] [Return] [Search Applicants] [Add Note] [Add to List]

Name: Elizabeth Madera  
 Applicant ID: 955451  
 Applicant Type: Employee  
 Status: 010 Active

Applicant Activity | Notes | **Applicant Data** | Interested Parties

Personal Information | References | Eligibility & Identity | MDC Medical History

16. Select the **Other Actions** link.



Single | Create New | Refresh | Add Note | Print Job Opening | Personalize

ID: 955451  
 Title: Finance Collection Specialist  
 Code: 000300 (Finance Collection Specialist)  
 User: 0002190 (FINANCE COLLECTION SPECIALIST)

Status: 010 Open  
 Business Unit: FN (Finance)  
 Department: FN00100100 (CREDIT & COLLECTIONS)

Arch | Applicant Screening | Activity & Attachments | Details

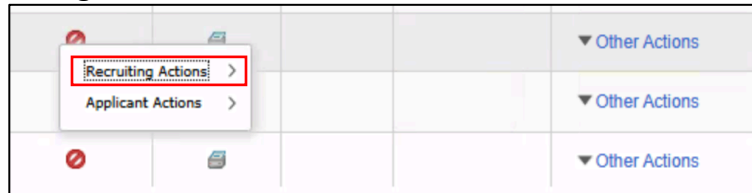
Applied (5) | Reviewed (0) | Screen (202) | Route (0) | Interview (0) | Offer (0) | Hire (0) | Hold (0) | Reject (0)

Applicant ID	Type	Company	Business Unit	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Print	Med Test	Veterans' Preference	Other Actions
955451	Employee	MDC	ID	Eligible	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Other Actions]

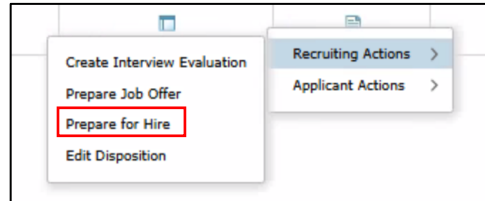
## Lesson 4: Onboarding Activities

### Lecture 1: Preparing for Hire

#### 17. Select **Recruiting Actions**.



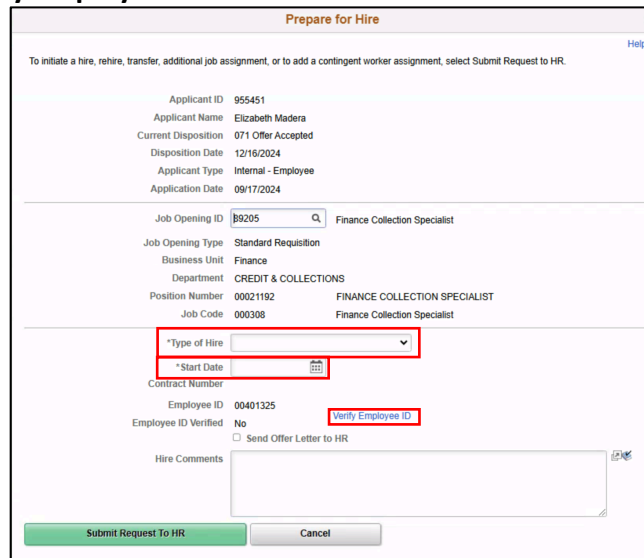
#### 18. Select **Prepare for Hire**.



#### 19. Select the applicable **Type of Hire** from the list.

#### 20. Input the applicable **Start Date**.

#### 21. Select the **Verify Employee ID** link.



**Note:** Confirm the applicant does not exist in the system.



Lesson 4: Onboarding Activities

Lecture 1:  
Preparing for Hire

22. Select the **Return** button.

**Search/Match Results**

	Carry ID				
5	00407586	Viomar	Jacqueline	M.	
6	00407539	Marion	Kelvin	Eugene	
7	00407536	Madraco Figueroa	Manuel	Alejandro	
8	00407383	Marquez	Daniel		
9	00407330	Martinez	Isabella	Marie	
10	00407295	Martino	Anabel		
11	00407294	Rivero Leonesma	Manuel	Alejandro	
12	00407294	Rivero Ledesma	Manuel	Alejandro	
13	00407278	Thomas	Felisha		
14	00407169	Martinez	Youdel		
15	00407086	Mayo-Paz	Evelyn	Yvette	
16	00406950	SCHUMANN	MELISSA Virginia	VIRGINIA	
17	00406732	Masdeu	Isabella	Maria	
18	00406580	Marsa	Michael	L	
19	00406538	Alvarez Amado	Marisel		

**Return**

23. Select the **Submit Request to HR** button.

**Prepare for Hire**

To initiate a hire, rehire, transfer, additional job assignment, or to add a contingent worker assignment, select Submit Request to HR.

Applicant ID 955451  
Applicant Name Elizabeth Madera  
Current Disposition 071 Offer Accepted  
Disposition Date 12/16/2024  
Applicant Type Internal - Employee  
Application Date 09/17/2024

Job Opening ID 89205 Finance Collection Specialist  
Job Opening Type Standard Requisition  
Business Unit Finance  
Department CREDIT & COLLECTIONS  
Position Number 00021192 FINANCE COLLECTION SPECIALIST  
Job Code 000308 Finance Collection Specialist

\*Type of Hire  
\*Start Date  
Contract Number  
Employee ID 00401325  
Employee ID Verified No  
☐ Send Offer Letter to HR

Hire Comments

**Submit Request to HR** Cancel

24. Select the **OK** button.

You have successfully submitted this request. (18175,1019)

**OK**

Applicant ID	Type	Company	Business Unit	Disposition
955451	Employee	MDC	ID	Ready

## Lesson 4: Onboarding Activities

### Lecture 2: Manage Hire

This lesson will review managing new or rehired employee.

Navigate to **NavBar > Navigator > Human Resources (HCM) > Workforce Administration > Personal Information > Manage Hire**

1. Select the **Refresh** button.



**Manage Hires**  
The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

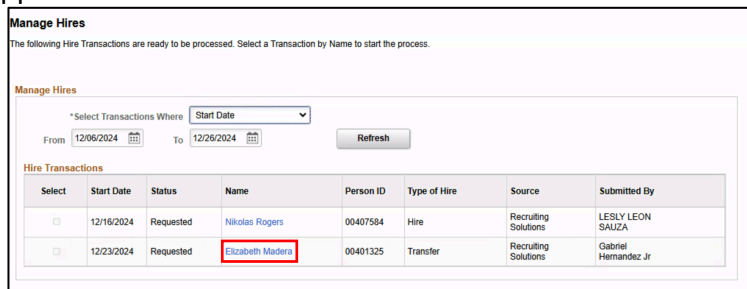
**Manage Hires**

\* Select Transactions Where Start Date

From 12/06/2024 To 12/26/2024 **Refresh**

**Hire Transactions**

2. Select the applicant Name.



**Manage Hires**  
The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.

**Manage Hires**

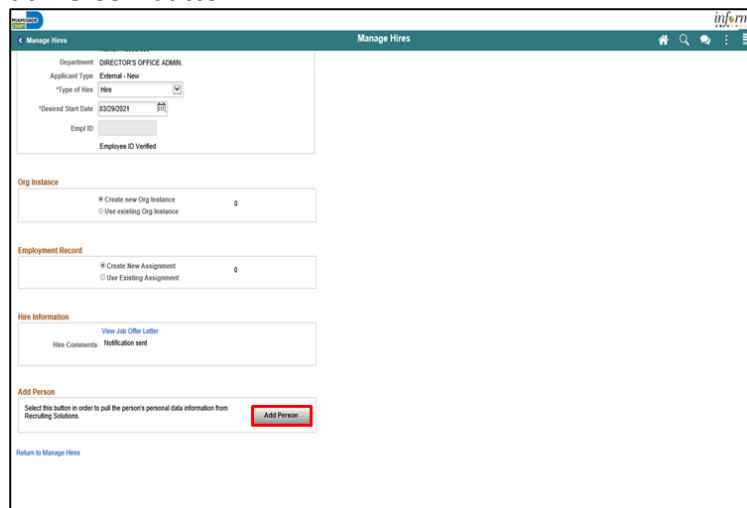
\* Select Transactions Where Start Date

From 12/06/2024 To 12/26/2024 **Refresh**

**Hire Transactions**

Select	Start Date	Status	Name	Person ID	Type of Hire	Source	Submitted By
<input type="checkbox"/>	12/16/2024	Requested	Nikolas Rogers	00407584	Hire	Recruiting Solutions	LESLEY LEON SAUZA
<input type="checkbox"/>	12/23/2024	Requested	Elizabeth Madero	00401325	Transfer	Recruiting Solutions	Gabriel Hernandez Jr

3. Select the **Add Person** button.



**Manage Hires**

Department: DIRECTOR'S OFFICE ADMIN  
Applicant Type: External - New  
\*Type of Hire: Hire  
\*Desired Start Date: 05/29/2021  
Emp ID:   
Employee ID Verified

**Org Instance**  
☐ Create new Org Instance 0  
☐ Use existing Org Instance

**Employment Record**  
☐ Create New Assignment 0  
☐ Use Existing Assignment

**Hire Information**  
[View Job Offer Letter](#)  
 Hire Comments:   
 Notification text:

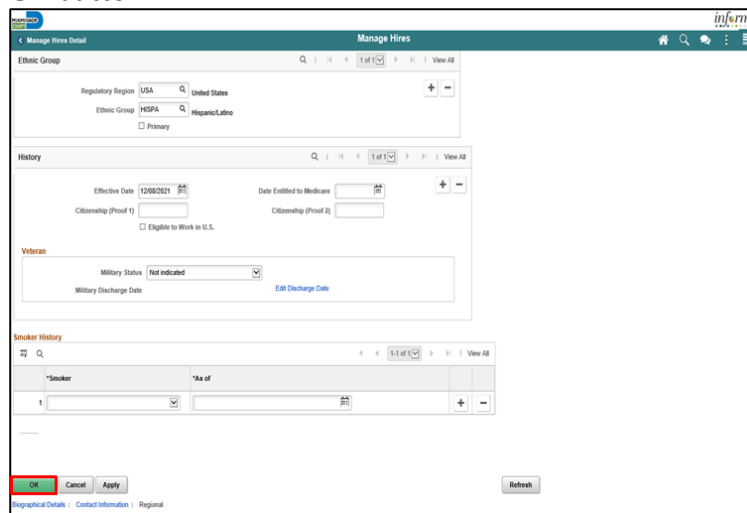
**Add Person**  
 Select this button in order to pull the person's personal data information from Recruiting Solutions. **Add Person**

[Return to Manage Hires](#)

## Lesson 4: Onboarding Activities

### Lecture 2: Manage Hire

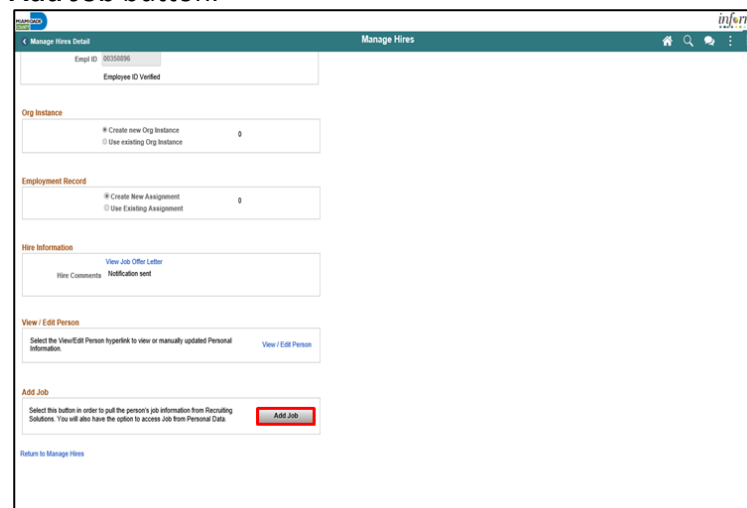
4. Select the **OK** button.



The screenshot shows the 'Manage Hires Detail' form. At the bottom left, there are three buttons: 'OK', 'Cancel', and 'Apply'. The 'OK' button is highlighted with a red rectangular box. Other fields visible include 'Ethnic Group' (USA, Hispanic/Latino), 'Effective Date' (12/08/2021), 'Date Enrolled to Medicare', 'Citizenship (Proof 1)', 'Citizenship (Proof 2)', 'Veteran' status, 'Military Status' (Not indicated), and 'Military Discharge Date'. There is also a 'Smoker History' section.

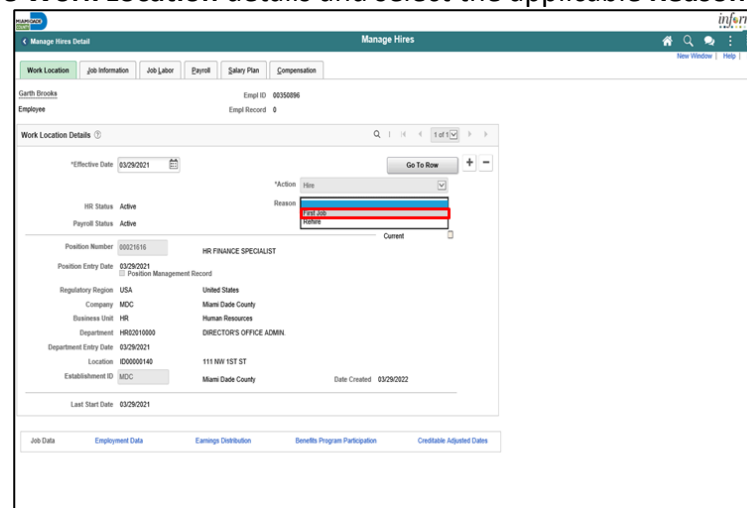
**Note:** After selecting the **OK** button an **Employee ID** is assigned.

5. Select the **Add Job** button.



The screenshot shows the 'Manage Hires Detail' form after the Employee ID has been assigned. The 'Add Job' button is highlighted with a red rectangular box. Other fields visible include 'Emp ID' (00350096), 'Employee ID Verified', 'Org Instance' (0), 'Employment Record' (0), 'Hire Information' (View Job Offer Letter, Hire Comments, Notification sent), 'View / Edit Person' (View / Edit Person), and 'Add Job' (Add Job).

6. Review the **Work Location** details and select the applicable **Reason** for hire.



The screenshot shows the 'Manage Hires Detail' form with the 'Work Location' tab selected. The 'Reason' dropdown menu is open, showing 'Add Job' as the selected option. Other fields visible include 'Effective Date' (03/29/2021), 'HR Status' (Active), 'Payroll Status' (Active), 'Position Number' (0021616), 'HR FINANCE SPECIALIST', 'Position Entry Date' (03/29/2021), 'Regulatory Region' (USA), 'Company' (MDC), 'Business Unit' (HR), 'Department' (HR0201000), 'Director's Office Admin', 'Location' (111 NW 1ST ST), 'Establishment ID' (MDC), 'Miami Dade County', 'Date Created' (03/29/2022), and 'Last Start Date' (03/29/2021).

## Lesson 4: Onboarding Activities

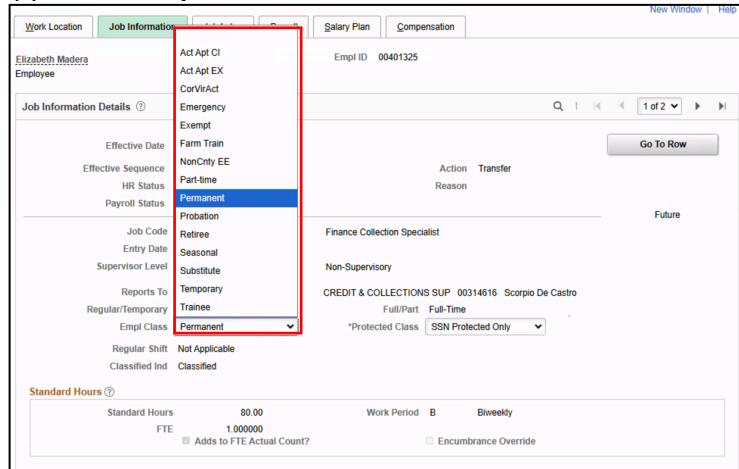
### Lecture 2: Manage Hire

4. Select the **Job Information** tab.



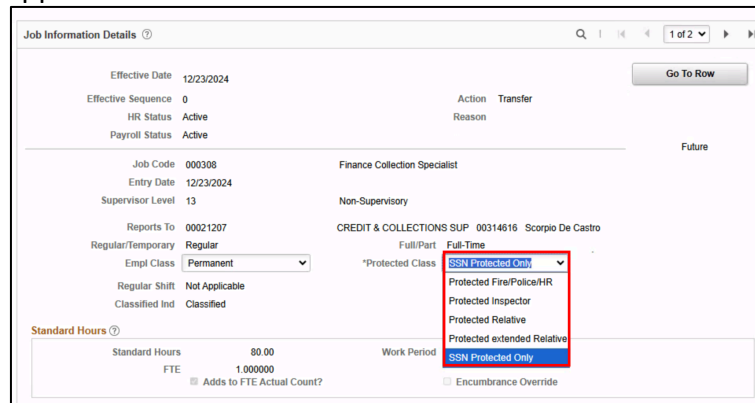
The screenshot shows the 'Manage Hire' interface with the 'Job Information' tab highlighted in red. The employee name 'Elizabeth Madera' and 'Empl ID 00401325' are visible at the top.

5. Select the applicable **Empl Class** from the list.



The screenshot shows the 'Job Information Details' form. The 'Empl Class' dropdown menu is open, showing a list of options including 'Permanent', 'Probation', 'Retiree', 'Seasonal', 'Substitute', 'Temporary', 'Trainee', and 'Not Applicable'. The 'Permanent' option is highlighted in blue.

6. Select the applicable **Protected Class** from the list.

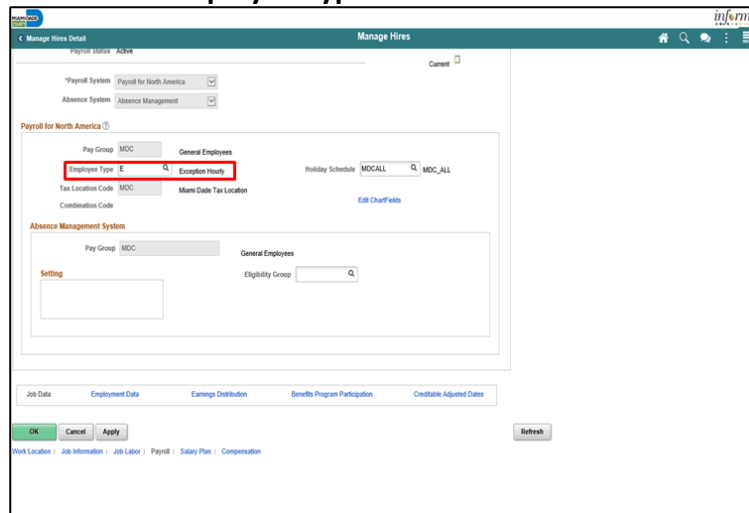


The screenshot shows the 'Job Information Details' form. The 'Protected Class' dropdown menu is open, showing a list of options including 'SSN Protected Only', 'Protected Fire/Police/HR', 'Protected Inspector', 'Protected Relative', 'Protected extended Relative', and 'SSN Protected Only'. The 'SSN Protected Only' option is highlighted in blue.

## Lesson 4: Onboarding Activities

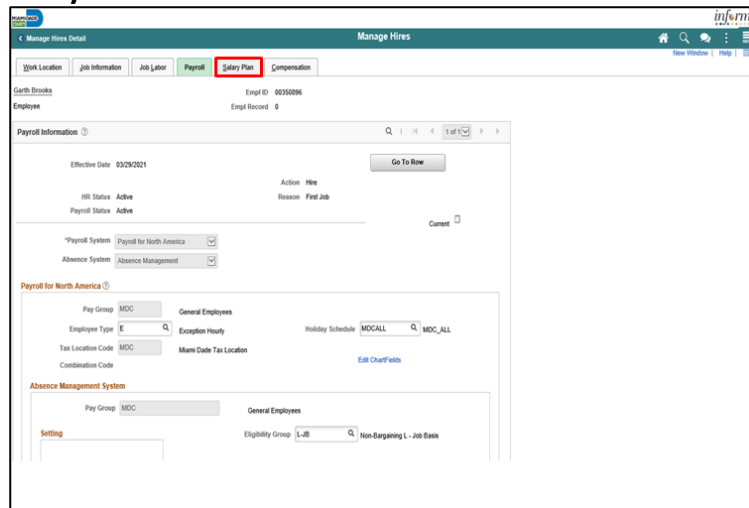
### Lecture 2: Manage Hire

#### 7. Input or search for the **Employee Type**.



The screenshot shows the 'Manage Hire Detail' form for 'Garth Brooks' (Emp ID: 00300096). The 'Payroll' tab is selected. The 'Employee Type' field is highlighted with a red box. The form includes sections for 'Payroll for North America' and 'Absence Management System'. The 'Payroll for North America' section has fields for Pay Group (MDC), General Employees, Employee Type (E), Exception Hourly, Holiday Schedule (MDCALL), MDCALL, MDC\_ALL, Tax Location Code (MDC), Miami Date Tax Location, and Combination Code. The 'Absence Management System' section has fields for Pay Group (MDC), General Employees, and Eligibility Group. The bottom of the form has tabs for Job Data, Employment Data, Earnings Distribution, Benefits Program Participation, and Creditable Adjusted Dates. There are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons at the bottom.

#### 8. Select the **Salary Plan** tab.

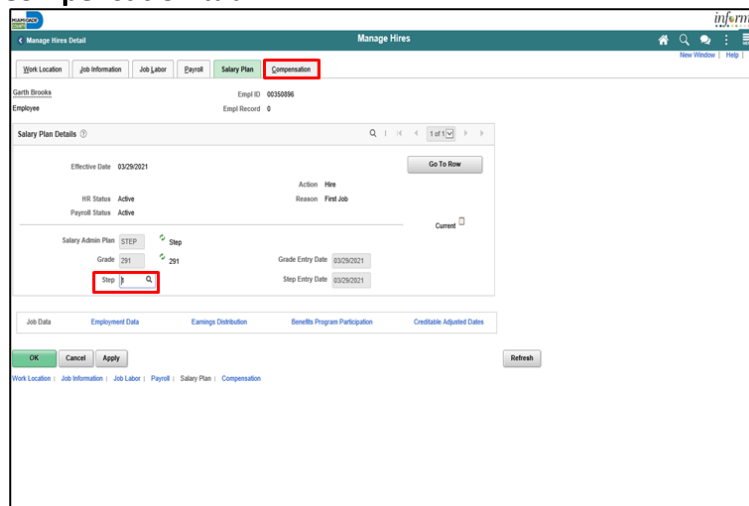


The screenshot shows the 'Manage Hire Detail' form for 'Garth Brooks' (Emp ID: 00300096). The 'Salary Plan' tab is selected and highlighted with a red box. The form includes sections for 'Payroll Information' and 'Payroll for North America'. The 'Payroll Information' section has fields for Effective Date (03/29/2021), Action (Hire), Reason (First Job), and a 'Go To Row' button. The 'Payroll for North America' section has fields for Pay Group (MDC), General Employees, Employee Type (E), Exception Hourly, Holiday Schedule (MDCALL), MDCALL, MDC\_ALL, Tax Location Code (MDC), Miami Date Tax Location, and Combination Code. The 'Absence Management System' section has fields for Pay Group (MDC), General Employees, and Eligibility Group. The bottom of the form has tabs for Job Data, Employment Data, Earnings Distribution, Benefits Program Participation, and Creditable Adjusted Dates. There are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons at the bottom.

#### 9. Input or search the **Step** details, if applicable.

**Note:** If the salary plan is an open grade, the **Step** field will not be applicable.

#### 10. Select the **Compensation** tab.

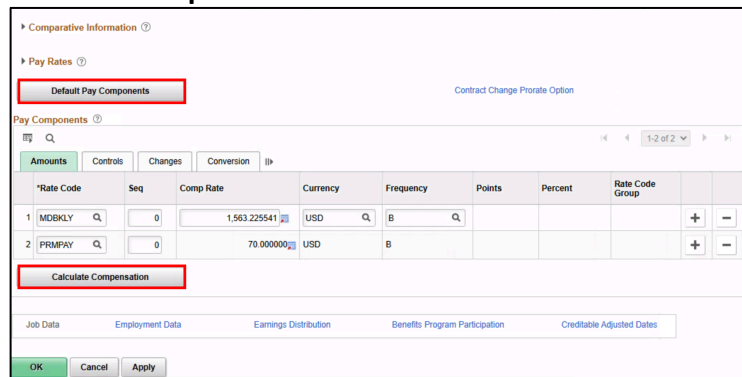


The screenshot shows the 'Manage Hire Detail' form for 'Garth Brooks' (Emp ID: 00300096). The 'Compensation' tab is selected and highlighted with a red box. The form includes sections for 'Salary Plan Details' and 'Salary Admin Plan'. The 'Salary Plan Details' section has fields for Effective Date (03/29/2021), Action (Hire), Reason (First Job), and a 'Go To Row' button. The 'Salary Admin Plan' section has fields for Grade (291), Step (3), Grade Entry Date (03/29/2021), and Step Entry Date (03/29/2021). The 'Step' field is highlighted with a red box. The bottom of the form has tabs for Job Data, Employment Data, Earnings Distribution, Benefits Program Participation, and Creditable Adjusted Dates. There are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons at the bottom.

## Lesson 4: Onboarding Activities

### Lecture 2: Manage Hire

11. Select the **Default Pay Components** button.
12. Review and update the **Pay Components** section, if applicable.
13. Select the **Calculate Compensation** button.



Comparative Information ⓘ

Pay Rates ⓘ

**Default Pay Components** Contract Change Prorate Option

Pay Components ⓘ

Amounts Controls Changes Conversion ⓘ

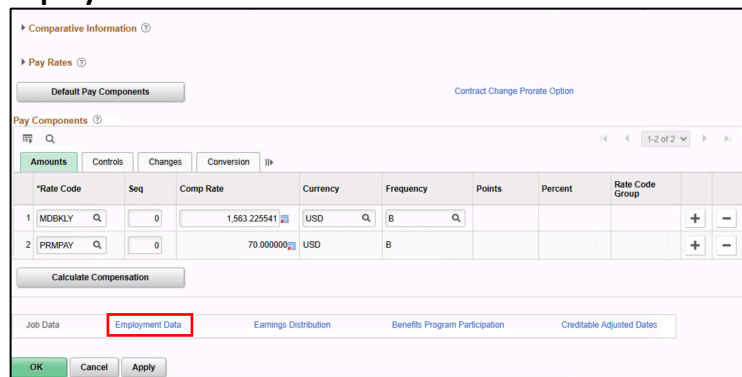
*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY	0	1,563.225541	USD	B				+	-
2 PRMPAY	0	70.000000	USD	B				+	-

**Calculate Compensation**

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

OK Cancel Apply

14. Select the **Employment Data** link.



Comparative Information ⓘ

Pay Rates ⓘ

Default Pay Components Contract Change Prorate Option

Pay Components ⓘ

Amounts Controls Changes Conversion ⓘ

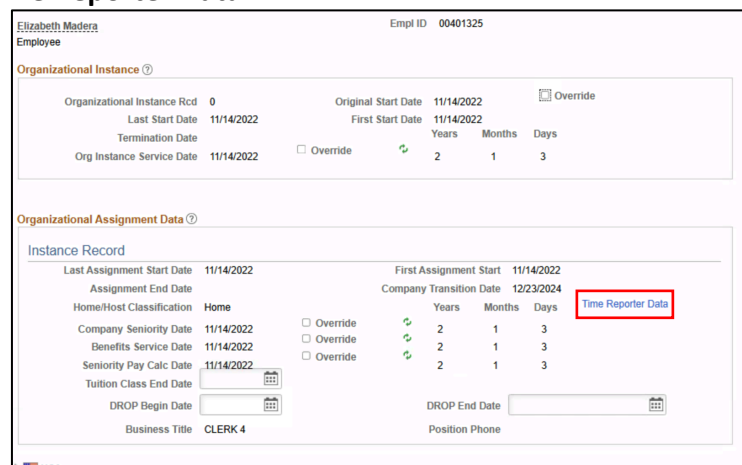
*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY	0	1,563.225541	USD	B				+	-
2 PRMPAY	0	70.000000	USD	B				+	-

Calculate Compensation

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

OK Cancel Apply

15. Click the **Time Reporter Data** link.



Elizabeth Madera  
Employee

Empl ID 00401325

Organizational Instance ⓘ

Organizational Instance Rcd 0 Original Start Date 11/14/2022 Override  
 Last Start Date 11/14/2022 First Start Date 11/14/2022  
 Termination Date  
 Org Instance Service Date 11/14/2022 Override 2 1 3

Organizational Assignment Data ⓘ

Instance Record

Last Assignment Start Date	Assignment End Date	Home/Host Classification	Company Seniority Date	Benefits Service Date	Seniority Pay Calc Date	Tuition Class End Date	DROP Begin Date	DROP End Date	Business Title	Position Phone
11/14/2022		Home	11/14/2022	11/14/2022	11/14/2022				CLERK 4	

First Assignment Start 11/14/2022  
 Company Transition Date 12/23/2024

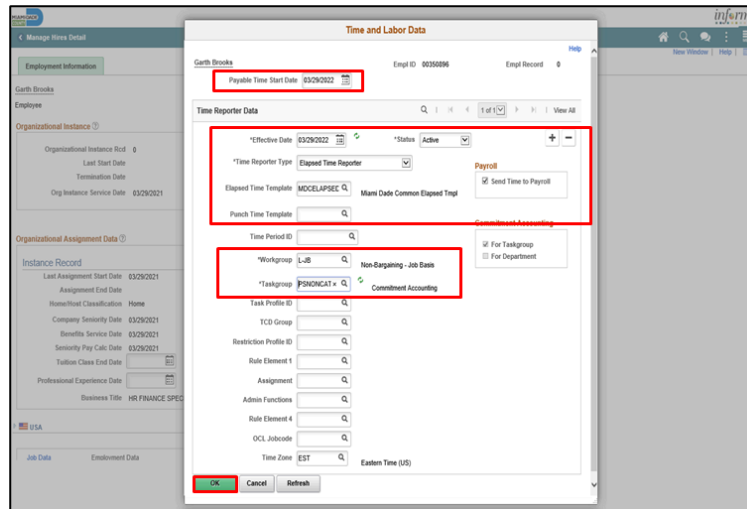
**Time Reporter Data**

USA

## Lesson 4: Onboarding Activities

### Lecture 2: Manage Hire

16. Input or search for the **Payable Time Start Date**.
17. Input or search for the **Effective Date**.
- Note:** The effective date must equal the date of hire.
18. Select the applicable **Time Reporter Type**.
19. Input or search for the **Elapsed Time Template**.
20. Input or search for the **Punch Time Template**, if applicable.
21. Input or search for the **Workgroup**.
22. Input or search for the **Taskgroup**.
23. Select the **OK** button.



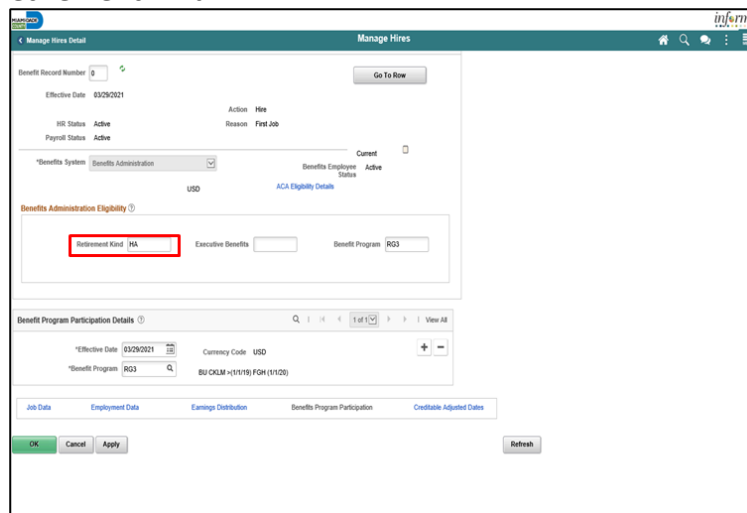
24. Select the **Benefits Program Participation** link.



## Lesson 4: Onboarding Activities

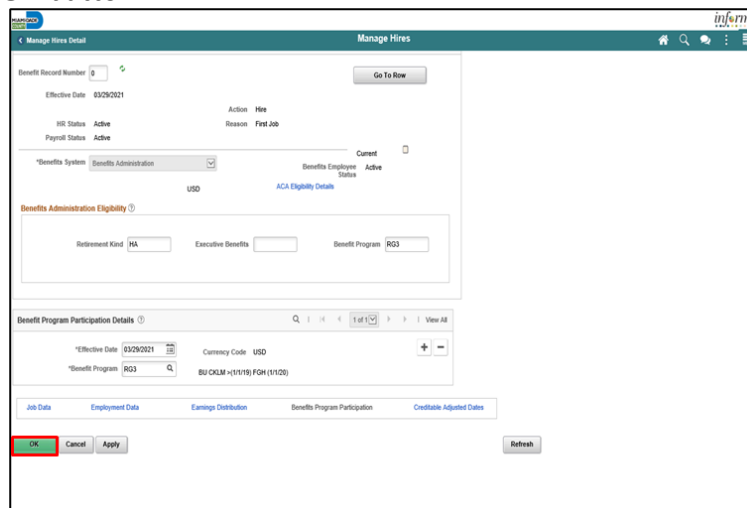
### Lecture 2: Manage Hire

#### 25. Input the Retirement Kind.



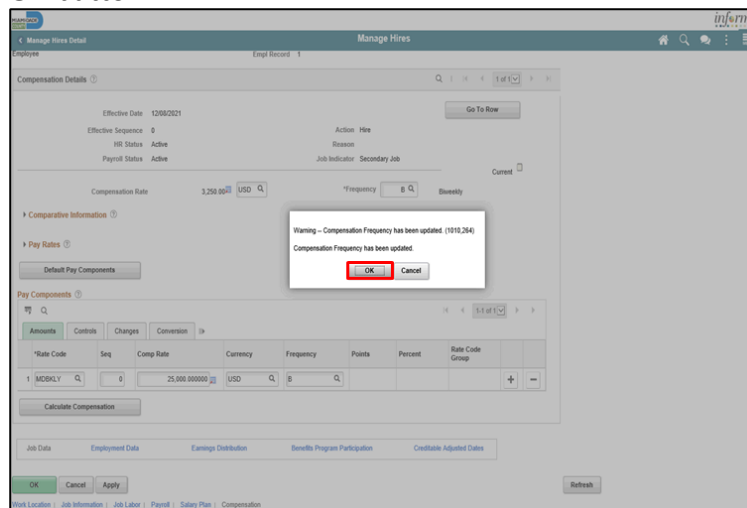
The screenshot shows the 'Manage Hires Detail' form. The 'Retirement Kind' field is highlighted with a red box and contains the value 'NA'. Other fields include 'Effective Date' (03/29/2021), 'HR Status' (Active), 'Payroll Status' (Active), 'Benefits System' (Benefits Administration), 'Currency' (USD), and 'Benefit Program' (RG3). The 'Benefits Administration Eligibility' section is also visible.

#### 26. Select the OK button.



The screenshot shows the 'Manage Hires Detail' form. The 'OK' button is highlighted with a red box. The form contains the same data as the previous screenshot, including 'Retirement Kind' (NA) and 'Benefit Program' (RG3).

#### 20. Select the OK button.



The screenshot shows the 'Manage Hires Detail' form with a warning dialog box displayed. The dialog box contains the text: 'Warning - Compensation Frequency has been updated. (1910,354) Compensation Frequency has been updated.' The 'OK' button in the dialog box is highlighted with a red box. The background form shows 'Compensation Details' with 'Effective Date' (12/08/2021), 'Compensation Rate' (3,290.00), and 'Frequency' (B).



## Lesson 4: Onboarding Activities

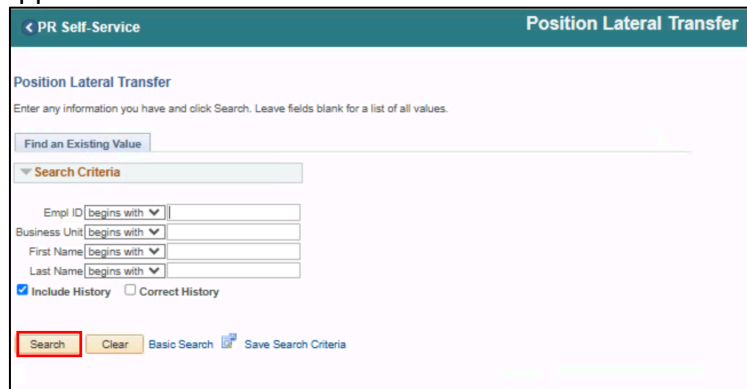
### Lecture 3: Transfer an Employee to a New Position (Lateral)

Transfer Employee to a different Position Number (Lateral) – will allow a transfer of the employee within the same Department and Job Code to a different Position Number.

**Note:** This action is best used when transferring an employee from one branch location to another or to different time shifts.

Navigate to **Human Resources (HCM) > DPR Self-Service > Employee Position Lateral XFER**

1. Input any applicable Search criteria and select the **Search** button.



**PR Self-Service** **Position Lateral Transfer**

**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

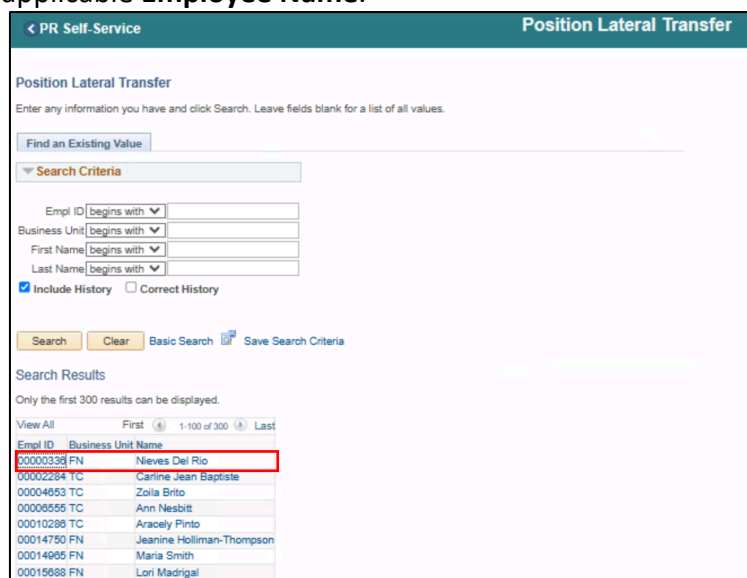
First Name begins with

Last Name begins with

☒ Include History ☐ Correct History

**Search** Clear Basic Search Save Search Criteria

2. Select the applicable **Employee Name**.



**PR Self-Service** **Position Lateral Transfer**

**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

**Search Results**

Only the first 300 results can be displayed.

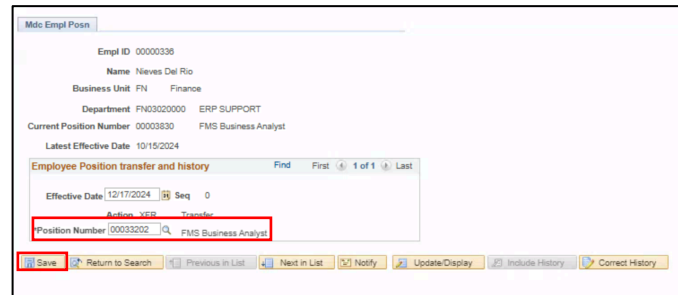
View All First 1-100 of 300 Last

Empl ID	Business Unit Name
0000338 FN	Nieves Del Rio
00002284 TC	Carline Jean Baptiste
00004653 TC	Zolia Brito
00008555 TC	Ann Nesbitt
00010286 TC	Aracely Pinto
00014750 FN	Jeanine Holliman-Thompson
00014905 FN	Maria Smith
00015688 FN	Lori Madrigal

## Lesson 4: Onboarding Activities

### Lecture 3: Transfer an Employee to a New Position (Lateral)

3. Input or search for the **Position Number** the employee is transferring to.
4. Select the **Save** button.



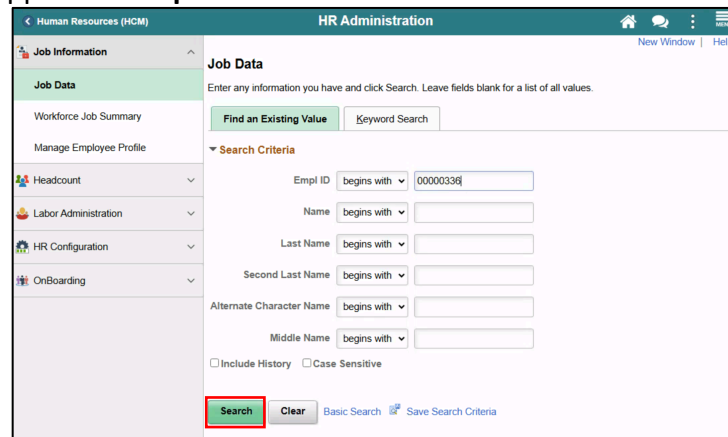
The screenshot displays the 'Mdo Empl Posn' form. At the top, it shows employee details: Empl ID 00000336, Name Nieves Del Rio, Business Unit FN Finance, Department FN03020000 ERP SUPPORT, Current Position Number 00003830 FMS Business Analyst, and Latest Effective Date 10/15/2024. Below this is a section titled 'Employee Position transfer and history' with a 'Find' button and pagination 'First 1 of 1 Last'. It includes an 'Effective Date' field set to 12/17/2024 and a 'Seq' field set to 0. A red box highlights the 'Position Number' field, which contains '00033202' and 'FMS Business Analyst'. Another red box highlights the 'Save' button at the bottom left of the form. Other buttons at the bottom include 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

## Lesson 4: Onboarding Activities

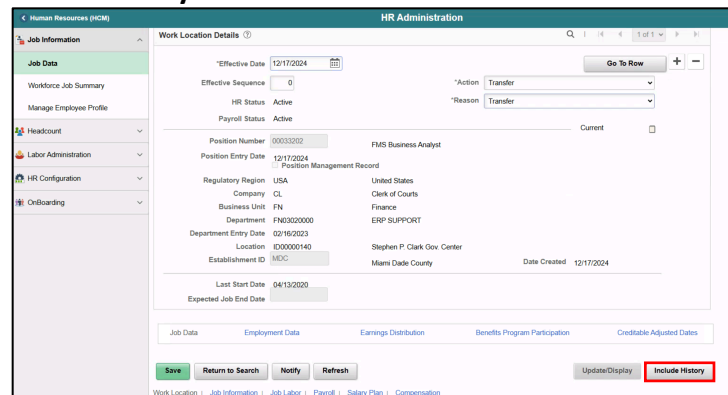
### Lecture 4: Verify the Employee Transfer

Navigate to **Human Resources (HCM) > HR Administration**

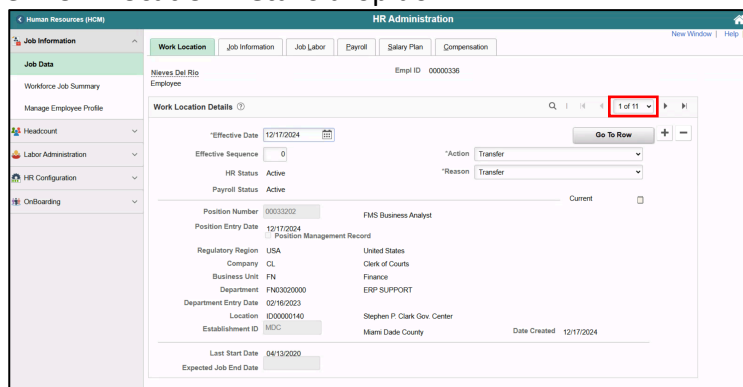
1. Input the applicable search criteria and select the **Search** button.
2. Select the applicable **Empl ID**.



3. Select the **Include History** button.



**Note:** An employee can have multiple history entries. They can be viewed by selecting the page on the **Work Location Details** drop down.



## Lesson 4: Onboarding Activities

### Lesson Summary



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

- Manage a hire

## Module 3: Summary

### Objectives Achieved



Congratulations! The user have completed the Recruitment course. The user now should be able to:

- Create a Job Opening
- Screen Applicants for Minimum Qualifications and Preferences and Apply Points
- Employment Offer and Acceptance
- Prepare for Hire
- Manage Hire
- Transfer an Employee

### Next Steps

Now that the course has been completed, please make sure to complete the following tasks:

- Course assessment (tests the user knowledge of the content)
- Course evaluation (collects course feedback)
- Log off the user workstation

## Module 3: Summary

### Additional Training and Job Aids

Other training materials, related to this topic, include:

- N/A

You also have the following resources available to you:

#### **Job Aids**

- Create a Job Opening
- Create a Job Opening with a Subcategory
- Manage Hire

For additional information, be sure to visit:

- [Miamiidade.gov/informs](https://miamidade.gov/informs)

## Glossary

### Key Terms



The following key terms are used in this course:

Term	Definition
<b>Recruiting Location</b>	The location in which the job will be performed. When jobs are posted, the recruiting location is visible to applicants.
<b>Job Profile</b>	The set of competencies and responsibilities that apply to workers in the same job, position, or salary grade.
<b>Recruitment Contact</b>	The HR Central Recruitment contact for the open job.
<b>Recruitment Area</b>	The location in which the interview will take place.
<b>Recruiter</b>	The department's representative and contact for the open job.
<b>Relative Open Date</b>	The date in which a job will be visible to applicants in relation to the approval date. The system calculates the posting date and displays it in the <b>Post Date</b> field, which becomes unavailable for entry.
<b>Veteran's Preference Points</b>	Veteran' Preference Points are awarded based on the documentation provided by the candidate to HR Central Recruitment.
<b>Base Salary</b>	The amount of money a salaried employee regularly earns before any additions or deductions are applied to their earnings
<b>Candidate Status</b>	The status of the candidate during the pre-employment process. The candidate status identifies the various steps of department specific pre-employment activities.
<b>Employee Profile</b>	The central location of an individual's attributes. The profile tracks employees' skills, competencies, and accomplishments. It can be utilized in career planning, for identifying training needs, for performance management and in the recruitment process for checking minimum job requirements.
<b>Time Reporter Type</b>	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
<b>Time Reporting Template</b>	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template.
<b>Workgroup</b>	Grouping of employees that share common Time and Labor attributes and rules.

## Glossary

### Key Terms



The following key terms are used in this course:

Term	Definition
<b>Company</b>	A distinct legal or financial entity, such as Miami-Dade County or a Constitutional Office, that operates with its own accounting and financial reporting structure, allowing for separate tracking of revenues, expenses, and budgets.
<b>Company Identifier</b>	An identifier associated with each Employee that determines which Company (i.e. Miami Dade County or a Constitutional Office) that they are employed by. This company identifier will allow Constitutional Office employees to be distinguished from Miami Dade County employees.
<b>Taskgroup</b>	A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for employee's with the same task reporting requirements. Each employee must be associated with one taskgroup.