

ePerformance Management Supervisory

People and Internal Operations
Department

eMDC Human Resources...Matters



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The graphic features a cluster of colorful social media icons on the left, including 'Share Photo', 'Twee Like', and 'Must Friend TWEWS'. The text is presented in a clean, sans-serif font on a dark grey background.

Learning Objectives

- Request Nominations
- Prepare an evaluation as a Manager
- Review an employee evaluation as a Manager's Supervisor
- Share the Evaluation with your Employee as a Manager

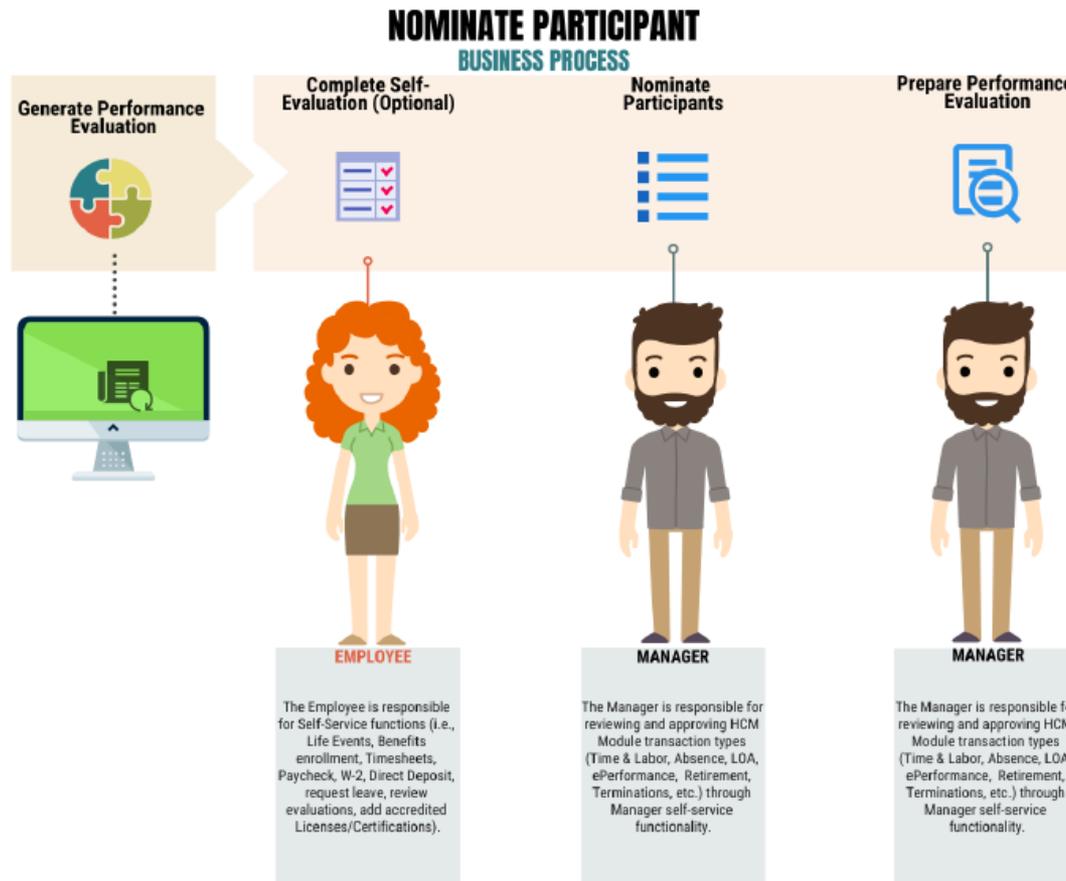
Lesson 1: Preparing an Employee's Evaluation as a Manager

Key Terms

Term	Definition
Individual Rating	The score that a Manager uses to rate Employees in a particular performance evaluation Category.
Merit Increase	A salary increase that Employees may be eligible for if their Overall Rating is "Satisfactory" (or above) and no Individual rating is "Need Improvement" (or lower).
Overall Rating	The average of the Individual Ratings on an Employee's performance evaluation.
Performance Evaluation	A annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for Merit Increases.
Self-Evaluation	A self-rating performed by Employees prior to their Performance Evaluation.
Document Status	The current state of the Evaluation - Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started, or Review Held.
Document Type	Document Review Type is the type of formatted Performance Evaluation document being generated in INFORMS. Document Review Type varies based upon which Employee will be reviewed. "MDC-Annual Review EE" is one example of an INFORMS Document Review Type.

Lesson 1: Requesting Nominations

- Managers can invite a nominee who will provide additional feedback on an employee's evaluation



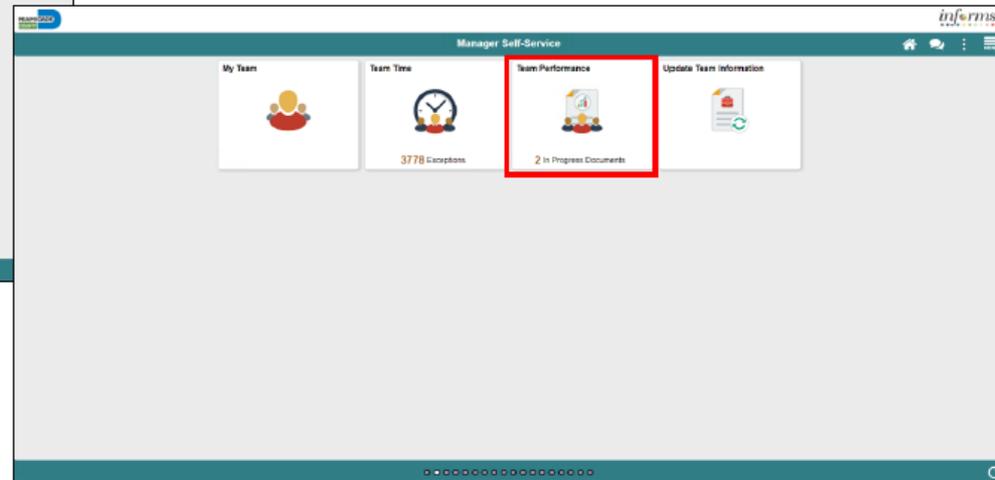
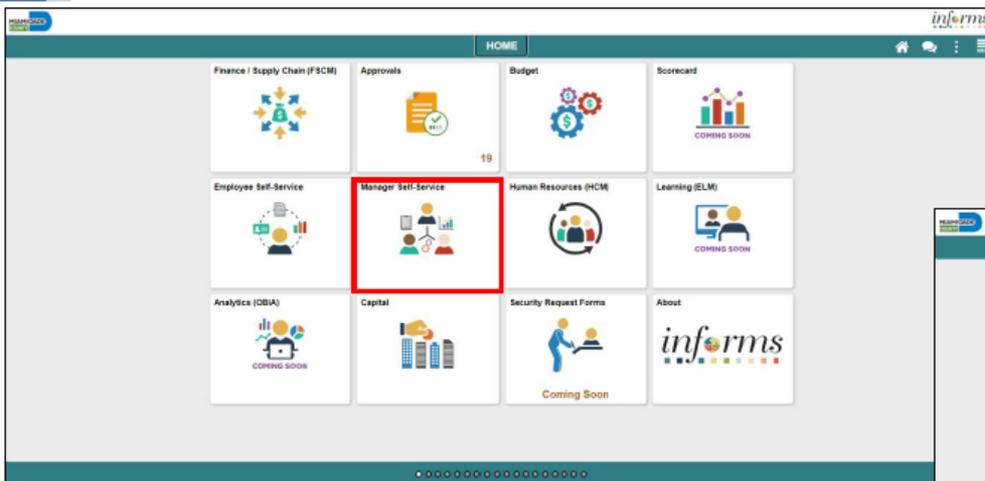
Lesson 1: Reasons to Invite a Nominee

- **Historical Context:**
 - Nominating a former supervisor, even if they have left, can offer valuable historical context regarding the employee's performance trends, achievements, and areas for improvement over time.
- **Succession Planning:**
 - If the evaluation is part of succession planning, nominating someone who can assess the employee's readiness for additional responsibilities or a higher role is crucial.
- **Cross-Departmental Collaboration:**
 - If the employee's work involves interactions with multiple divisions, nominating someone from another division can provide insights into their cross-functional collaboration and impact.

The key is to select nominees based on the specific aspects of the employee's performance that require evaluation, ensuring a comprehensive and well-informed assessment.

Lesson 1: Requesting Nominations Navigation

Navigate to **Manager Self-Service > Team Performance**



Lesson 1: Requesting Nominations

1. Select the Employee Name under Current Documents

The screenshot displays the 'Team Performance' interface. On the left, a navigation menu includes 'Current Documents', 'Historical Documents', and 'Administrative Tasks'. The 'Current Documents' menu item is highlighted with a red box. The main content area shows a table with three rows of data. The first row, for Michelle Lazo, is highlighted with a yellow background and a red box around her name and job title. The table columns are: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. A 'Create Documents' button is visible in the top right of the table area. On the right side, there is a 'Related Information' panel with an 'Add Analytics' button and a 'Performance Status' section containing a circular progress indicator.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 Michelle Lazo Human Resources Manager	MDC-Prof/Supervisory Review ME	Evaluation in Progress	02/08/2021 02/06/2022	01/23/2022
 Tressie Williams Administrative Officer 3	MDC-Prof/Supervisory Review ME	Evaluation in Progress	09/07/2020 09/05/2021	08/22/2021
 Nectar Ortiz Senior Personnel Specialist	MDC-Prof/Supervisory Review ME	Evaluation in Progress	11/04/2019 11/01/2020	10/18/2020

2. Select the **Nominate Participants** hyperlink.

3. Select the **Add Nominees** hyperlink.

Performance Process

MDC-Prof/Supervisory Review ME

Manager Evaluation - Update and Submit

Michelle Lazo

Nominate Participants
Due Date: 02/09/2022

Review Participant Evaluations
Due Date: 01/03/2022

Review Self Evaluation
Due Date: 01/23/2022

Complete Manager Evaluation
Due Date: 01/03/2022

Update and Submit

Pending Approval

Share with Employee

Job Title: Human Resources Manager
Document Type: MDC-Prof/Supervisory Review ME
Template: Employee Performance Eval
Status: Evaluation in Progress

Manager: Dena Kelly
Period: 02/08/2021 - 02/08/2022
Document ID: 52353
Due Date: 01/30/2022

Employee Data

Employee ID: 00035495
Department: PD03110100 PERSONNEL MANAGEMENT - SUPPORT

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Expand All | Collapse All | Calculate All Ratings | Cancel Evaluation

Section 1 - PERFORMANCE OBJECTIVES

Expand | Collapse

ACHIEVEMENT OF OBJECTIVES

Description: Include productivity of the unit (the quantity and quality of output) and accomplishing unit goals.

Manager Rating: [Dropdown]

Manager Comments: [Rich Text Editor]

Created By: Template 12/27/2021 7:29AM

4. Select the **Add Participants** hyperlink

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Manager Self-Service Performance Process

Performance Process Save

Steps and Tasks

Michelle Lazo
MDC-Prof/Supervisory Review ME
02/08/2021 - 02/06/2022

Nominate Participants - Add Nominees Notify

Michelle Lazo
Actions

Job Title	Human Resources Manager	Manager	Dena Kelly
Document Type	MDC-Prof/Supervisory Review ME	Period	02/08/2021 - 02/06/2022
Template	Employee Performance Eval	Document ID	52353
Status	In Progress	Due Date	02/06/2022

Participant Role: Participant Minimum Required: 0 Maximum Available: 2

Nominations
Currently there are no nominees in your nomination list.

+ **Add Participant**

Review Participant Evaluations
Due Date 01/30/2022

Review Self Evaluation
Due Date 01/23/2022

5. Input the search criteria for the person who you're nominating

The screenshot displays the 'informs' Performance Process interface. The main header shows 'Performance Process' and 'MDC-Prof/Supervisory Review ME'. The left sidebar lists 'Steps and Tasks' including 'Nominate Participants', 'Review Participant Evaluations', and 'Complete Manager Evaluation'. The main content area is titled 'Nominate Participants - Add Nominees' and shows a user profile for Michelle Lazo. A 'Person Search' modal window is open, featuring a search form with the following fields: 'Name' (containing 'xavier'), 'Last Name', 'Second Last Name', 'First Name', and 'ACName'. A red box highlights the 'Search' button at the bottom of the modal. A 'Return to Previous Page' link is visible below the search form.

6. Select the checkbox beside the applicable search result.
7. Select the nominee and then the **OK** button.

The screenshot shows a web application interface for 'Manager Self-Service'. A 'Person Search' dialog box is open, displaying a list of search results. The dialog has a title bar with 'Person Search' and a close button. Below the title bar, there is a 'Search Results' section with a table of results. The first row is selected, with a checked checkbox and an information icon. The 'OK' button at the bottom of the dialog is highlighted with a red box. Below the 'OK' button is a link that says 'Return to Previous Page'.

Search Results
<input checked="" type="checkbox"/> Xavier Alvarez
<input type="checkbox"/> Xavier Bercy
<input type="checkbox"/> Xavier Boone
<input type="checkbox"/> Xavier Borbolla
<input type="checkbox"/> Xavier Bussiere
<input type="checkbox"/> Xavier Caraballo
<input type="checkbox"/> Xavier Dixon
<input type="checkbox"/> Xavier Giraldo
<input type="checkbox"/> Xavier Guerra
<input type="checkbox"/> Xavier Hopkins
<input type="checkbox"/> Xavier Jackson
<input type="checkbox"/> Xavier Lightbourn
<input type="checkbox"/> Xavier McIntyre
<input type="checkbox"/> Xavier Cindaro
<input type="checkbox"/> Xavier Peresrego

8. Select the Submit Nominations button.

The screenshot displays the 'Performance Process' interface. The top navigation bar includes 'Manager Self-Service' and 'Performance Process'. The main content area is titled 'MDC-Prof/Supervisory Review ME' and 'Nominate Participants - Add Nominees'. A sidebar on the left lists various tasks with due dates, including 'Nominate Participants' (due 02/06/2022), 'Review Participant Evaluations' (due 01/30/2022), 'Review Self Evaluation' (due 01/23/2022), and 'Complete Manager Evaluation' (due 01/30/2022). The main area shows a profile for Michelle Lazo, a Human Resources Manager, with a due date of 02/06/2022. A table of nominations is shown with one entry for Xavier Alvarez. A 'Submit Nominations' button is highlighted in red in the top right corner.

Performance Process

Steps and Tasks

Michelle Lazo
MDC-Prof/Supervisory Review ME
02/08/2021 - 02/06/2022

Nominate Participants
Due Date 02/06/2022

Add Nominees

Track Nominations

Review Participant Evaluations
Due Date 01/30/2022

Review Self Evaluation
Due Date 01/23/2022

Complete Manager Evaluation
Due Date 01/30/2022

Update and Submit

MDC-Prof/Supervisory Review ME

Nominate Participants - Add Nominees

Michelle Lazo
Actions+

Job Title: Human Resources Manager
Manager: Dena Kelly
Document Type: MDC-Prof/Supervisory Review ME
Period: 02/08/2021 - 02/06/2022
Template: Employee Performance Eval
Document ID: 52353
Status: In Progress
Due Date: 02/06/2022

You have selected nominations for addition. The nominations will be added when the transaction is saved.

Participant Role: Participant
Minimum Required: 0 Maximum Available: 3

Nominations

Nominee	Delete
Xavier Alvarez	

+ Add Participant

Save

Submit Nominations

9. Select the Confirm button

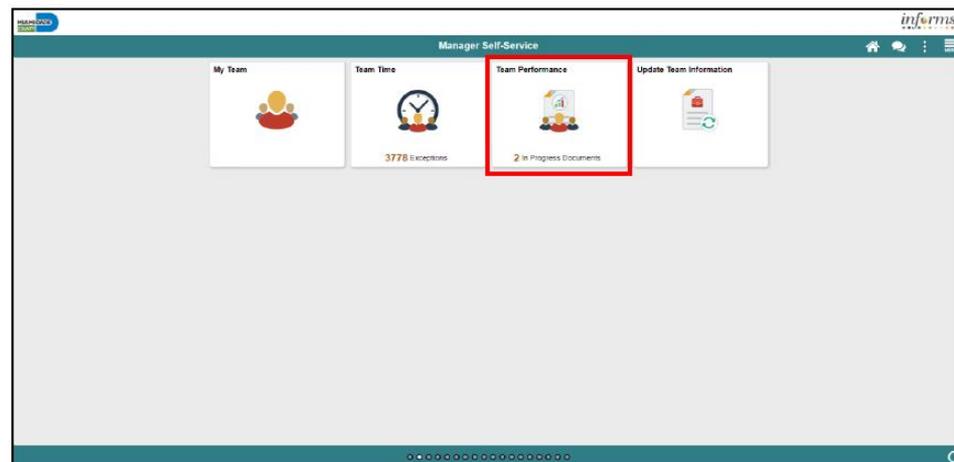
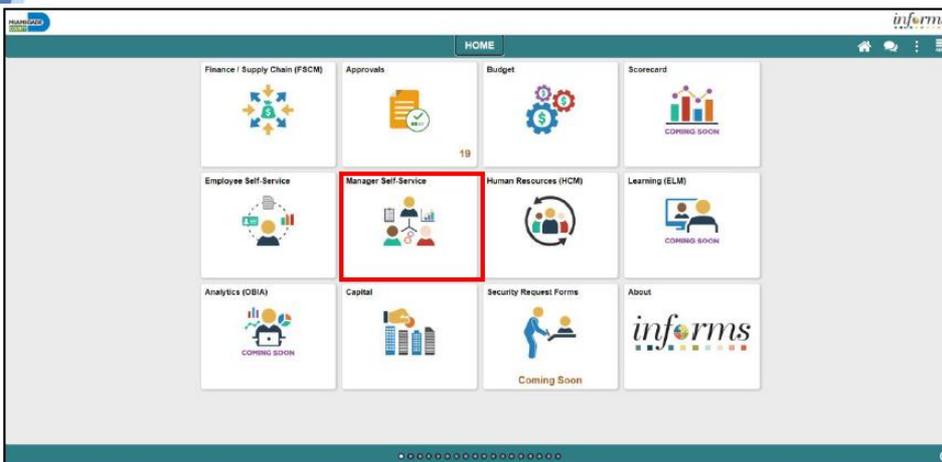
Lesson 2: Preparing an Employee's Evaluation as a Manager

Managers must complete an annual performance evaluation for their employees in Miami-Dade County. Managers must rate their employees on four or seven objectives. An Overall Rating is generated by INFORMS and is based on an average of the individual ratings. The rating model for both the individual objectives and the overall objective is the same:

1. Unsatisfactory
 2. Needs Improvement
 3. Satisfactory
 4. Above Satisfactory
 5. Outstanding
- X. Does not apply

Lesson 2: Preparing an Employee's Evaluation as a Manager

Navigate to **Manager Self-Service > Team Performance**



Lesson 2: Preparing an Employee's Evaluation as a Manager

1. Select the **Employee Name** under **Current Documents**.

The screenshot shows the 'Manager Self-Service' interface for 'Team Performance'. On the left, there is a navigation menu with 'Current Documents', 'Historical Documents', and 'Administrative Tasks'. The main area displays a table titled 'Current Documents' with a 'Create Documents' button. The table has columns for Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. Two rows are visible: one for Dixie Enriquez (Ch, Hr Comp & Job Analysis) with status 'Approval - Submitted', and one for Emanuel Sumrall (Senior Executive Secretary) with status 'Evaluation in Progress'. The first row is highlighted with a red box. On the right, there is a 'Related Information' section with an 'Add Analytics' button and a 'Performance Status' section that displays a message: 'You are not authorized for this page.'

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
Dixie Enriquez Ch, Hr Comp & Job Analysis	MDC-Annual Review EE	Approval - Submitted	04/26/2021 04/25/2022	04/18/2022
Emanuel Sumrall Senior Executive Secretary	MDC-Annual Review EE	Evaluation in Progress	04/22/2021 04/22/2022	04/15/2022

Note: The Current Performance Documents Page displays documents that are currently listed as “In Progress”.

Note: At this point, you can nominate a secondary preparer to review and comment on the employee's performance.

Lesson 2: Preparing an Employee's Evaluation as a Manager

2. Select the applicable **Manager Rating** from the dropdown.
3. Input the applicable details within the **Manager Comments** field.
4. Select the **Spell Check** option, if desired.

The screenshot displays the 'Performance Process' interface for 'MDC-Annual Review EE'. The main section is titled 'Manager Evaluation - Pending Approval'. Under 'Section 1 - PERFORMANCE OBJECTIVES', there is a sub-section 'QUANTITY OF WORK'. The 'Description' field contains the text 'Includes amount of work performed.' Below this, there is a table with the following data:

Manager Rating	Avg Rating
4 - Above Satisfactory	4 - Above Satisfactory

The 'Manager Comments' field is currently empty and contains the placeholder text 'Enter quantity of work here.' The 'Manager Rating' and 'Avg Rating' fields are highlighted with a red box. The interface also shows a sidebar with navigation options and a top navigation bar with the inForms logo.

Note: Please follow steps 2-4 for each sub-section within section one.

Lesson 2: Preparing an Employee's Evaluation as a Manager

5. Input Manager Comments in the Section 3 – Ways an Employee Can Improve section.

The screenshot displays the 'Performance Process' interface for 'MDC-Annual Review EE' for 'Dixie Enriquez'. The main content area shows 'Manager Evaluation - Pending Approval' with a 'Manager Rating' of 4 - Above Satisfactory and an 'Avg Rating' of 4 - Above Satisfactory (4.00). Below this is 'Section 3 - Ways employee can improve', which includes a 'Ways employee can improve Summary' section. A text input field labeled 'Manager Comments' is highlighted with a red box, containing the placeholder text 'enter manager comments here'. The sidebar on the left lists 'Steps and Tasks' including 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation', with 'Complete Manager Evaluation' being the active step. The 'Complete Manager Evaluation' step has sub-options: 'Update and Submit', 'Pending Approval' (highlighted), and 'Share with Employee'.

Lesson 2: Preparing an Employee's Evaluation as a Manager

6. Select the **Save** button.

7. Select the **Submit for Approval** button. The evaluation gets routed to the Reviewer. Finally, select the **Confirm** button.

The screenshot displays the 'Performance Process' web application interface. The main heading is 'Performance Process' with a sub-heading 'MOC Annual Review EE'. The page is titled 'Manager Evaluation - Update and Submit' and is for user 'Lola Zamora'. The interface includes a sidebar with 'Steps and Tasks' such as 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The main content area shows 'Employee Data' for 'Mits Specialist' (Employee ID: 00205376, Department: PERSONEL MANAGEMENT - SUPPORT) managed by 'Dena Kelly'. A 'Save' button and a 'Submit for Approval' button are highlighted with red boxes. Below the employee data, there is a section for 'Section 1 - PERFORMANCE OBJECTIVES' with a 'QUANTITY OF WORK' subsection. The 'Manager Rating' is set to '5 - Outstanding'. A 'Manager Comments' text area is visible with a rich text editor toolbar. The footer shows 'Template' and '12/17/2021 1:51PM'.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

- INFORMS will provide an email notification, with an embedded link to access the document, for the Reviewer to review and approve the performance evaluation. Reviewers can also view the document in their approvals tile in INFORMS.
- **Note:** The Reviewer cannot edit the evaluation. The Reviewer can only provide comments when approving or denying the evaluation.
- INFORMS will display a confirmation message once the Reviewer has approved the Performance Evaluation then route an email notification to the Manager.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

Navigate to Approvals

The screenshot shows the inForms application dashboard. At the top left is the Miami-Dade County logo. At the top right is the inForms logo and a navigation menu. Below the header is a teal bar with a "HOME" button. The main area contains a grid of 12 tiles:

- Finance / Supply Chain (FSCM): Icon of a dollar sign with arrows pointing outwards.
- Approvals**: Icon of a document with a checkmark. The number "18" is displayed in the bottom right corner. This tile is highlighted with a red border.
- Budget: Icon of a gear with a dollar sign.
- Scorecard: Icon of a bar chart with a line graph. Text: "COMING SOON".
- Employee Self-Service: Icon of a person with a document and a bar chart.
- Manager Self-Service: Icon of a person with a document and a bar chart.
- Human Resources (HCM): Icon of a person with a circular arrow.
- Learning (ELM): Icon of a person at a computer. Text: "COMING SOON".
- Analytics (OBIA): Icon of a laptop with a bar chart. Text: "COMING SOON".
- Capital: Icon of a hand holding a coin over buildings.
- Security Request Forms: Icon of a person at a desk. Text: "Coming Soon".
- About: The inForms logo.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

1. Select the **Performance** pane. Note, performance evaluation documents that have been prepared by the Rater and require approval by the Reviewer are displayed.
2. Select the **Performance** option for your employee and then select your employee.

The screenshot shows the 'informs' web application interface. The top navigation bar includes the Miami-Dade County logo, a 'HOME' button, the title 'Pending Approvals', and utility icons for home, search, chat, and menu. Below the navigation bar, there is a 'View By' dropdown menu set to 'Type'. On the left sidebar, there are two menu items: 'All' and 'Performance'. The 'Performance' item is highlighted with a red box and has a '1' in a circle next to it. The main content area displays a table with one row, also highlighted with a red box. The table row contains the following information: 'Performance' (with a sub-row 'Les Chatham'), '4 - Above Satisfactory' (with a sub-row '01/01/2021 To 01/01/2022'), and 'Routed' (with a sub-row '02/23/2022' and a right-pointing arrow). The text '1 row' is visible in the top right corner of the table area.

All			1 row
Performance	4 - Above Satisfactory	Routed	
Les Chatham	01/01/2021 To 01/01/2022	02/23/2022	>

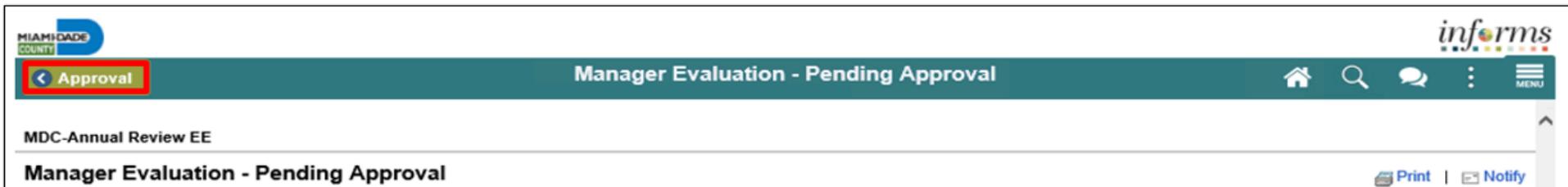
Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

3. Select the **View Document Detail** link.

The screenshot displays the 'Performance' page in the 'informs' system. At the top, there is a navigation bar with 'Pending Approvals' and 'Performance' tabs. The user 'Les Chatham, Accountant 2' is logged in, with 'Approve' and 'Deny' buttons. Below this, the 'Performance Summary' section shows document details: Document Type (MDC-Annual Review EE), Manager (Emerald Ritchie), Period Begin Date (01/01/21), Period End Date (01/01/22), and Rating (4 - Above Satisfactory). A red box highlights the 'View Performance Detail' link. Below the summary, there is an 'Approver Comments' field, also highlighted with a red box, and an 'Approval Chain' section.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

4. Review all sections of the performance evaluation document and check to see if the document contains any attachments.
5. Once the Reviewer has reviewed the entire performance evaluation, select the Approval button on the top left corner of the screen.



Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

6. Select the **Approver Comments** field and enter desired information. Once desired information is entered, click on **Approve** button.

Note the reviewer also has the option to deny in which case the reviewer would provide the reasons for denial. At this point the document will route back to the Rater (employee's manager) to be amended and the Rater will then have to resubmit the evaluation to the Reviewer.

The screenshot displays a web interface for reviewing a performance evaluation. At the top, there's a navigation bar with 'Pending Approvals' and 'Performance' tabs. Below this, the user 'Les Chatham, Accountant 2' is identified. A green 'Approve' button and a grey 'Deny' button are visible. The 'Performance Summary' section provides key details: Document Type (MDC-Annual Review EE), Manager (Emerald Ritchie), Period Begin Date (01/01/21), Period End Date (01/01/22), and Rating (4 - Above Satisfactory). A red rectangular box highlights the 'Approver Comments' text area, which is currently blank. Below the comments field is an 'Approval Chain' section with a right-pointing arrow.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

7. Select the **Submit** button.



The screenshot shows a dialog box with a light gray header. On the left is a 'Cancel' button, in the center is the word 'Approve' in orange, and on the right is a 'Submit' button with a green background and a red dashed border. Below the header, the text reads 'You are about to approve this request.' Underneath is a section titled 'Approver Comments' with a text area containing the text 'I approve the evaluation for Les Chatham for this evaluation peri'. The text area has a vertical scrollbar on the right side.

Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

8. **Select Pending Approvals** to check if there are any more approvals pending.



← Pending Approvals

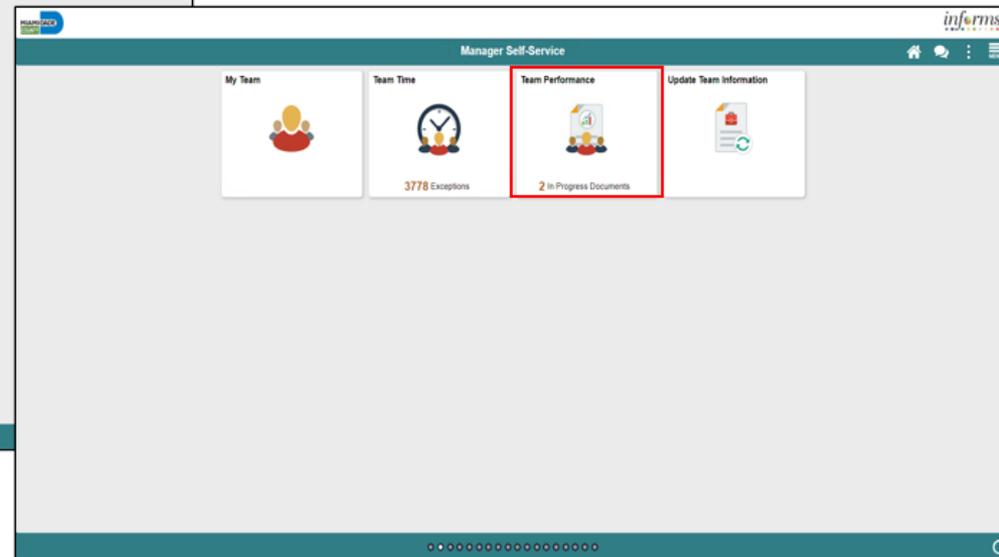
Performance

Les Chatham
Accountant 2

✓ Approved on 02/24/2022

Lesson 4: Share Evaluation with Employee as Manager

Navigate to **Manager Self-Service > Team Performance**



Lesson 4: Share Evaluation with Employee as Manager Continued

1. Select **Current Document** and then **MDC-Annual Review EE**.

The screenshot shows the 'informs' interface for 'Team Performance'. On the left, a sidebar menu has 'Current Documents' highlighted with a red box. The main area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with one row highlighted in yellow and also enclosed in a red box. The table columns are: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 Les Chatham Accountant 2	MDC-Annual Review EE	Approval - Approved	01/01/2021 01/01/2022	12/25/2021

Lesson 4: Share Evaluation with Employee as Manager Continued

2. Select Share with Employee.

The screenshot displays the 'Performance Process' interface for 'MDC-Annual Review EE'. The left sidebar shows a list of steps and tasks, with 'Share with Employee' highlighted in a red box. The main content area shows the 'Manager Evaluation - Update and Share' page for 'Les Chatham', including a profile picture, job title, document type, template, status, and employee data.

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Team Performance Performance Process Home Search Chat Menu

Performance Process Share with Employee

Steps and Tasks

Les Chatham
MDC-Annual Review EE
01/01/2021 - 01/01/2022 Overview

- Nominate Participants
Due Date 12/25/2021
- Review Participant Evaluations
Due Date 12/25/2021
- Review Self Evaluation
Due Date 12/18/2021
- Complete Manager Evaluation
Due Date 12/25/2021
 - Update and Submit
 - Pending Approval
 - Share with Employee**

MDC-Annual Review EE

Manager Evaluation - Update and Share Print | Notify

Les Chatham

Actions

Job Title	Accountant 2	Manager	Emerald Ritchie
Document Type	MDC-Annual Review EE	Period	01/01/2021 - 01/01/2022
Template	Employee Performance Eval	Document ID	28399
Status	Approval - Approved	Due Date	12/25/2021

Employee Data

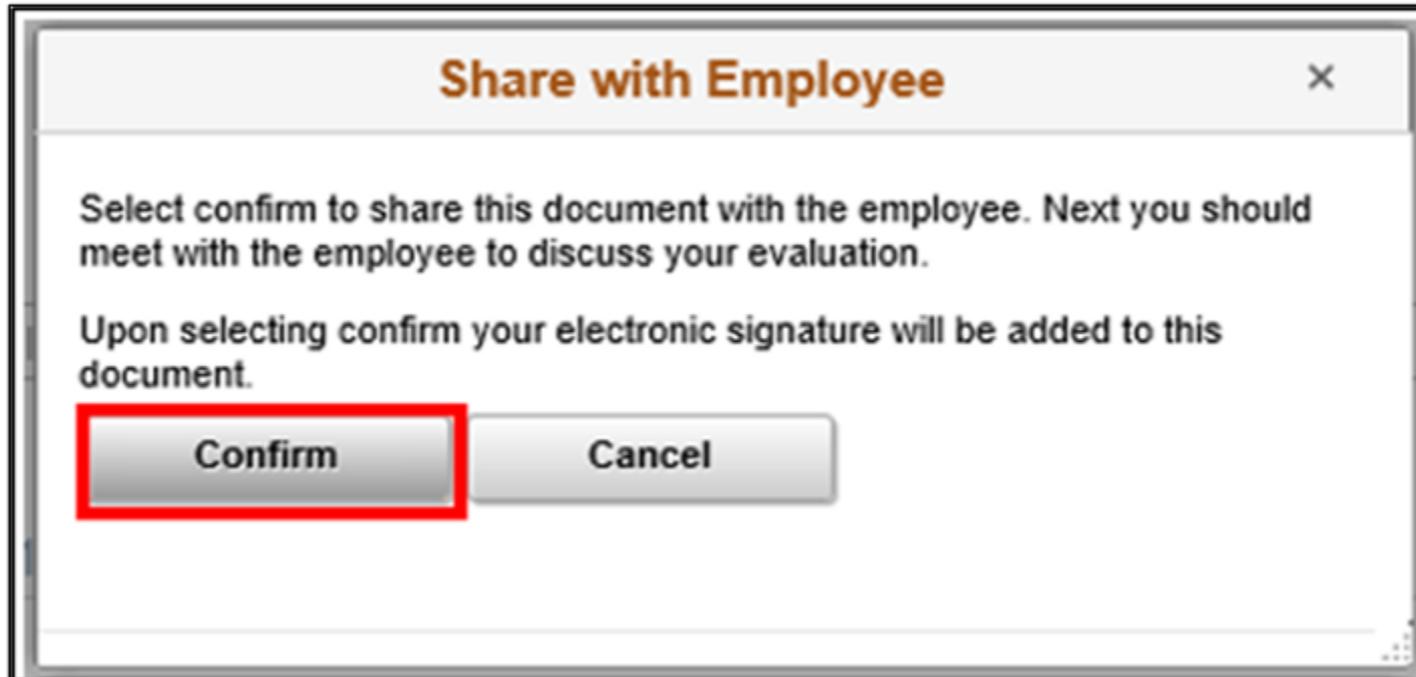
Employee ID	00319256
Department	FN06020000 ACCOUNTING SECTION

Expand All | Collapse All | View Graphical Rating

MIAMI DADE COUNTY 29

Lesson 4: Share Evaluation with Employee as Manager Continued

3. Select the **Confirm** button. This will complete the process. The evaluation will close out (edits can no longer be made) and move to the employee's historical folder as well as the manager's historical folder.



Course Summary

Congratulations on completing the overview of Manager Self-Service ePerformance Management. You now understand how to:

- Request Nominations
- Prepare an Evaluation as a Manager
- Review an Employee Evaluation as a Manager's Supervisor
- Share the Evaluation with your Employee as a Manager



Additional Training and Job Aids

Users may be eligible to take the following training courses based on their INFORMS roles:

- **INFORMS Training Webpage:**

- <https://www.miamidade.gov/global/humanresources/training/informs.page>

User Productivity Kits (Available on the INFORMS Training Webpage):

- Prepare an Employee's Evaluation as a Manager
- Review an Employee's Evaluation as a Manager's Supervisor
- Share the Evaluation with the Employee as a Manager
- Request Nominations

For additional information, be sure to visit:

- www.miamidade.gov/informs