

Miami-Dade County



End-User Training Guide

Course Code: DPR 301

**Course: Departmental HR – ePerformance
Management (Employee Performance
Evaluation)**

Course Overview

Course Description This course provides a comprehensive review of the ePerformance Management. This course consists of the following modules:
Module 1: Course Introduction
Module 2: ePerformance Management
Module 3: Course Summary

Training Audiences The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related INFORMS access:
Department Personnel Representative (DPR)

Prerequisites Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of ERP
- ERP 102 – INFORMS Navigation, Reporting, and Online Help
- HCM 101 – Introductory Course - Human Resources Fundamentals

Other Related Courses Participants can attend the other related courses to Departmental HR:

- DPR 302 – Departmental HR - Personnel Changes
- DPR 303– Departmental HR - Time Management
- DPR 304 – Departmental HR - Updating Team Information
- DPR 321 – Departmental HR - Recruitment

Delivery Method This course is intended to be delivered through Instructor-led Training.

Estimated Duration The total duration of this course, when delivered through Instructor-led Training, is 5 hours

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Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted INFORMS access for performing related tasks in INFORMS, participants must:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

- Course Learning Objectives** At the conclusion of this course, participants will be able to:
- Perform Administrative Tasks
 - Complete a Performance Evaluation as a DPR
 - Understand Performance Reports and Queries

Module 1: Course Introduction

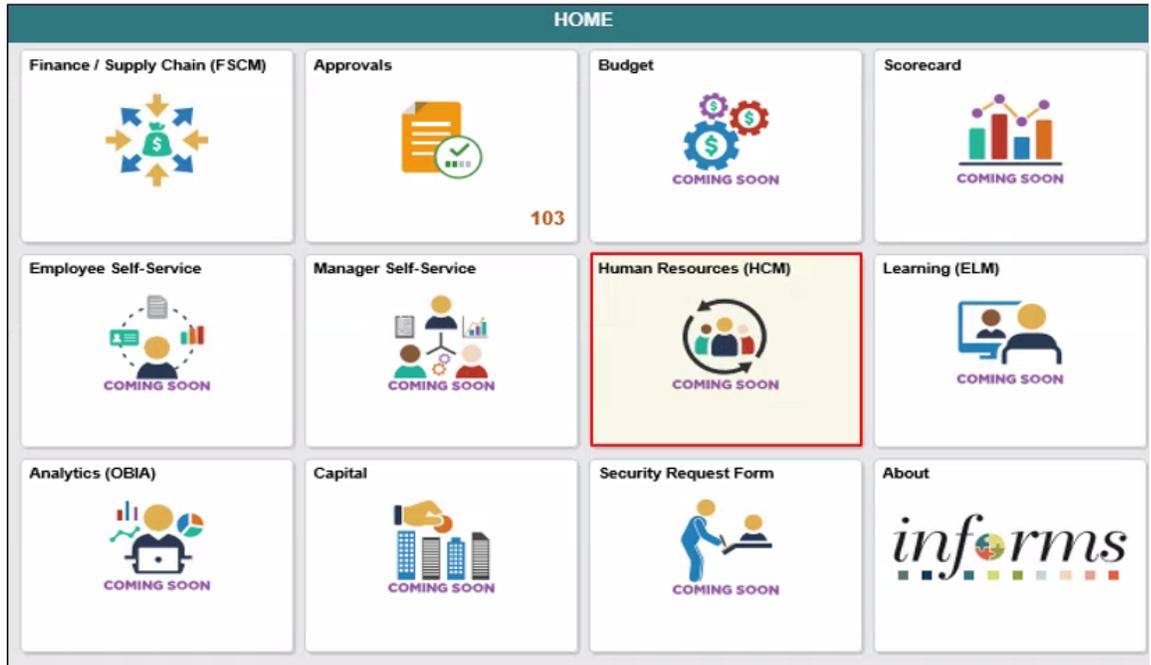
Training Audience:	The following roles are associated with this course and will play a part in conducting the related business processes for the County:
Roles and Responsibilities	Department Personnel Representative (DPR): The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Module 1: Course Introduction

Navigation

Below are the steps to navigate to ePerformance Management, which will be used for navigation in the rest of this course:

Login to INFORMS and select the Human Resource (HCM) tile from the HOME landing page.



There are multiple navigation routes within this course past the HCM tile.

Module 1: Course Introduction

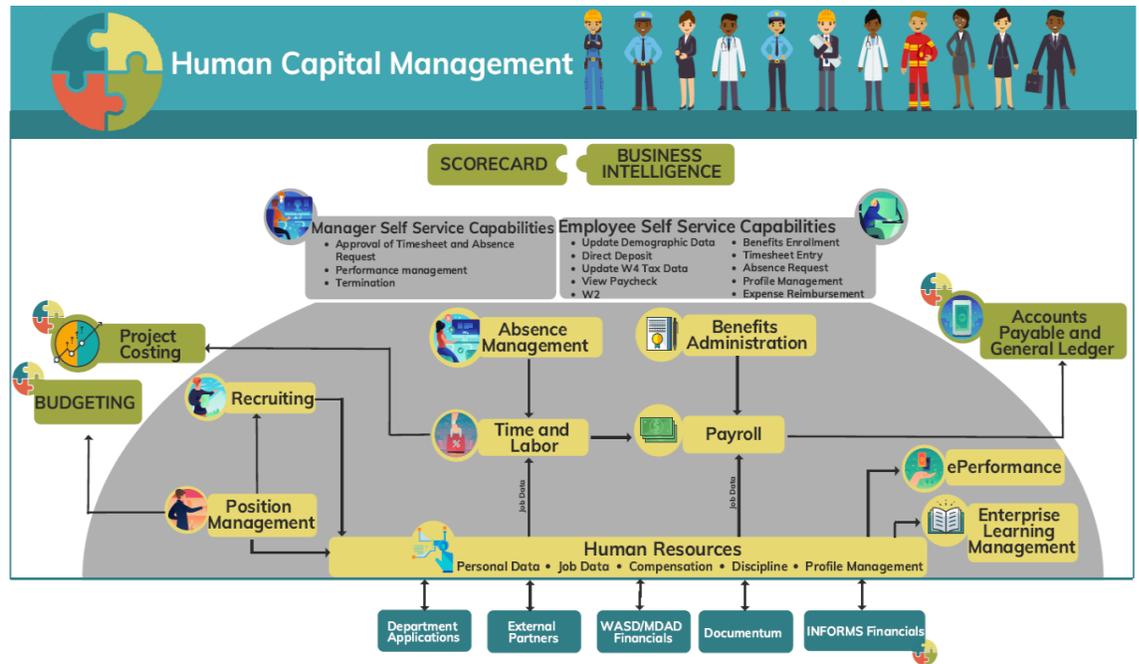
Purpose and Benefits of the Business Process

The purpose and benefits of the Employee Self-Service business process include:

- Automation of County workforce performance evaluation business process
- Data persistence – old INFORMS data is never deleted, only past-effective dated and inactivated (superseded)
- Decreased data redundancy - Perform all performance evaluation administration activities in a single common system (INFORMS) - eliminating manual data re-keying, reducing data entry errors and improving data quality
- 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/rapid pro forma and ad hoc report development and deployment capabilities
- Ensure dynamic compliance with Human Resources business logic and consistent/identical business processes, Payroll salary grade table, Administrative Orders, Personnel Rules and ratified Collective Bargaining Agreements
- Improve workforce efficiency via collaborative processing – reviewers and approvers
- Logical separation of duties - Department Personnel Representatives (DPR) role ensures Central HR control and consistency from a dedicated Departmental context and perspective
- Robust technical platform – high on-demand availability with minimum downtime, scalable, 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
- Workforce resource processing effort smoothing – Performance reviews business process is driven by anniversary dates and collective bargaining agreement ratification dates, not by arbitrary calendar dates or all at the same time

Module 1: Course Introduction

The End-to-End Business Process



Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demo



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.

Module 1: Course Introduction

Module 1:	The following key concepts were covered in this module:
Course	The End-to-End Process of Performance Evaluation Administration
Introduction	
Summary	Learning Objectives Roles and Responsibilities Navigation Key Changes to the Business Process The End-to-End Business Process Introduction to Demonstrations, Activities, and Exercises

Module 2: ePerformance Management

Introduction to Module 2: ePerformance Management

This module includes the following lessons:

Module Introduction

Lesson 1: Administrative Tasks

- **Lecture 1:** Manually Create Documents
- **Lecture 2:** Cancel Evaluation
- **Lecture 3:** Transfer Evaluation
- **Lecture 4:** Re-Open Evaluation

Lesson 2: Completing Evaluation

- **Lecture 1:** Initiate Merit Increase

Lesson 3: Reports and Queries

Lesson 1: Administrative Task

Lesson 1: Overview

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

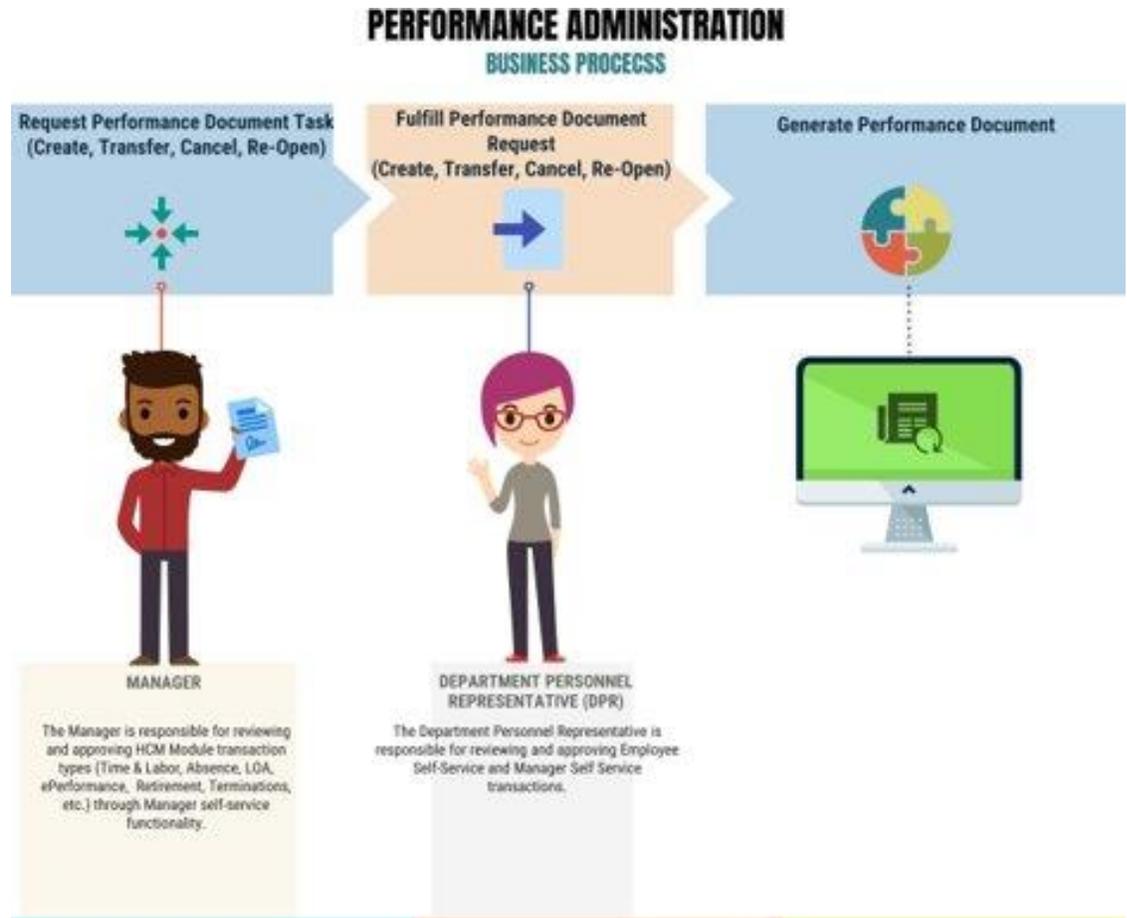
- Manually Create Performance Documents
- Cancel Performance Evaluation Documents
- Transfer Performance Evaluation Documents
- Re-Open Performance Evaluation Documents

Only DPRs perform Administrative Tasks in INFORMS.

Performance Improvement Plan (PIP) is a new function in 9.2 over the old system. The Performance Improvement Plan is a new feature the INFORMS HCM-ePerformance Module. This new functionality allows the DPR to create an electronic performance improvement document leveraging existing workflow functionality and consolidating all performance evaluation activities into one source. This document allows the manager to set specific performance goals/benchmarks to help improve the employee's performance in their job. Please note these documents are generated on an as needed basis in cooperation with your Department Personnel Representative and Departmental Management.

Lesson 1: Administrative Task

Lesson 1: Introduction



Department Personnel Representatives (DPRs) use INFORMS to fulfill performance management administrative tasks such as

- Generating performance documents such as performance improvement plans (PIP) and, when necessary, performance evaluation documents
- Transferring responsibility for performance evaluation documents from one Manager to another Manager
- Canceling performance evaluation documents
- Re-opening performance evaluation documents

Administrative Tasks are only performed in INFORMS by DPRs.

Lesson 1: Administrative Task

Key Terms



The following key terms are used in this module:

Term	Definition
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 varies based upon which Employee will be reviewed: MDC SR. MANAGEMENT MX (for Management Evaluation), MDC-Annual Review EE (for Employee Evaluation), or MDC-Prof/Supervisory Review ME (for Senior Manager Evaluation).
Performance Improvement Plan (PIP)	A performance document generated in INFORMS by the DPR at a Manager's request. Managers use PIPs to set specific performance goals/benchmarks to help improve their employee's performance when applicable.
Create	The process of generating an Employee's performance document.
Transfer	The process of re-assigning responsibility for an Employee's performance evaluation document from one Supervisor to another Supervisor within their Business Unit.
Re-Open	The process of re-opening a performance evaluation document's Document Status from "Completed" to "Evaluation In Progress".
Cancel	The process of updating a performance evaluation document's Document Status to "Cancelled". A Cancelled performance evaluation document is no longer visible to the Supervisor or the Employee.

Lesson 1: Administrative Task

- Lecture 1:
Administrative
Tasks (Manually
Create
Evaluation)
- At the conclusion of this lesson, you will be able to:
- Create Performance Documents
 - Cancel Performance Evaluation Documents
 - Transfer Performance Evaluation Documents
 - Re-Open Performance Evaluation Documents

Only DPRs perform Administrative Tasks in INFORMS.

Performance Improvement Plan (PIP) is a new function in 9.2 over the old system. The Performance Improvement Plan is a new feature the INFORMS HCM-ePerformance Module. This new functionality allows the DPR to create an electronic performance improvement document leveraging existing workflow functionality and consolidating all performance evaluation activities into one source. This document allows the manager to set specific performance goals/benchmarks to help improve the employee's performance in their job. Please note these documents are generated on an as needed basis in cooperation with your Department Personnel Representative and Departmental Management.

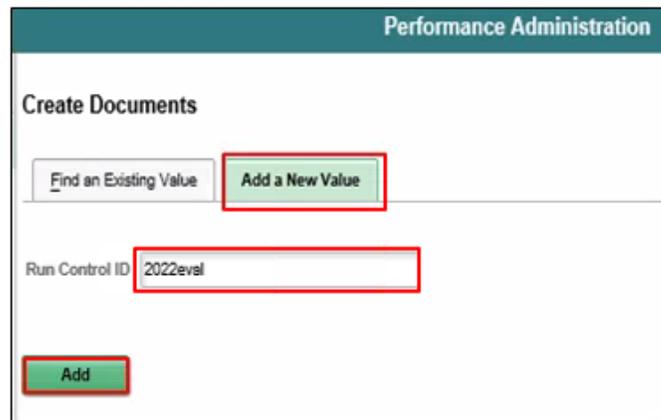
Lesson 1: Administrative Task

Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

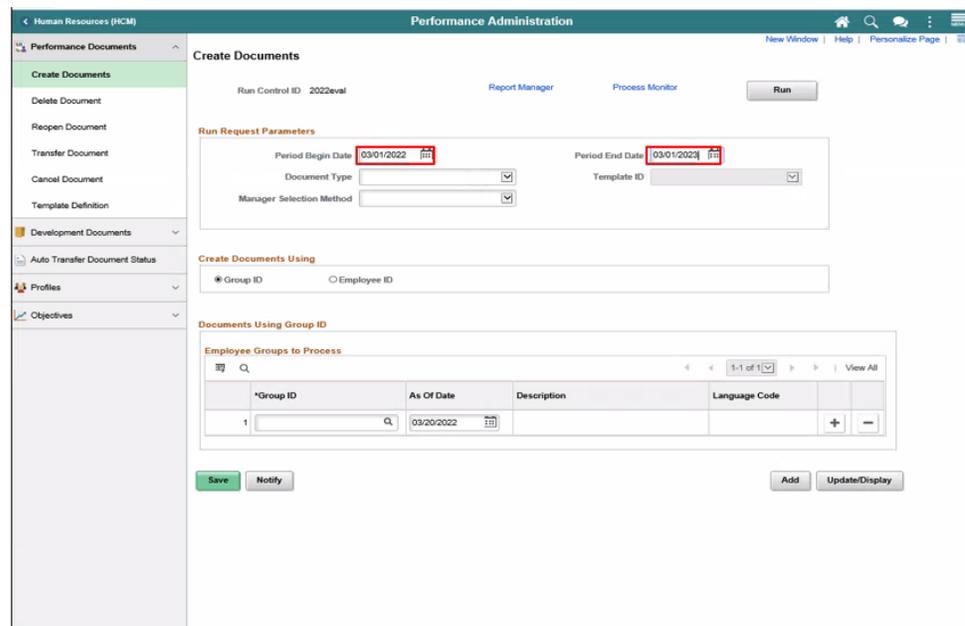
This Lecture will review how to generate performance documents manually. As with all Performance Administrative Tasks, this Performance Administrative task must be fulfilled by a DPR.

Navigation: Human Resource (HCM) > Performance Administration > Performance Documents > Create Documents

1. Select the **Add a New Value** tab.
2. Enter a name in the **Run Control ID** field.
3. Select the **Add** button.



4. Enter the date that the Employee’s evaluation period began in the **Period Begin Date** field.
5. Enter the date that the Employee’s evaluation period ended in the **Period End Date** field.



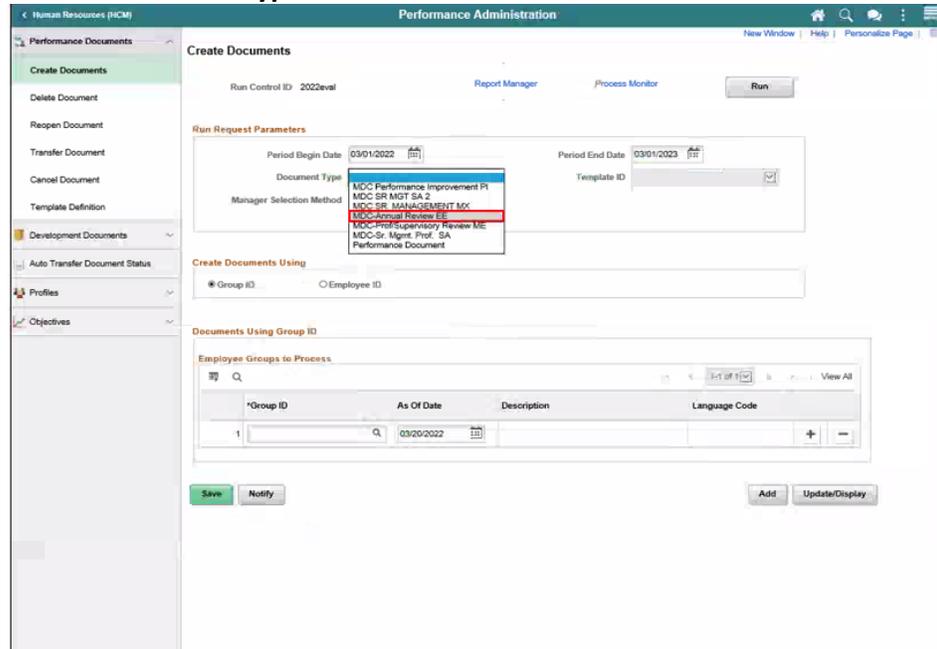
Lesson 1: Administrative Task

Lecture 1:
Administrative Tasks
(Manually Create Evaluation)

Depending on the Employee, the DPR should select one of the following types of evaluation documents:

Document Type	Description
MDC SR. MANAGEMENT MX	Senior Management/Executive Evaluation
MDC-Annual Review EE	Employee Evaluation
MDC-Prof/Supervisory Review ME	Professional/Management Evaluation

6. Select the **Document Type** list and select the desired Performance Document.

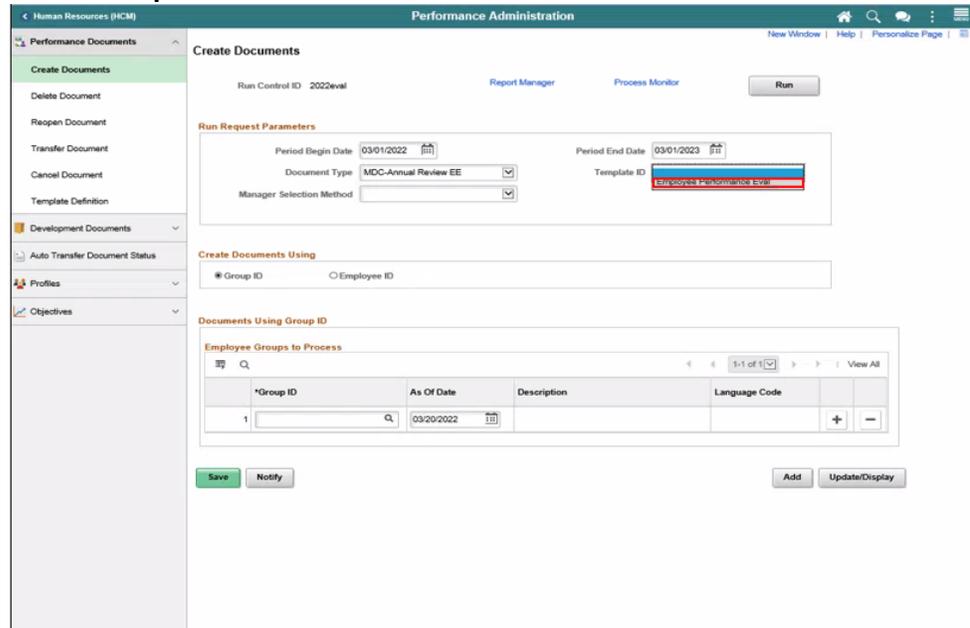


Lesson 1: Administrative Task

Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

INFORMS uses a default **Template ID Type** based upon which Performance Document was selected in the previous step.

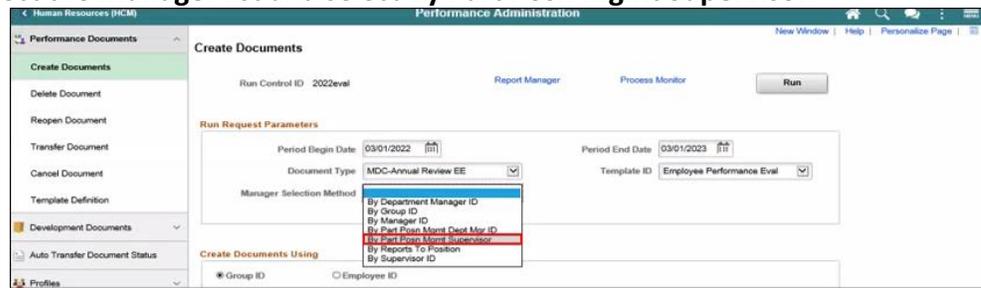
7. Select the **Template ID** list and select the desired list item.



Lesson 1: Administrative Task

Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

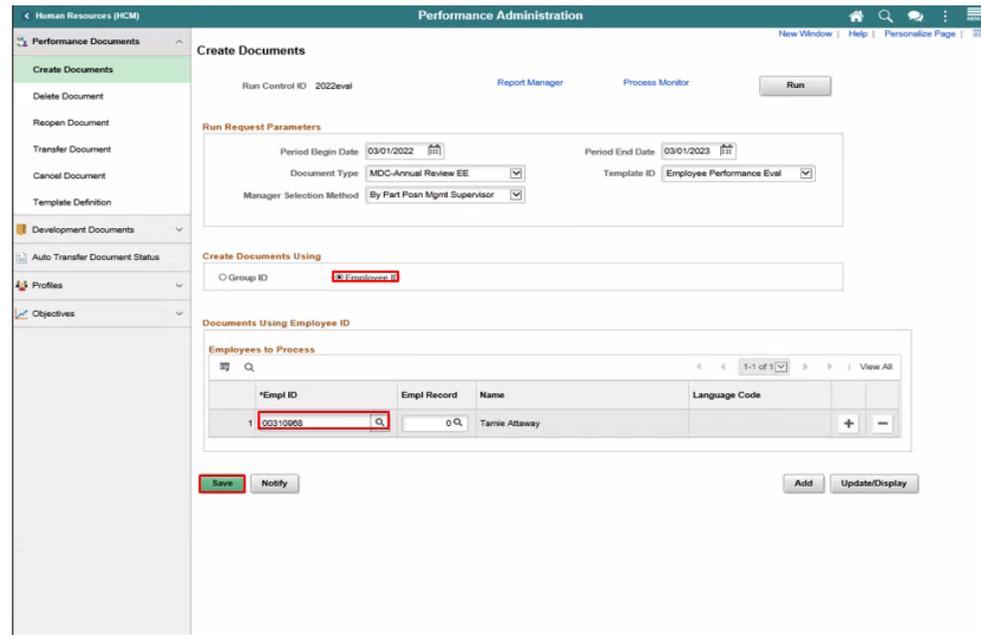
8. Select the **Manager** list and select **By Part Posn Mgmt Supervisor**.



9. Select the **Employee ID** option.

10. Select the **Empl ID field**, then enter the Employee's ID.

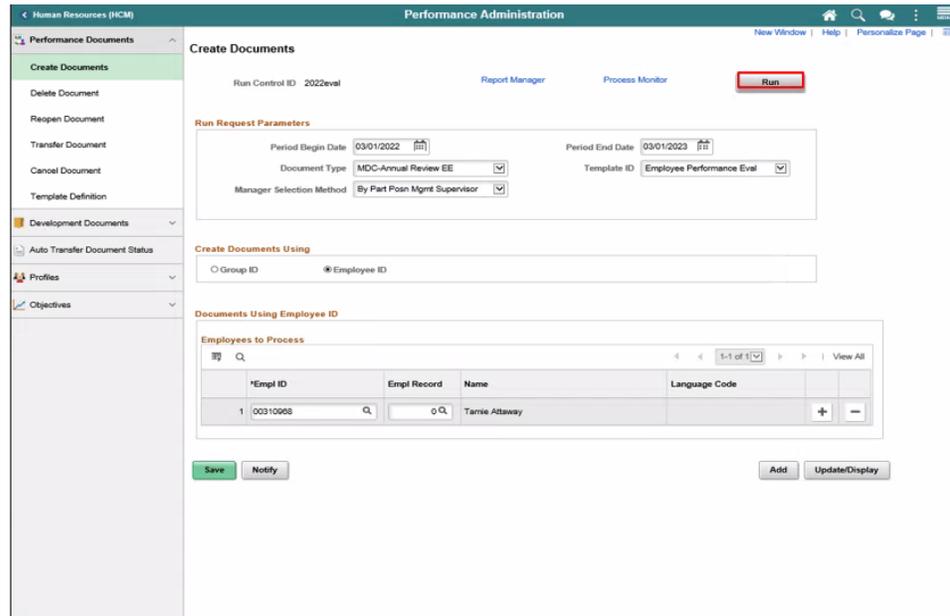
11. Select the **Save** button.



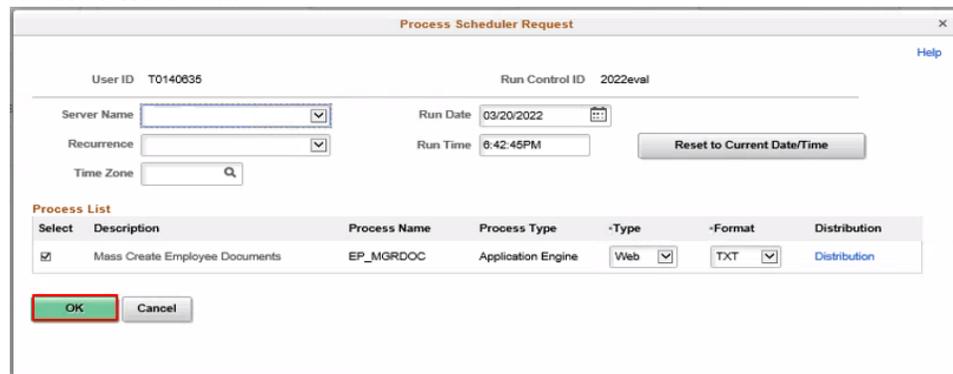
Lesson 1: Administrative Task

Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

12. Select the **Run** button.



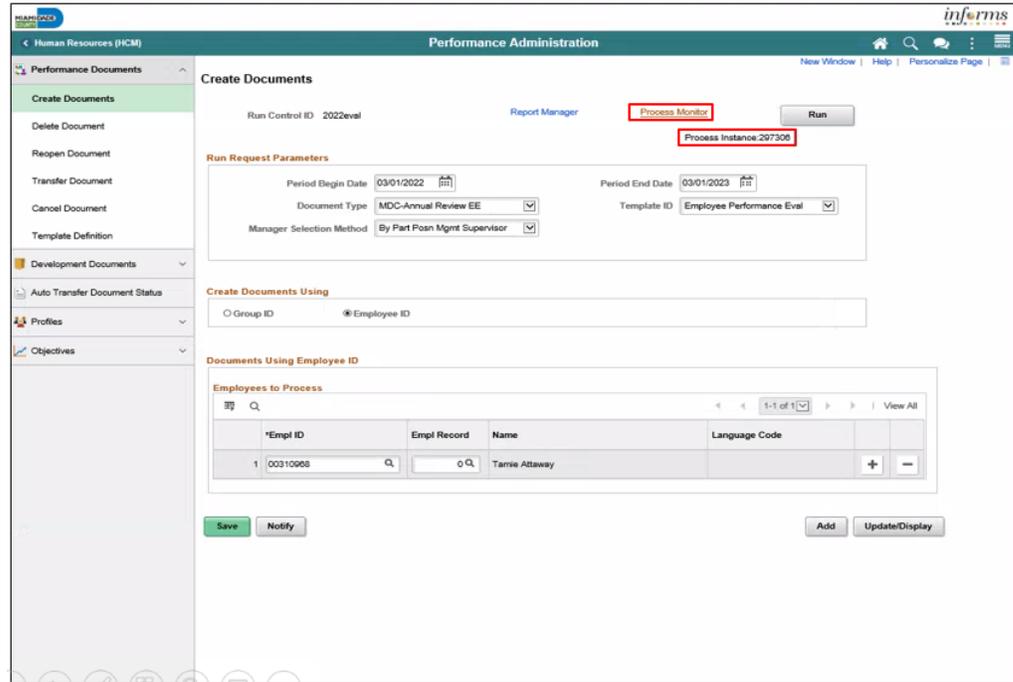
13. Select the **OK** button.



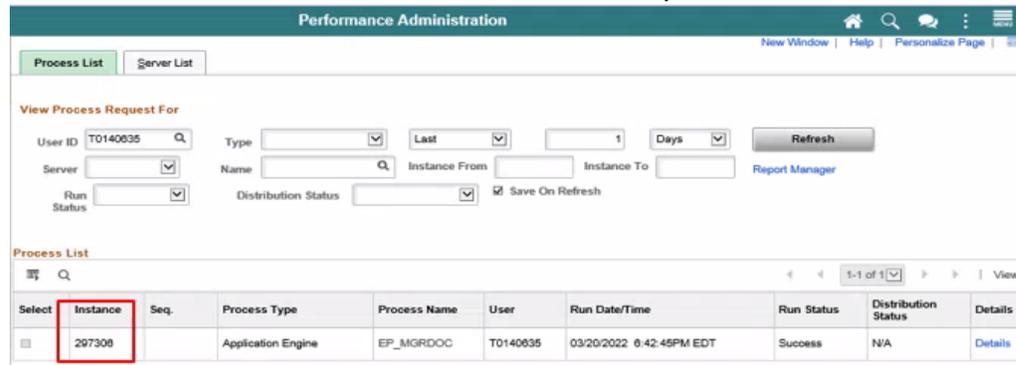
Lesson 1: Administrative Task

Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

14. Note the **Process Instance** number, then select the **Process Monitor** link.



15. Recall the **Process Instance** number in order to identify the correct row.

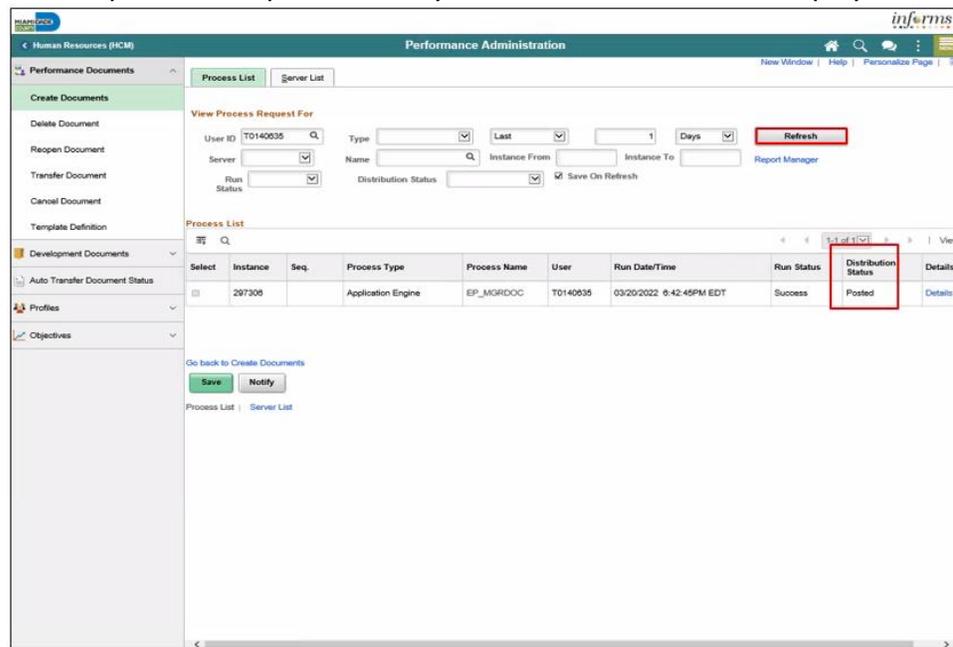


Lesson 1: Administrative Task

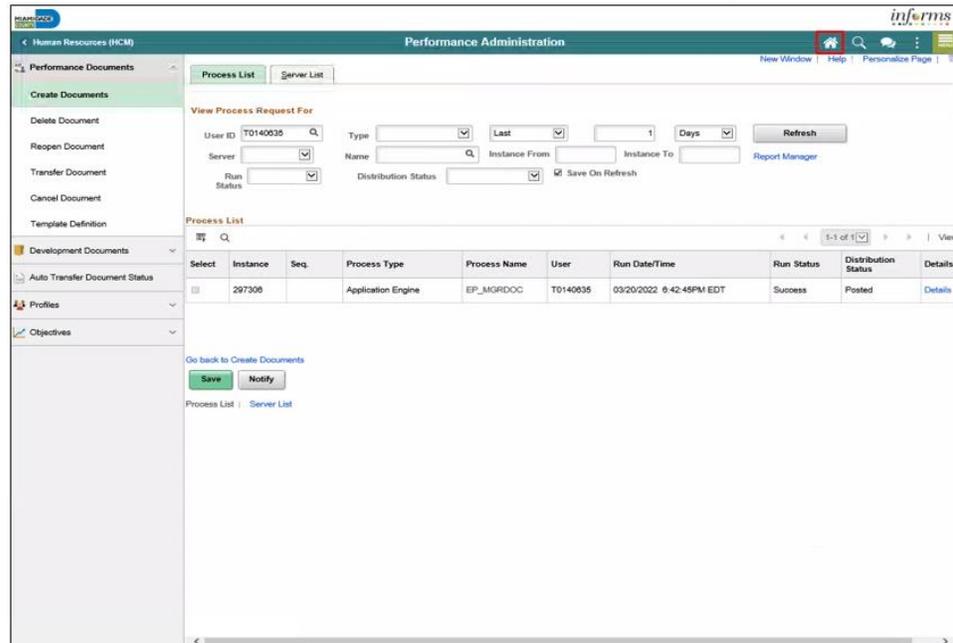
Lecture 1:
Administrative
Tasks
(Manually
Create
Evaluation)

16. Select the **Refresh** button.

17. Repeat the previous step occasionally until **Distribution Status** displays “Posted”.



18. Select the **Home** button to return to the INFORMS homepage.



The DPR has generated a Performance Evaluation document manually and should navigate in INFORMS to validate and view the document.

Lesson 1: Administrative Task

Lecture 1: Administrative Tasks (Manually Create Evaluation)

After generating a performance evaluation manually, the DPR may validate their results as follows:

- To view the results of running the process to generate performance documents manually, navigate to **NavBar > Navigator > Human Resources (HCM) > Workforce Development > Performance Management > View Document Creation Results.**
- To view all performance evaluation documents, navigate to **NavBar > Navigator > Human Resources (HCM) > Workforce Development > Performance Management > Performance Documents > View Documents.**

Lesson 1: Administrative Task

Lecture 2: Administrative Task - Cancel Performance Evaluation Documents

From time to time, Performance Evaluation Documents may need to be cancelled in INFORMS. As with all Performance Administrative Tasks, this Performance Administrative task must be fulfilled by a DPR.

Navigation: Human Resource (HCM) > Performance Administration > Performance Documents > Cancel Document

There are many different ways to search for the Evaluation. Here is one example:

1. Enter the **Manager's First Name** of the Manager who requested the cancellation.
2. Enter the **Last Name** of the Manager who requested the cancellation.
3. Select the **Search** button.

4. Find and select the desired Evaluation row **option**.
5. Scroll down (if necessary) and select the **Continue** button.

ID	Name	Title	Status	Start Date	End Date	Manager	Reviewer
00183225	Leyla Carranza	MDC-Prof/Supervisory Review ME	Completed	02/05/2010	02/06/2011	Erp Senior Developer	Michael Krug
00139131	Lita Lapierre	MDC-Prof/Supervisory Review ME	Completed	04/09/2019	04/05/2020	Erp Business Analyst 3	Lavonda Holtzman
00158005	Marnie Gleser	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Erp Business Analyst 3	Lavonda Holtzman
00317219	Marisa Strick	MDC-Prof/Supervisory Review ME	Completed	07/01/2019	06/28/2020	Accountant 3	Lavonda Holtzman
00009735	Mila Baum	MDC-Prof/Supervisory Review ME	Completed	12/13/2010	12/11/2011	Erp Senior Developer	Michael Krug
00009735	Mila Baum	MDC-Prof/Supervisory Review ME	Completed	12/14/2009	12/12/2010	Erp Senior Developer	Michael Krug
00013831	Myla Nagy	MDC-Prof/Supervisory Review ME	Completed	05/21/2018	05/19/2019	Erp Systems Support Manager	Lavonda Holtzman
00013831	Myla Nagy	MDC-Prof/Supervisory Review ME	Completed	05/22/2017	05/20/2018	Erp Systems Support Manager	Lavonda Holtzman
00013831	Myla Nagy	MDC-Prof/Supervisory Review ME	Completed	05/23/2016	05/21/2017	Erp Systems Support Manager	Lavonda Holtzman
00079738	Nisa Paulsen	MDC-Prof/Supervisory Review ME	Completed	12/16/2019	12/13/2020	Erp Business Analyst 3	Lavonda Holtzman
00323923	Palma Coppola	MDC-Prof/Supervisory Review ME	Completed	07/01/2018	06/28/2020	Administrative Officer 2	Lavonda Holtzman
00018302	Paola Strang	MDC-Prof/Supervisory Review ME	Completed	09/10/2018	09/08/2019	Assistant Tax Collector	Lavonda Holtzman
00014302	Paola Strang	MDC-Prof/Supervisory Review ME	Completed	09/11/2017	09/09/2018	Assistant Tax Collector	Lavonda Holtzman
00018302	Paola Strang	MDC-Prof/Supervisory Review ME	Completed	09/12/2016	09/10/2017	Assistant Tax Collector	Lavonda Holtzman
00323913	Swaha Osborn	MDC-Prof/Supervisory Review ME	Completed	07/15/2019	07/12/2020	Administrative Officer 2	Lavonda Holtzman
00211062	Tian Samples	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Intl Enterprise Portfolio Mgr	Lavonda Holtzman
00211062	Tian Samples	MDC-Prof/Supervisory Review ME	Completed	12/18/2017	12/16/2018	Intl Enterprise Portfolio Mgr	Lavonda Holtzman
00211062	Tian Samples	MDC-Prof/Supervisory Review ME	Completed	12/19/2016	12/17/2017	Intl Enterprise Portfolio Mgr	Lavonda Holtzman
00211062	Tian Samples	MDC-Prof/Supervisory Review ME	Completed	12/21/2015	12/18/2016	Intl Enterprise Portfolio Mgr	Lavonda Holtzman
00211062	Tian Samples	MDC-Prof/Supervisory Review ME	Completed	06/01/2010	05/31/2011	Intl Enterprise Portfolio Mgr	Michael Krug
00208815	Titian Urena	MDC-Prof/Supervisory Review ME	Completed	05/20/2019	05/17/2020	Erp Project Manager	Lavonda Holtzman
00208815	Titian Urena	MDC-Prof/Supervisory Review ME	Completed	11/01/2010	10/30/2011	Erp Project Manager	Michael Krug
00208815	Titian Urena	MDC-Prof/Supervisory Review ME	Completed	11/02/2009	10/31/2010	Erp Project Manager	Michael Krug

Lesson 1: Administrative Task

Lecture 2: Administrative Task - Cancel Performance Evaluation Documents

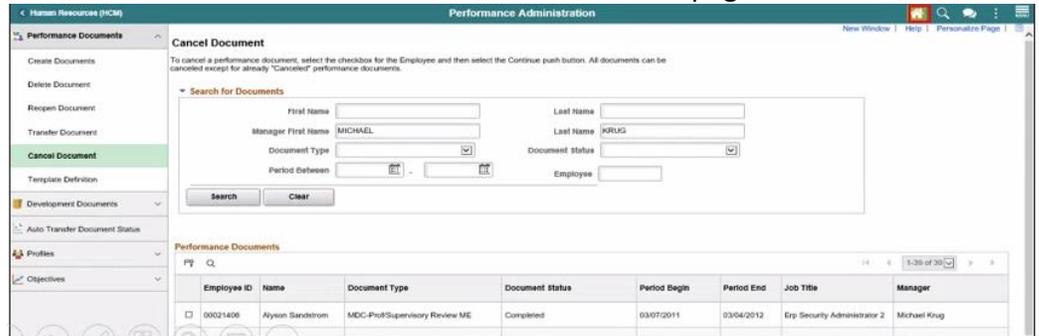
6. Select the **Save** button.



7. Select the **OK** button.



8. Select the **Home** button to return to the INFORMS homepage.



The DPR validates that the Performance Evaluation document was canceled by searching by the same criteria as before and confirming that the Evaluation is no longer in the list.

Lesson 1: Administrative Task

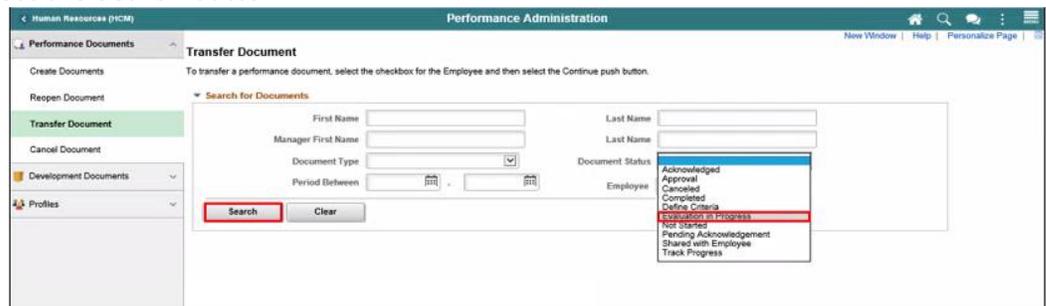
Lecture 3:
Administrative Task –
Transfer Performance Evaluation Documents

From time to time, responsibility for completing an Employee’s Performance Evaluation Document may need to be reassigned from one Manager to another Manager in the same Business Unit. In that case, a DPR must perform the Transfer in INFORMS.

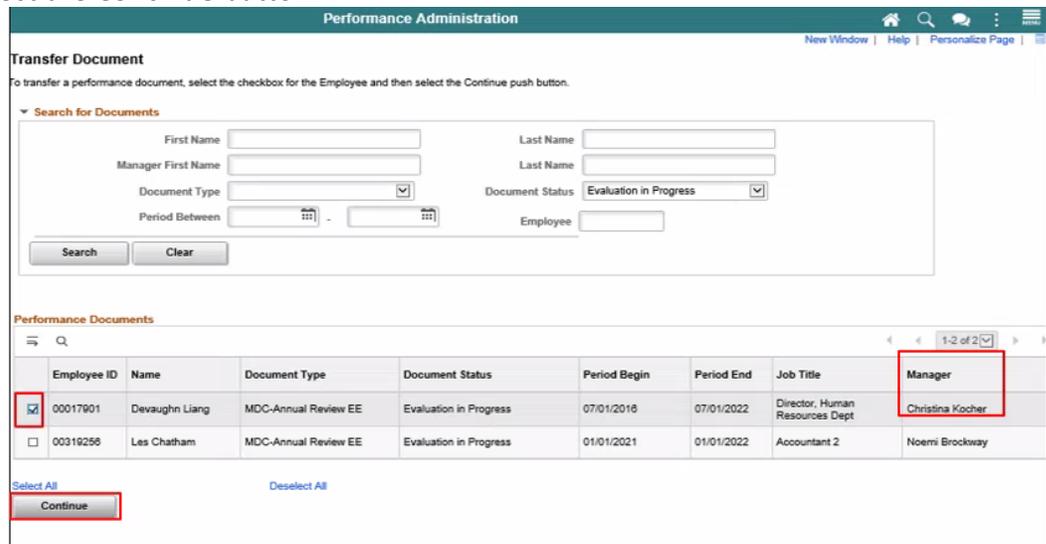
Navigation: Human Resource (HCM) > Performance Administration > Performance Documents > Transfer Document

There are many different ways to search for the Evaluation. Here is one example:

1. Select the **Document Status** list.
2. Select the **Evaluation in Progress** list item.
3. Select the **Search** button.



4. Select the desired Employee ID's **option**.
5. Note the name displayed in the Manager field.
6. Select the **Continue** button.

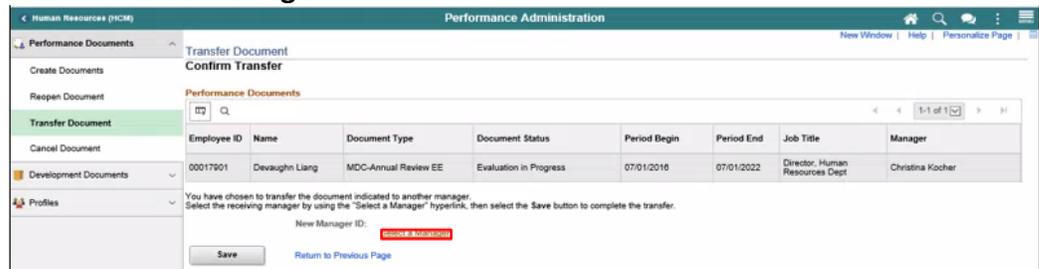


Lesson 1: Administrative Task

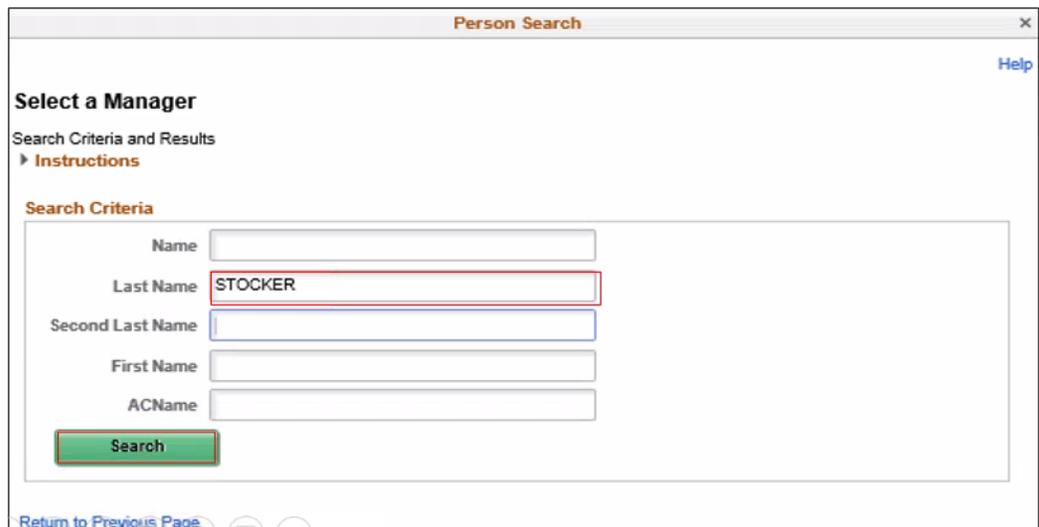
Lecture 3:
Administrative
Task –
Transfer
Performance
Evaluation
Documents

Next, transfer responsibility to a different Manager in the same Business Unit:

7. Select the **Select a Manager** link.



8. Select in the Manager’s **Last Name** in the **Last Name** field.
9. Select the **Search** button.



Lesson 1: Administrative Task

Lecture 3:
Administrative
Task –
Transfer
Performance
Evaluation
Documents

10. Select the Kilvondra Stocker **option**.
11. Select the **OK** button.

Person Search [Close]

[Help](#)

Select a Manager

Search Criteria and Results

[Instructions](#)

Search Criteria

Name:

Last Name:

Second Last Name:

First Name:

ACName:

Search Results

<input type="radio"/>	Domitila Stocker	i
<input checked="" type="radio"/>	Kilvondra Stocker	i
<input type="radio"/>	Ron Lee Stocker	i
<input type="radio"/>	Vangie Stocker	i

[Return to Previous Page](#)

12. Select the **Save** button.

Performance Administration

Transfer Document

Confirm Transfer

Performance Documents

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2018	07/01/2022	Director, Human Resources Dept	Christina Kocher

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.

New Manager ID: [Kilvondra Stocker](#)
[Select a Manager](#)

[Return to Previous Page](#)

Lesson 1: Administrative Task

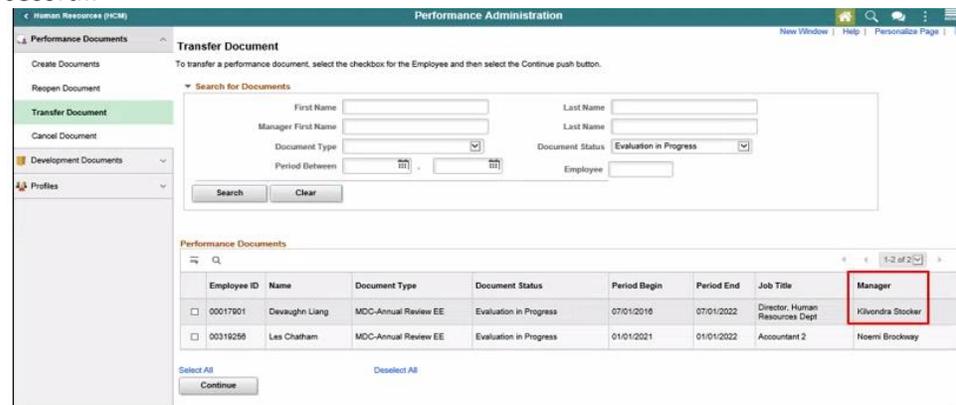
Lecture 3:
Administrative
Task –
Transfer
Performance
Evaluation
Documents

The message confirms that responsibility for the Performance Evaluation has been transferred from the original Manager to the Manager that the DPR selected.

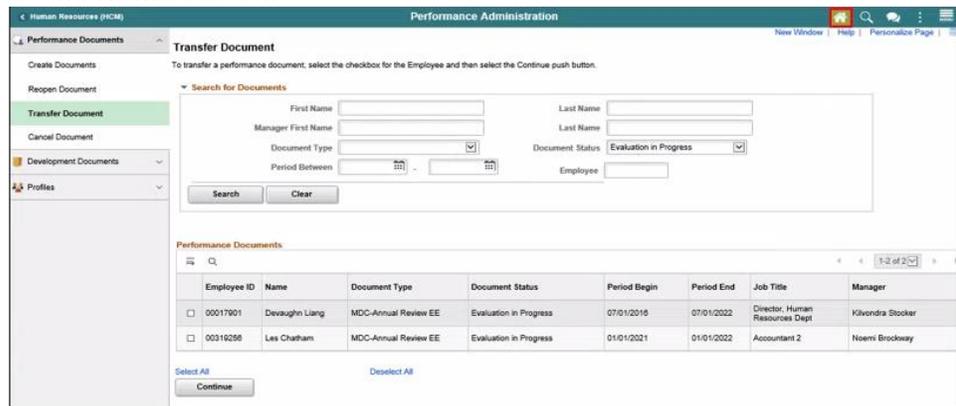
13. Select the **OK** button.



14. Note that the **Manager** field displays the name of the Manager that the Performance Management document was transferred to. This validates that the Transfer was successful.



15. Select the **Home** button.



The DPR has transferred responsibility for a Performance Evaluation document from one Manager to another Manager and validated that the transfer was successful.

Lesson 1: Administrative Task

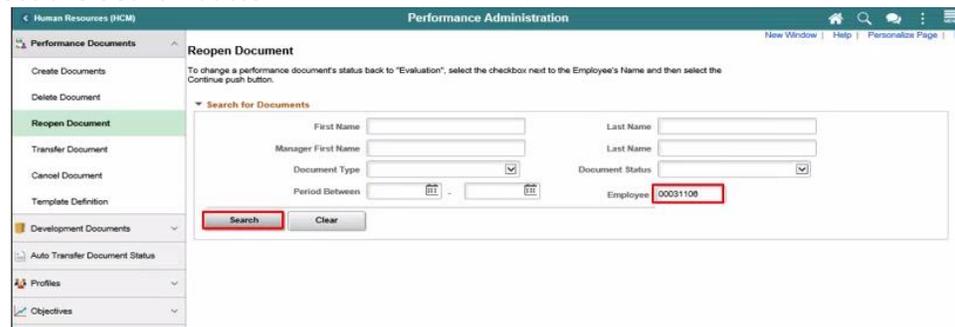
**Lecture 4:
Administrative
Task – Re-
Open
Performance
Evaluation
Documents**

In this Scenario, a Manager has informed their DPR that an Employee’s Performance Evaluation Document needs to be re-opened. The DPR must re-open the Performance Evaluation Document in INFORMS.

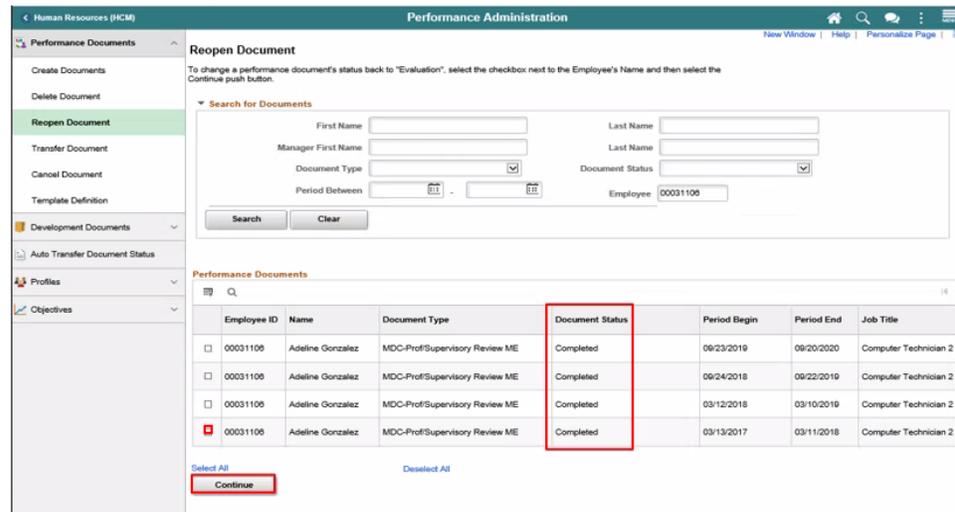
Navigation: Human Resource (HCM) > Performance Administration > Performance Documents > Reopen Documents

There are many different ways to search for the Evaluation. Here is one example:

1. Select the **Employee** field.
2. Enter the Employee's Employee Number into the **Employee** field.
3. Select the **Search** button.



4. Note that four evaluation documents for this Employee display a **Document Status** of “Completed”. These four evaluation documents are closed.
5. Select the evaluation to be re-opened.
6. Select the **Continue** button.



Lesson 1: Administrative Task

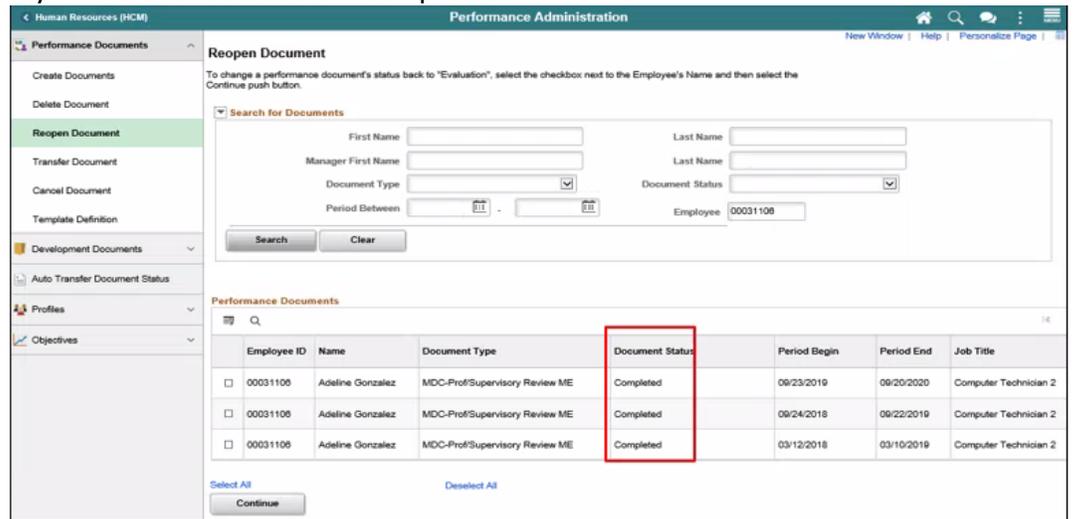
Lecture 4:
Administrative Task – Re-Open Performance Evaluation Documents

7. Select the **OK** button.



Note: The performance evaluation document has now been re-opened.

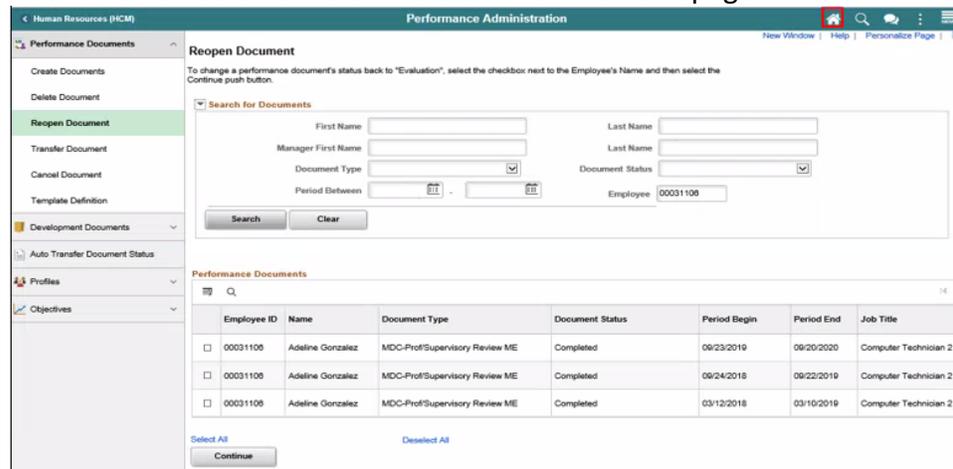
8. Earlier, the search returned four Evaluations. Note that only three Evaluations now display a **Document Status** of “Completed”.



Lesson 1: Administrative Task

Lecture 4:
Administrative
Task – Re-
Open
Performance
Evaluation
Documents

9. Select the **Home** button to return to the INFORMS homepage.

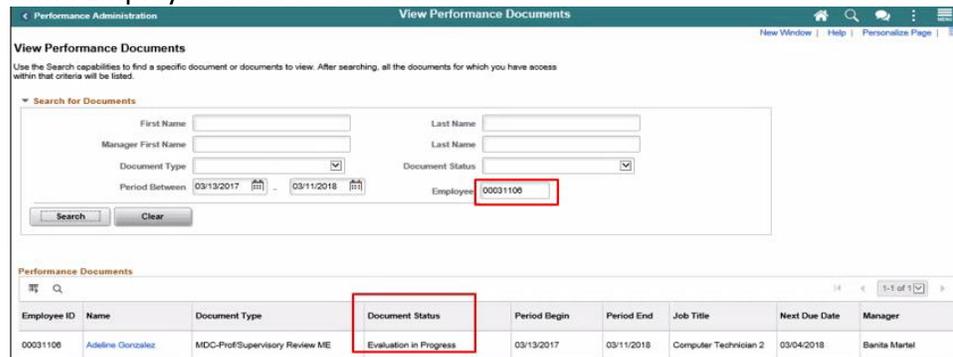


The DPR has re-opened a performance evaluation document.

Note: Use the following navigation to validate whether the desired Evaluation has been re-opened:

Nav bar > Navigator button > Human Resources (HCM) > Workforce Development > Performance Management menu > Performance Documents menu > View Documents

Use Search Criteria to find open Performance Evaluations documents for the same Employee entered earlier.



Validate that the evaluation document displays a **Document Status** of “Evaluation In Progress”.

Note: A **Document Status** of “Evaluation In Progress” means that the performance evaluation document is open. The DPR has validated that the performance evaluation document has been re-opened.

Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario A DPR manually generates a Performance Evaluation Document for an Employee in their Business Unit.

Instructions This activity is to be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools. There are Instructors in the room to assist if you have questions.

Lesson 1: Training Exercise

Debrief



1. Who can create Performance Evaluation documents?
 - a) Managers
 - b) Reviewers
 - c) DPRs

2. Can a DPR create a Performance Improvement Plan?

Lesson 1: Lesson Summary

Lesson Summary



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

- Create Performance Evaluation Documents
- Cancel Performance Evaluation Documents
- Transfer Performance Evaluation Documents
- Re-Open Performance Evaluation Documents

Lesson 2: Completing Evaluation

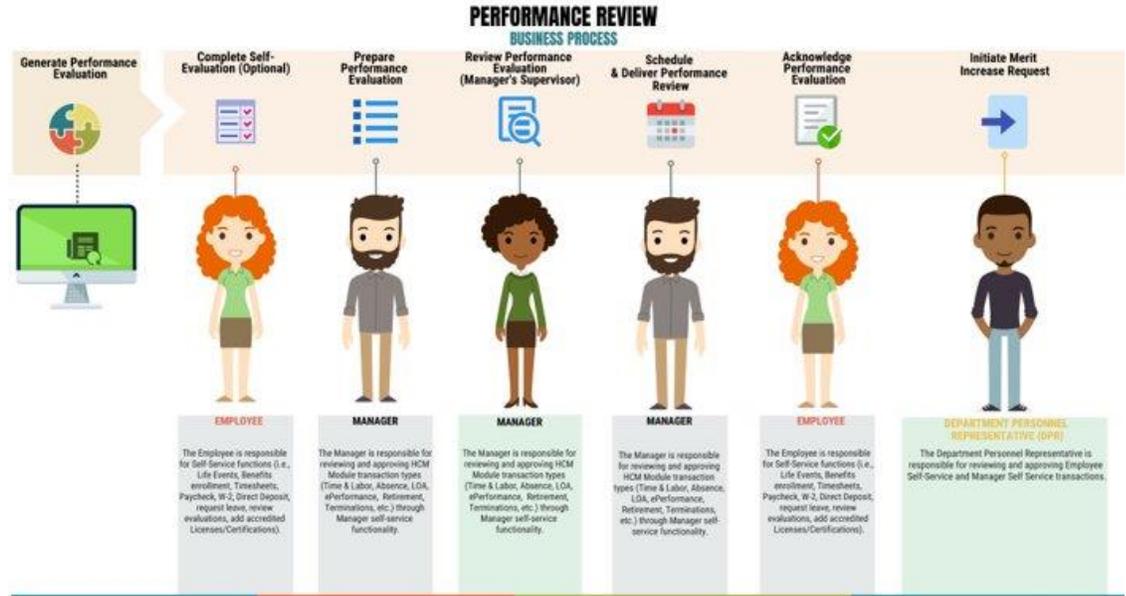
Lesson 2: Overview

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

- Complete a Performance Evaluation as a DPR

Lesson 2: Completing Evaluation

Lesson 2: Introduction



This lesson will review Completing an Evaluation as a DPR.

Managers, Reviewers, Employees and Department Personnel Representatives (DPRs) use INFORMS for performance administration. Managers use INFORMS' Manager Self Service tile to develop, approve and deliver Performance Evaluations to Employees. Reviewers navigate to their Worklist to approve Performance Evaluations. Employees use INFORMS' Employee Self Service tile to perform self-evaluations (optional) and acknowledge Performance Evaluations. DPRs use INFORMS to generate Performance documents, address administrative tasks as needed, and initiate Merit Increases when applicable.

Lesson 2: Completing Evaluation

Key Terms



The following key terms are used in this module:

Term	Definition
Merit Increase	A base salary increase that Employees may be eligible for if their Overall Rating is “Satisfactory” (or above) based on their salary plan.
Overall Rating	The average of the Individual Ratings on an Employee’s performance evaluation.
Performance Evaluation	An annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for the employee performance based <i>Merit Increase</i> .

Lesson 2: Completing Evaluation

Lecture 1: Completing Evaluation (DPR)

Initiate a Merit Increase (DPR)

While preparing their Evaluation, the Manager rates their Employee's performance in individual Rating Categories according to the following scale:

- Unsatisfactory
- Needs Improvement
- Satisfactory
- Above Satisfactory
- Outstanding
- Does not apply

The overall rating is an average of the individual ratings.

The Employee may be eligible for a Merit Increase if the Employee's overall Performance Evaluation Score is "Satisfactory" or above.

INFORMS routes a Performance Evaluation completion notification to the DPR. The DPR responds to the notification by reviewing the Employee's record to see whether the Employee is eligible for a merit increase.

While initiating the Employee's Merit Increase process in INFORMS, the DPR will perform the following:

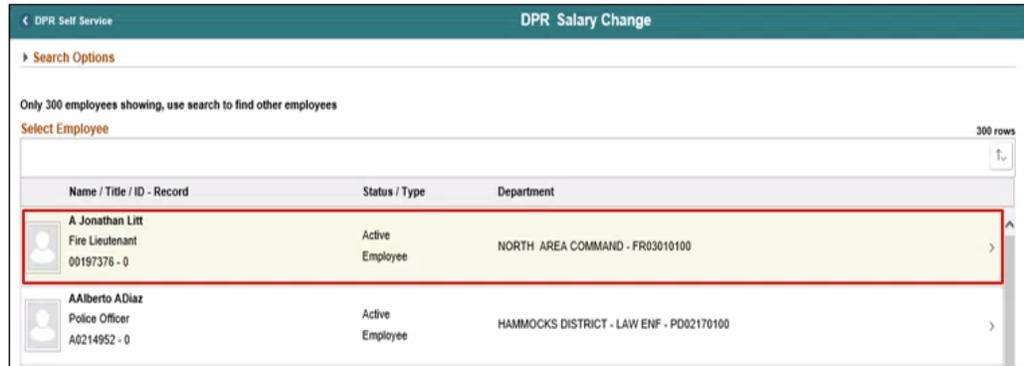
- Validate the Employee's merit eligibility based upon the salary plan that corresponds to the Employee's Job Code.
- Change the Employee's salary using the DPR salary change tool to move to the next pay step, add/remove components of pay, and increase by percentage the Employee's base salary through workflow approval and attachment functionality if applicable.

If employees are on a stepped salary plan the DPR will navigate to the lower portion of the page and select the new salary step from the drop down. Then they click on the calculate compensation button to refresh the employee's new base salary rate.

Lesson 2: Completing Evaluation

Lecture 1: Completing Evaluation
Navigation: HOME > DPR Self Service > DPR Salary Change

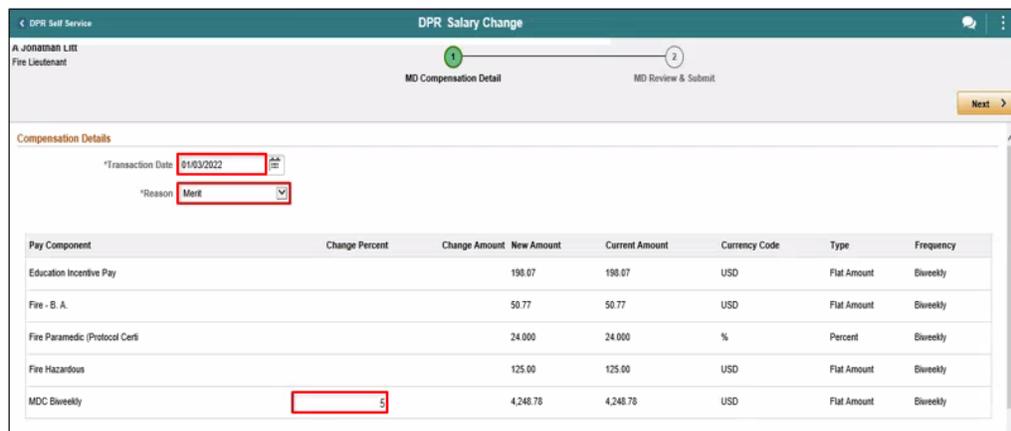
1. Select the **Row** for the desired Employee.



2. Validate the **Transaction Date** of the salary increase request.
3. Select the **Merit** list item in the **Reason** list.
4. Enter the desired percentage into the **Change Percent** field.

Note: Enter a whole number for a percent (e.g. if the DPR is entering a five percent merit increase, enter “5”).

5. Press the “Tab” key on the keyboard to refresh the compensation calculations.



Note: If the Employee were on a stepped salary plan, the DPR would navigate to the lower portion of the page and select the new salary step from the drop down and then click the **Calculate Compensation** button to refresh the Employee’s new base salary rate.

Lesson 2: Completing Evaluation

- Lecture 1: Completing Evaluation**
- If necessary, scroll down to view the **Calculate Compensation** button.
 - 6. Select the **Calculate Compensation** button.
 - 7. Select the **Next** button.

Salary Plan

Salary Admin Plan: STEP Step

Salary Grade: 345 345

Grade Entry Date: 09/27/2006

Step: 11

Step Entry Date: 02/19/2021

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
CRDV2	0	18.46%	USD	B		
FDLE	0	184.27%	USD	B	5.500	MDCMAX
FRPBA	0	167.52%	USD	B	5.600	MDCMAX
MDBKLY	0	3,058.50%	USD	B		
NGT2	0	291.84%	USD	B		

Calculate Compensation

- 8. Enter a comment in the **Comments** field.
- 9. Select the **Submit** button.

Review and Submit

Transaction Date: 01/03/2022

Reason: Merit

	New Information	Current Information
Biweekly Salary	3,720.59 USD	3,558.65 USD
Annual Rate	96,735.31 USD	92,550.99 USD

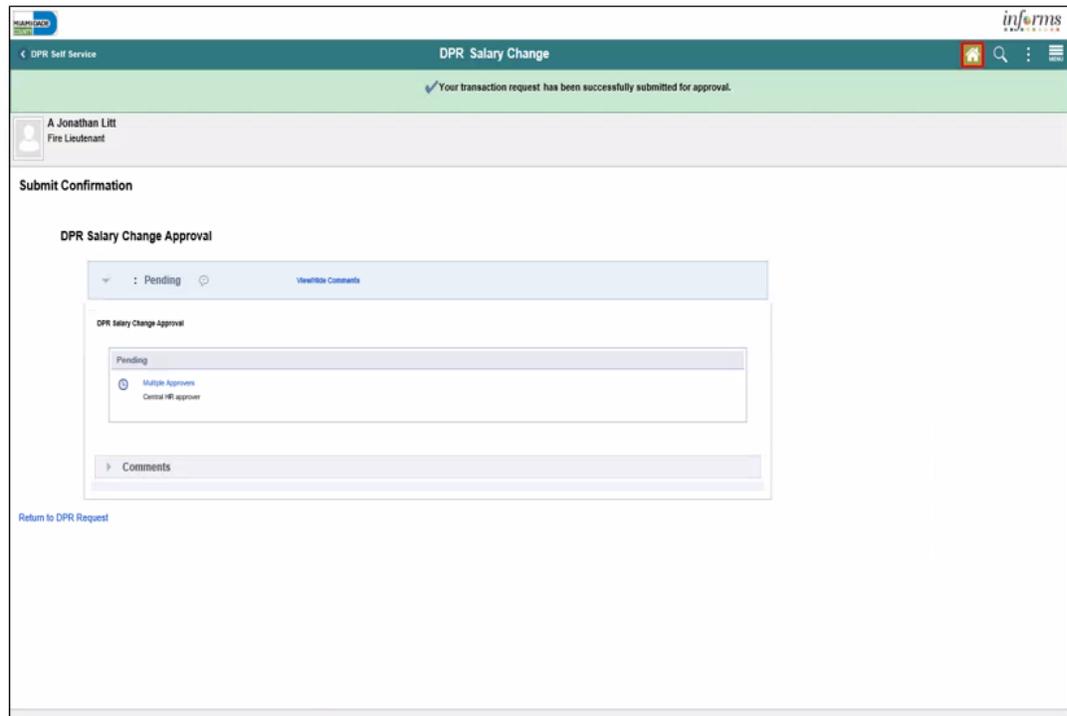
Comments

This Employee has acknowledged their performance review document. The Employee qualifies for a Merit increase.

Lesson 2: Completing Evaluation

Lecture 1: Completing Evaluation The DPR has submitted the Employee’s Merit Increase request. Central HR receives a notification and reviews the Salary Change request. Once Central HR approves and processes the merit increase request, the DPR will receive a confirmation notification that the Employee’s Salary Change is complete.

10. Select the **Home** button to return to the INFORMS home page.



Lesson 2: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario INFORMS has notified you that an Employee's performance review has been completed and you have determined that the Employee is eligible for a Merit Increase. Log into INFORMS as a DPR in the Employee's Business Unit and initiate a 5% Merit Increase request for the Employee.

Instructions This activity will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 2: Training Exercise

Debrief



1. (True or False) An Employees with one Individual Rating of “Needs Improvement” is eligible for a Merit Increase if their Overall Rating is above “Satisfactory”.

2. (True or False) The Comments Field is used for special instructions for Central HR.

Lesson 2: Completing Evaluation

Lesson Summary

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

- Complete a Performance Evaluation as a DPR



Lesson 3: Reports and Queries

Lesson 3: Overview

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

- Understand the list of Reports:
 - **RPT-HR-479:** Late Evaluations
 - **RPT-HR-604:** Performance Evaluation Completed for Merit Increase Due

Lesson 3: Reports and Queries

Key Terms



The following key terms are used in this Lesson.

Term	Definition
N/A	N/A

Lesson 3: Reports and Queries

Lecture 1: Reports and Queries

The following is a list of reports available for Department Personnel Representative (DPR) to use in INFORMS. DPRs can view the HR Fundamentals course to review detail instructions on how to process these reports in INFORMS.

Report Name	Report Description
RPT-HR-479: Late Evaluations	This report documents employee performance evaluation information including days evaluation is overdue.
RPT-HR-604: Performance Evaluation Completed for Merit Increase Due	This reports documents performance evaluation completion data to help DPRs determine if a merit increase is appropriate.

Lesson 3: Lesson Summary

Objectives Achieved



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

- Understand the list of Reports:
 - **RPT-HR-479:** Late Evaluations
 - **RPT-HR-604:** Performance Evaluation Completed for Merit Increase Due

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the ePerformance course. You now should be able to:

1. Perform Administrative Tasks
2. Complete Performance Evaluations
3. Understand INFORMS Performance Report and Query capabilities

Next Steps

Now that you have completed the course, please make sure to complete the following tasks:

1. Course assessment (tests your knowledge of the content)
2. Course evaluation (collects course feedback)
3. Log off your workstation

Reference Materials

Reference Materials



If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits

1. Manually Create a Performance Evaluation Document
2. Reopen a Performance Evaluation Document
3. Cancel a Performance Evaluation Document
4. Transfer a Performance Evaluation Document
5. Initiate a Merit Increase
6. Run Performance Reports

Reference Materials

Reference Materials

For additional Information:
www.miamidade.gov/informs



Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
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 varies based upon which Employee will be reviewed: MDC SR. MANAGEMENT MX (for Management Evaluation), MDC-Annual Review EE (for Employee Evaluation), or MDC-Prof/Supervisory Review ME (for Senior Manager Evaluation).
Merit Increase	A base salary increase that Employees may be eligible for if their Overall Rating is “Satisfactory” (or above) based on their salary plan.
Overall Rating	The average of the Individual Ratings on an Employee’s performance evaluation.
Performance Evaluation	An annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for the employee performance based <i>Merit</i> Increase.