Miami-Dade County



End-User Training Guide

Course Code: DPR 301

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

	Course Overview
Course	This course provides a comprehensive review of the ePerformance Management.
Description	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	Participants can attend the other related courses to Departmental HR:
Courses	 DPR 302 – Departmental HR - Personnel Changes DPR 202 – 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



Table of Contents

Content

Module 1: Course Introduction	4
Module 2: ePerformance Management	
Lesson 1: Administrative Task	
Lesson 2: Completing Evaluation	
Lesson 3: Reports and Queries	
Module 3: Course Summary	



Topics

• Course Administration and Logistics

This module covers the following topics:

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



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



Course Learning At the conclusion of this course, participants will be able to:

- Objectives
- Perform Administrative Tasks
- Complete a Performance Evaluation as a DPR
- Understand Performance Reports and Queries



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

Roles and
ResponsibilitiesDepartment Personnel Representative (DPR): The Department Personnel
Representative is responsible for reviewing and approving Employee Self-Service and
Manager Self Service transactions.



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.



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 rekeying, 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
	 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



The End-to-End Human Capital Management **Business** U Process BUSINESS INTELLIGENCE SCORECARD
 Manager Self Service Capabilities
 Employee Self Service Capabilities

 • Approval of Timesheet and Absence Request • Performance management • Termination
 • Update Demographic Data • Direct Deposit • Update W4 Tax Data • View Poycheck
 • Benefits Enrollment • Timesheet Entry • Absence Request
 rofile Managemen Accounts Payable and General Ledger Benefits Administration Absence Management I Project Costing BUDGETING Recruiting-Time and Labor Payroll ePerformance Position Management Enterprise Learning Management Human Resources Personal Data • Job Data • Compensation • Discipline • Profile Manag L WASD/MDAD Financials Department Applications INFORMS Financials External Partners Documentum



Introduction toUsers will take part in three types of hands-on learning throughout this course:DemonstrationsInstructor Demonstrations, Training Activities, and Training Exercises- The definitionsand Exercisesand 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:The following key concepts were covered in this module:CourseThe End-to-End Process of Performance Evaluation AdministrationIntroductionLearning 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 This module includes the following lessons: Module 2: Module Introduction ePerformance Lesson 1: Administrative Tasks Management

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

- Overview
- 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 HCMePerformance 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.





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.



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.



Lecture 1:At the conclusion of this lesson, you will be able to:AdministrativeCreate Performance DocumentsTasks (ManuallyCancel Performance Evaluation DocumentsCreateTransfer Performance Evaluation DocumentsEvaluation)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 HCMePerformance 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.



Lecture 1: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.(Manually
Create
Evaluation)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.

	Performance Administration
Create Documents	
Find an Existing Value	Add a New Value
Run Control ID 2022eval	
Add	

- 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.

 Human Resources (HCM) 	Performance Administration	1 Q 🔍	: .
Performance Documents	Create Documents	Help Personali	te Page 🗐
Create Documents			
Delete Document	Run Control ID 2022eval Report Manager Process Monitor Run		
Reopen Document	Run Request Parameters		
Transfer Document	Period Begin Date 03/01/2022		
Cancel Document	Document Type 🔽 Template ID 🖂		
Template Definition	Manager Selection Method		
📕 Development Documents 🛛 🗸			
Auto Transfer Document Status	Create Documents Using		
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	Employee Groups to Process III Q < (11 of 100 > >	View All	
	*Group ID As Of Date Description Language Code		
	1 03/20/2022 11	+ -	
	Save Notity Add	Update/Display	

Lecture 1:

Evaluation)

e Tasks (Manually Create

Administrativ



Lesson 1: Administrative Task

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.

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Performance Documents	Create Documents			New Wind	low Help Persona
Create Documents					
Delete Document	Run Control ID 2022eval	Rep	ort Manager Process Mon	Run	
Reopen Document	Run Request Parameters				
Transfer Document	Period Begin Date	03/01/2022	Period End Date 03	01/2023	
Cancel Document	Document Type	MDC Performance Improvement Pt	Template ID	9	
Template Definition	Manager Selection Method	MDC SR MGT SA 2 MDC SR, MANAGEMENT MX MDC-Annual Review EE			
Development Documents		MDC-Prof/Supervisory Review ME MDC-Sr. Mgmt. Prof. SA Performance Document	7		
Auto Transfer Document Status	Create Documents Using		_		
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Objectives					
	Employee Groups to Process 野 Q			- Fit of t 🔄 💧	/ View All
	*Group ID	As Of Date	Description	Language Code	



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.

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Create Documents								
Delete Document	Run Control ID. 2022eval	Repo	rt Manager Process	Nonitor Run	<u>،</u>			
Reopen Document	Run Request Parameters							
Transfer Document	Period Begin Date 03/01/202	2 📖	Period End Date	03/01/2023				
Cancel Document	Document Type MDC-Ann	ual Review EE] Template ID	Emprovee Performance Eval				
Template Definition	Manager Selection Method	5	1		-			
📕 Development Documents 🛛 🗸								
Auto Transfer Document Status	Create Documents Using							
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Lesson 1: Administrative Task 8. Select the Manager list and select By Part Posn Mgmt Supervisor. Lecture 1: 🐐 ų 💌 : 💻 Administrative Create Documents Run Control ID 2022eva Report Manage Run Tasks Delete Document Run Request Parameters (Manually Period Begin Date 03/01/2022 Period End Date 03/01/2023 Document Type MDC-Annual Review EE ance Eval ~ Template ID Employee Perform Create **Evaluation**) Create 0

- 9. Select the Employee ID option.
- 10. Select the Empl ID field, then enter the Employee's ID.

· Group ID

11. Select the **Save** button.

< Human Resources (HCM)		Performance Administration	n		a Q	2 :
Performance Documents	Create Documents			New Window	Help Pers	onalize Page
Create Documents	oreate bootanients					
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Reopen Document	Run Request Parameters					
Transfer Document	Period Begin Date	03/01/2022	Period End Date 03/01/2023			
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13. Select the **OK** button.

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Time Zone	Q						
Process List							
Select Descript	tion	Process Name	Process Type	 Type 	-Format	Distribution	
Mass Cr	eate Employee Documents	EP_MGRDOC	Application Engine	Web 🔽	TXT 💌	Distribution	
ок	Cancel						



Lecture 1: Administrative Tasks (Manually Create Evaluation)	14.Note	e the Process I	nsta	nce numb	er, then	select t	he Proce	ess Monitor	link	
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15. Recall the **Process Instance** number in order to identify the correct row.

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	297308		Application Engine	EP_MGRDOC	T0140635	03/20/2022 6:42:45PM EDT	Success	N/A	Details



Lecture 1: 16. Select the **Refresh** button.

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

- Tasks (Manually
- Create
- Evaluation)



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

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Human Resources (HCM)	10			Perform	nance Administra	tion		1	1 Q 🐟	:
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	Proces	a List Serve	r List							

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



Lecture 1: Administrative	After generating a performance evaluation manually, the DPR may validate their results as follows:
(Manually Create Evaluation)	 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.



Lecture 2:From time to time, PerformaAdministrativeINFORMS. As with all PerformTask - CancelAdministrative task must bePerformanceNavigation: Human ResourceEvaluationDocuments > Cancel Documents

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.

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Reopen Document	Farst Name	
Transfer Document	Manager First Name MICHAEL Last Name KRUG	
Cancel Document	Document Type Document Status	
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Development Documents	Search Clear	
11 Auto Transfer Document Status		
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Conjectives		

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

< Human Resources (HCM)				Perform	nance Administration	n			a q 🝚
A Performance Documenta		00183225	Leyta Caeranza	MDC-Prof/Supervisory Review ME	Completed	02/08/2010	02/06/2011	Erp Senior Developer	Michael Krug
Create Documents	0	00139131	Lita Lapierre	MDC-Prof/Supervisory Review ME	Completed	04/08/2019	04/05/2020	Erp Business Analyst 3	Lavonda Holloman
Delete Document		00158005	Manimie Gilmer	MDC-Prof/Supervisory Review ME	Completent	09/23/2019	09/20/2020	Erp Business Analyst 3	Lavonda Holioman
Reopen Document		00317219	Mariela Stotts	MDC-Prof/Supervisory Review ME	Completed	07/01/2019	06/28/2020	Accountant 3	Lavonda Holloman
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Objectives ~		00079738	Nea Paulsen	MDC-Prof Supervisory Review ML	Completed	12/16/2019	12/13/25/20	Erp Business Analysi 3	Lavonda Hotoman
		00323923	Paloma Coppola	MDC-Prof/Supervisory Review ME	Completed	07/01/2019	06/28/2020	Administrative Officer 2	Lavonda Holloman
	0	00016302	Pasla Strange	MDC-Prof/Supervisory Review ME	Completed	09/10/2018	09/08/2019	Assistant Tax Collector	Lavonda Holloman
		00016302	Pasla Strange	MDC-Prof/Supervisory Review ME	Completed	09/11/2017	09/09/2018	Assistant Tax Collector	Lavonda Holloman
		00016302	Paola Strange	MDC-Prof/Supervisory Review ME	Completed	09/12/2016	09/10/2017	Assistant Tax Collector	Lavonda Holloman
		00323913	Sasha Osborn	MDC-Prof/Supervisory Review ME	Completed	07/15/2019	07/12/2020	Administrative Officer 2	Lavonda Holloman
		00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Itd Enterprise Portfolio Mgr	Lavonda Holloman
		00211062	Tran Samples	MDC-Prol/Supervisory Review ME	Completed	12/18/2017	12/16/2018	Itd Enterprise Portfolio Mgr	Lavonda Holloman
		00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	12/19/2016	12/17/2017	Ind Enterprise Portfolio Mgr	Lavonda Holloman
		00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	12/21/2015	12/18/2016	Itd Enterprise Portfolio Mgr	Lavonda Holloman
		00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	06/01/2010	05/31/2011	Itd Enterprise Portfolio Mgr	Michael Krug
		00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	05/20/2019	05/17/2020	Erp Project Manager	Lavonda Holloman
	0	00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	11/01/2010	10/30/2011	Erp Project Manager	Michael Krug
		00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	11/02/2009	10/31/2010	Erp Project Manager	Michael Krug
	Select	Al Continue		Develoci All					



Lecture 2:	F
Administrative	Ċ
Task - Cancel	
Performance	
Evaluation	
Documents	

6. Select the **Save** button.

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Transfer Document	Employee ID	Name	Document Type	Document Statue	Period Begin	Period End	Job Tibe	Manager		
Cancel Document	00015270	Bady Jamieson	MDC-Prof/Supervisory Review ME	Completed	11/16/2009	11/14/2010	Erp Senior Developer	Michael Knug		
Template Definition	You have chose To confirm this	en to cancel the perfe cancellation, select t	ormance documents listed. he \$8V# button.							
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7. Select the **OK** button.

Human Resources (HCM)	Performance Administration	🐐 Q 🐋 : 🗮
😤 Performance Documente 🔗	Cancel Document	New Window Help Personalize Page 🔯
Create Documents	Save Confirmation	
Delete Document	The Bave was successful.	
Reopen Document	ОК	
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Cancel Document		
Template Definition		
🗊 Development Documents 🗸 🗸		
📑 Auto Transfer Document Status		
🙀 Profiles 🗸 🗸		
2 Objectives		

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

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a Performance Documenta	Can	cel Documer	nt					New Window	Help Personalize Page
Create Documents	To ca cance	ncel a performance led except for alre	e document, select the ady "Canceled" perfor	checkbox for the Employee and then select mance documents.	the Continue push button. All	documents can be			
Delete Dottenere	-	Search for Doou	iments						
Reopen Document			First Name		Lost Name				
Transfer Document			fanager Firet Name	MICHAEL	Last Name	KRUG			
Cancel Document	1		Document Type		Document Status		1		
Template Definition			Period Between	E. E	Employee				
Development Documents	- [Search	Clear						
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	Per	formance Docur	ments						
Protes	- P	e 0,						- H -	(1-30 of 30 ♥ → →
Objectives	~	Employee ID	Name	Document Type	Document Statue	Period Begin	Period End	Job Title	Manager
	0	00021406	Alyson Sandstrom	MDC-Prof/Supervisory Review ME	Completed	03/07/2011	03/04/2012	Erp Security Administrator 2	Michael Krug
		1							

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.



Lecture 3:
Administrative
Task –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.Transfer
Performance
Evaluation
DocumentsNavigation: Human Resource (HCM) > Performance Administration > Performance
DocumentThere 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.

< Human Resources (HCM)			Performance.	Admir	nistration			-	q ·	4 1	
Performance Documents Create Documents	~	Transfer Document To transfer a performance document, select the ob-	ckbox for the Employee and then t	elect th	e Continue push button.		New Window	Help	Person	alize Pag	he [s
Transfer Document Cancel Document Document Document	2	First Name Manager First Name Document Type Period Between	☑ 簡.	m)	Last Name Last Name Document Status Employee	Acknowledged Approval Canceled					
4 Profiles	×	Search Clear				Completed Define Criteria Evaluation in Propress Nort Starred Pending Acknowledgement Shared with Employee Track Progress					

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

			Ferrorina	ance Auministration					
							New Window	Help P	ersonalize Pa
15	fer Docum	ent							
15	fer a performant	ce document, select th	e checkbox for the Employee an	id then select the Continue push button.					
Se.	arch for Docu	iments							
		First Name		Last Nam	e				
		lanager First Name		Last Nam	e				
		Document Type		Document Statu	s Evaluation in Pro	gress 💌]		
		Period Between	II .	Employee					
	Search	Clear							
for	mance Docur Q	nents	Document Type	Document Status	Pariod Baoin	Period Fod	Job Title	A A	1-2 of 2♥
or	mance Docur Q Employee ID	nents	Document Type	Document Status	Period Begin	Period End	Job Title	4 4 Mana	1-2 of 2 ♥ ger
or	Caracter Docur Q Employee ID 00017901	Name Devaughn Liang	Document Type MDC-Annual Review EE	Document Status Evaluation in Progress	Period Begin 07/01/2018	Period End 07/01/2022	Job Title Director, Human Resources Dept	4 4 Mana Christ	1-2 of 2 V ger ina Kocher
or	Q. Employee ID 00017901 00319258	Name Devaughn Liang Les Chatham	Document Type MDC-Annual Review EE MDC-Annual Review EE	Document Status Evaluation in Progress Evaluation in Progress	Period Begin 07/01/2016 01/01/2021	Period End 07/01/2022 01/01/2022	Job Title Director, Human Resources Dept Accountant 2	Mana Christ	1-2 of 2 ger ina Kocher i Brockway



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

Lecture 3: Administrative Task – Transfer Performance Evaluation Documents Net Kt, transfer Tesponisionity to a during Select the Select a Manager link Transfer Counters Performance Counters Performance Evaluation Documents Net Account Counters Performance Counters Net Kauge Counters

< Human Resources (HCM)			Pi	erformance Administrati	on			👘 Q 🔍 🗄
A Performance Documents	Transfer De	ocument					New W	Indow Help Personalize Pa
Create Documents	Confirm Tr	ransfer						
Reopen Document	Performance	Documents						
Transfer Document	□7 Q							4 4 1-1 of 1 🗹 🕨 🕽
Cancel Document	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
Development Documents	00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Christina Kocher
M Profiles	 You have chos Select the rece 	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 Mar	nager ID: perceta Manaser					
	Save	Return to	Previous Page					

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

Person Search	
	He
5	
STOCKER	
	STOCKER



Lecture 3: Administrative	10. Select the Kilvondr 11. Select the OK butt [,]	a Stocker option . on.	
Task –		Person Search	×
Transfer			Help
Performance	Select a Manager		
Evaluation	Search Criteria and Resul Instructions	its	
Documents	Search Criteria		
	Name		
	Last Name	STOCKER	
	Second Last Name		
	First Name		
	ACName		
	Search		
	Search Results		
	O Domitila Sto	ocker	0

12. Select the **Save** button.

< Human Resources (HCM)				- Pe	Performance Administration					
LA Performance Documents		Transfer Do	ocument					New V	Andow Help Personalize Page	
Create Documents Confirm Transfer										
Reopen Document	eopen Document Performance Documents									
Transfer Document		m, Q	4 4 1-1 of 1 (v) > >1							
Cancel Document		Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	
U Development Documents	¥	00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Christina Kocher	
🙀 Profiles	÷	You have chose Select the rece	en to transfer the door iving manager by usin Now Ma	ment indicated to another mana g the "Select a Manager" hyperi namer ID: Kilwoodra Stocker	ger. nk, then select the Save button to	complete the transfer.				
		Save	Return to	Select a Managet						



Lecture 3: Administrative

Performance Evaluation Documents

Task –

Transfer

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.

< Human Resources (HCM)	Performance Administration	1	*	Q 🔍	. :	
👍 Performance Documents 🔷 🗠	Transfer Document	ndow	Help	Person	alize Pag	1.1
Create Documents	Save Confirmation					
Reopen Document	The Save was successful.					
Transfer Document	ок					
Cancel Document						
Development Documents ~						
Profiles						

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.

C manual interesting the start				Perform	ance Administration				- I - I		
C± Performance Documents	Tra	nsfer Docum	ent					New Window	Help]	Personalize Pa	iĝe [
Create Documents	To tra	nsfer a performan	ce document, select the	a checkbox for the Employee an	d then select the Continue push t	sutton.					
Reopen Document		Search for Docu	uments								
Transfer Document			First Name		Las	Name					
			Manager First Name		Lasi	Name		1			
Canoei Document			Document Type		Document	Status Evaluation in Pr	ogress 🕑				
II Development Documents	~		Period Between	m),	Emr.	lovee					
4 Profiles	0 7		1								
	Per	formance Docu	ments								
	-	≡ Q									
									4.4	1-2 of 2	
		Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Man	1-2 of 2	
	C	Employee ID 3 00017901	Name Devaughn Liang	Document Type MDC-Annual Review EE	Document Status Evaluation in Progress	Period Begin 07/01/2016	Period End 07/01/2022	Job Title Director, Human Resources Dept	Man	1-2 of 2 ⊡ ager Indra Stocker	
	C	Employee ID 00017901 000319258	Name Devaughn Liang Les Chatham	Document Type MDC-Annual Review EE MDC-Annual Review EE	Document Status Evaluation in Progress Evaluation in Progress	Period Begin 07/01/2016 01/01/2021	Period End 07/01/2022 01/01/2022	Job Title Director, Human Resources Dept Accountant 2	Man Kilw Noe	1-2 of 2 🖂 ager andra Stocker mi Brockway	
	E	Employee ID 00017901 000319258 t All	Name Devaughn Liang Les Chatham	Document Type MDC-Annual Review EE MDC-Annual Review EE Deselect All	Document Status Evaluation in Progress Evaluation in Progress	Period Begin 07/01/2016 01/01/2021	Period End 07/01/2022 01/01/2022	Job Title Director, Human Resources Dept Accountant 2	Man Kilw Noe	1-2 of 2 🕑 iager Indra Stocker mi Brockway	

15. Select the Home button.

			Perform	ance Administration				0	. 2	: -
	Transfer Docum	ent					New Window	Help	Personalize	Page
	To transfer a performan	ce document, select th	e checkbox for the Employee ar	nd then select the Continue push button						
	 Search for Docu 	ments								
		First Name		Last Nam	e .					
		Aanager First Name		Last Nam	e .		3			
		Document Type		Document Statu	s Evaluation in Pro	ogress 🖂]			
~		Period Between		Employe	0					
*	Search	Clear								
	Performance Docur	nents	ints.							
	≡ Q							4 4	1-2 of 2	9 ×
	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Man	ager	
	00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Kilve	ndra Stocks	Br .
	00319258	Les Chatham	MDC-Annual Review EE	Evaluation in Progress	01/01/2021	01/01/2022	Accountant 2	Noe	mi Brockway	r
	Select All		Deselect All							
	Continue									
	*	Transfer Docum To transfer a performance Search for Docu Search								

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



Lecture 4:
Administrative
Task – Re-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.OpenNavigation: Human Resource (HCM) > Performance Administration > Performance
Documents > Reopen DocumentsEvaluation
DocumentsDocuments 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.

< Human Resources (HCM)	Performance Administ	🖌 Q 🔍 : 🎚	
Performance Documents ^ Create Documents Delete Document	Reopen Document To darge a participant document's status back to "Evaluation", select the checkbox ne continue push buttor. * Search for Documents	New Wir	idow Help Personalize Page
Reopen Document	First Name	Last Name	
Transfer Document	Manager First Name	Last Name	
Cancel Document	Document Type	Document Status	~
Template Definition	Period Between	Employee 00031108	
Development Documents ~	Search Clear		
Auto Transfer Document Status			
🏰 Profiles 🗸 🗸			
🖉 Objectives 🗸 🗸			

- 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.

< Human Resources (HCM)					Performance Administ	ation		*	्र 🔉 : 📰
Serformance Documents	^	Reop	en Docume	nt			Ne	w Window Help	Personalize Page 📰
Create Documents		To char Continu	nge a performans e push button.	e document's status b	ack to "Evaluation", select the checkbox ne	of to the Employee's Name and	then select the		
Delete Document		• Se	earch for Docu						
Reopen Document				First Name		Last Name			
Transfer Document			ħ	tanager First Name		Last Name			
Cancel Document				Document Type	V	Document Status		~	
Template Definition				Period Between	. .	Employee	00031108		
E Development Documents	~		Search	Clear					
Auto Transfer Document Status									
V Profiles	~	Perfo	rmance Docur	nents					
Cibjectives	~		Constants ID	Manag	Descend Tree	Description of the law	Period Perio	Desired Fred	Int. The
			Employee ID	Name	Document Type	Document status	Period begin	Period End	Job Tibe
			00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Computer Technician 2
			00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Computer Technician 2
			00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/12/2018	03/10/2019	Computer Technician 2
		۰	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/13/2017	03/11/2018	Computer Technician 2
		Select	All Continue		Deselect All				



Lesson 1: Administrative Task 7. Select the **OK** button. Lecture 4: Performance Administration 希 Q 🗣 : Administrativ Reopen Document Save Confirmation ata Dao ments e Task – Re-The Save was successful Open ок Performance el Doc Template Definition **Evaluation Documents**

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".

< Human Resources (HCM)			Performance Administration				् 🔉 : 🚍						
Ca Performance Documents	Reopen Docum	ent			Nei	w Window Help) Personalize Page 🔝						
Create Documents	To change a performan Continue push button.	ce document's status b	ack to "Evaluation", select the checkbox ner	t to the Employee's Name an	nd then select the								
Delete Document	Search for Doc	learch for Documents											
Reopen Document		First Name		Last Name									
Transfer Document		Manager First Name		Last Name									
Cancel Document		Document Type	Y	Document Status		¥							
Template Definition		Period Between	E. E	Employee	00031108								
Development Documents ~	Search	Clear											
Auto Transfer Document Status													
No Profiles V	Performance Docu	ments					14						
🔀 Objectives 🗸 🗸							1.1.894						
	Employee ID	Name	Document Type	Document status	Penod Begin	Period End	Job little						
	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Computer Technician 2						
	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Computer Technician 2						
	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/12/2018	03/10/2019	Computer Technician 2						
	Select All Continue		Deselect All										



	9.	Select the Ho	me l	button	to retu	rn to the INF	ORMS hom	epage.		
Lecture 4:		< Human Resources (HCM)				Performance Administ	ration			् 🤉 : 🗮
Administrative		Cs Performance Documents	^	Reopen Docu	nent			Ne	w Window Help	Personalize Page
, la		Create Documents		To change a perform Continue push butto	ance document's status I	back to "Evaluation", select the checkbox n	ext to the Employee's Name and the	n select the		
Task – Re-		Delete Document		Search for D	ocuments					
		Reopen Document			First Name		Last Name			
Open		Transfer Document			Manager First Name		Last Name			
Deuteuropeo		Cancel Document			Document Type	¥	Document Status		~	
Performance		Template Definition			Period Between		E Employee 000	31108		
Evaluation		Unevelopment Documents	~	Search	Clear)				
Evaluation		Auto Transfer Document S	atus							
Documents		No Profiles	~	Performance Do	cuments					
		Cbiectives	~	m) Q						н
				Employee	ID Name	Document Type	Document Status	Period Begin	Period End	Job Title
				00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Computer Technician 2
				00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Computer Technician 2
				00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/12/2018	03/10/2019	Computer Technician 2

Contin

Lesson 1: Administrative Task

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.

< Performance	se Administration		View Performant	ce Documents			a (2 🔍 🗄	
fiew Perform se the Search of ithin that criteria	mance Documents apabilities to find a specific will be listed.	document or documents to view. After sea	rching, all the documents for which	you have access		Ne	w Window Help	Personalize Pa	ie
Search for	Documents								
	First Name		Last Name						
	Manager First Name		Last Name						
	Document Type	×	Document Status		V				
	Period Between	03/13/2017 📾 _ 03/11/2018 🕅	Employee 00	0031108					
Search	Clear	1							
erformance l	Documents								
117 Q							H	< 1-1 of 1	
Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager	
00031106	Adeline Gonzelez	MDC-Prof/Supervisory Review ME	Evaluation in Progress	03/13/2017	03/11/2018	Computer Technician 2	03/04/2018	Benita Martel	

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
- \checkmark

•

- Transfer Performance Evaluation Documents
- Re-Open Performance Evaluation Documents

Cancel Performance Evaluation Documents



Lesson 2: Completing EvaluationLesson 2:At the conclusion of this lesson, you will be able to:Overview• Complete a Performance Evaluation as a DPR





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.



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</i> Increase.



Lecture 1: Initiate a Merit Increase (DPR)

Completing Evaluation (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.



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

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

¢ DPR	Self Service		DPR Salary Change	
Sear	ch Options			
Only 30	0 employees showing, use search to find other employees			
Select	Employee			300 rows
				t₀.
	Name / Title / ID - Record	Status / Type	Department	
8	A Jonathan Litt Fire Lieutenant 00197376 - 0	Active Employee	NORTH AREA COMMAND - FR03010100	→ [^]
2	Alberto Abiaz Police Officer A0/214952 - 0	Active Employee	HAMMOCKS DISTRICT - LAW ENF - PD02170100	>

- 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.

COPR Self Service	DF	R Salary Change					8 E
A Jonathan Litt Fire Lieutenant	MD Co	1 mpensation Detail	2 MD Review & Su	bmit		_	
							Next >
Compensation Details							^
*Transaction Date 01/03/2022 *Reason Merit	祖						
Pay Component	Change Percent	Change Amount New Amount	Current Amount	Currency Code	Туре	Frequency	
Education Incentive Pay		198.07	198.07	USD	Flat Amount	Biweekly	
Fire - B. A.		50.77	50.77	USD	Flat Amount	Biweekly	
Fire Paramedic (Protocol Certi		24.000	24.000	%	Percent	Eiweekty	
Fire Hazardous		125.00	125.00	USD	Flat Amount	Eiweekly	
MDC Biweekly	5	4,248.78	4,248.78	USD	Flat Amount	Biweekty	

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.



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

COPR Self Sen	ice				D	PR Salary	/ Char
Jonaunan Litt re Lieutenant					MD C	ompensation	Detail
Changes Made Required Field							
Salary Plan							
	Salary Adm	in Plan STE	р		Step		
	Salary	y Grade 345			345		
	Grade Ent	Step 11	7/2006	Q			
		and the		-			
	Step Ent	try Date 02/1	9/2021				
Default Pay C	Step Ent	try Date 02/1	9/2021				
Default Pay C Pay Componer	Step Ent	ry Date 02/1	9/2021				5 rows
Default Pay C Pay Componer	Step Ent	try Date 02/1	9/2021			2	5 rows
Default Pay C Pay Componer &Amounts	Step Ent omponents ts &Controls	Cåhanges	Si2021 C&onversion	Show All		ą	5 rows
Default Pay C Pay Componer &Amounts *Rate Code	Step Ent omponents ts &Controls	Cāhanges Seq Co	SI2021 C&criversion mp Rate Currency	Show All Frequency	Percent Rate Code Gro	up	S rows
Default Pay C Pay Componer &Arnounts *Rate Code 1 CRDV2	Step Ent omponents ts &Controls Q,	Cāhanges Seq Co 0	C&cnversion mp Rate Currency 18.46_USD	Show All Frequency B	Percent Rate Code Gro	ар +	S rows
Default Pay C Pay Componer &Amounts *Rate Code 1 CRDv2 2 FDLE	Step Ent omponents ts &Controls Q, Q,	C&hanges Seq Co 0	C&onversion mp Rate Currency 18.46@USD 184.27@USD	Show All Frequency B B	Percent Rate Code Gro 5.500 MDCMAX	up + +	5 rows
Default Pay C Pay Component &Amounts *Rate Code 1 CRDV2 2 FDLE 3 FRPBA	Step Ent omponents ts &Controls Q Q Q	C&hanges Seq Co 0 0	C&onversion mp Rate Currency 18.46EUSD 184.27EUSD 167.52EUSD	Show All Frequency B B B B	Percent Rate Code Gro 5.500 MDCMAX 5.600 MDCMAX	ap + +	5 rows
Default Pay C Pay Component &Amounts *Rate Code 1 CRDV2 2 FDLE 3 FRPBA 4 MDBKLY	Step Ent smponents ts &Controls Q Q Q Q	Cāhanges Seq Co 0 0 0	9/2021 C&cnversion mp Rate Currency 18.46@USD 184.27@USD 167.52@USD 3.058.50@USD	Show All Frequency B B B B B B	Percent Rate Code Gro 5 500 MDCMAX 5 600 MDCMAX	up + + + + + + + + + + + + + + + + + + +	5 rows

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

C DPR Self Service			DPR Salary Cha	nge			2	
A Jonathan Litt Fire Lieutenant			1 MD Compensation Detail		2 MD Review & Submit			
							< Previous Sul	bmit
Review and Submit								
Tra	insaction Date	01/03/2022						
	Reason	Merit						
		New Information		Current Information				
B	iweekty Salary	3,720.59 USD		3,559.65 USD				
	Annual Rate	96,735.31 USD		92,550.99 USD				
Comments								
This Employee has acknow	wledged their perf	formance reveiw document. The B	Employee qualifies for a Merit Increase.			•		



Lecture 1: The DPR has submitted the Employee's Merit Increase request.

Completing 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.

MAMIGACE		informs
C DPR Self Service	DPR Salary Change	🖸 Q : 🛲
	Your transaction request has been successfully submitted for approval.	
A Jonathan L Fire Lieutenant	4	
Submit Confirm	tion	
DPR Sala	ry Change Approval	
	: Pending 🗇 Www.tide.Commenta	
DP	Listing Change Approval	
	Pending	
	C Aufur Allanen	
	Comments	
Return to DPR Request		



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 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:	At the conclusion of this lesson, you will be able to:
Overview	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	This reports documents performance
Evaluation Completed for Merit	evaluation completion data to help DPRs
Increase Due	determine if a merit increase is appropriate.



Lesson 3: Lesson Summary

Objectives

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

- Achieved
- Understand the list of Reports:

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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



End-User Training Guide - DPR 301: Departmental HR - ePerformance Management

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

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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





The following key terms are used in this course: Definition Term The current state of the Evaluation - Acknowledged, **Document Status** Available for Review, Cancelled, Completed, In Progress, Not Started, or Review Held. Document Review Type varies based upon which Employee will be reviewed: MDC SR. MANAGEMENT MX (for Management Evaluation), MDC-Annual Review EE (for **Document Type** Employee Evaluation), or MDC-Prof/Supervisory Review ME (for Senior Manager Evaluation). A **base** salary increase that Employees may be eligible for if their Overall Rating is "Satisfactory" (or above) based on Merit Increase their salary plan. The average of the Individual Ratings on an Employee's **Overall Rating** performance evaluation. An annual evaluation conducted by a Manager that rates the Performance Employee in various individual Categories and is the basis for Evaluation the employee performance based Merit Increase.

Glossary

Key Terms

56