

Miami-Dade County



End-User Training Guide

Course Code: DPR 302

Course: Departmental HR - Personnel Changes

Course Overview

Course Description

This course provides a comprehensive review of the Business processes for Personnel Changes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Personnel Changes
- 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 INFORMS
- ERP 102 – INFORMS Navigation and Online Help
- HCM 101 – Human Resources Fundamentals

Other Related Courses

Participants can attend the other related courses to Departmental HR:

- DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)
- 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 Day 1 (6 hours)

Day 2 (4 hours)

Total Duration of 10 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
- Key Changes to 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:

- Submit Job Change
- Position Management
- Define Department/Position Budget Data
- Submitting position change
- Submit Job Data Changes that impact benefits
- Submitting HR Transactions
- Submitting HR Salary Changes
- Workflow Approvals
- 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:

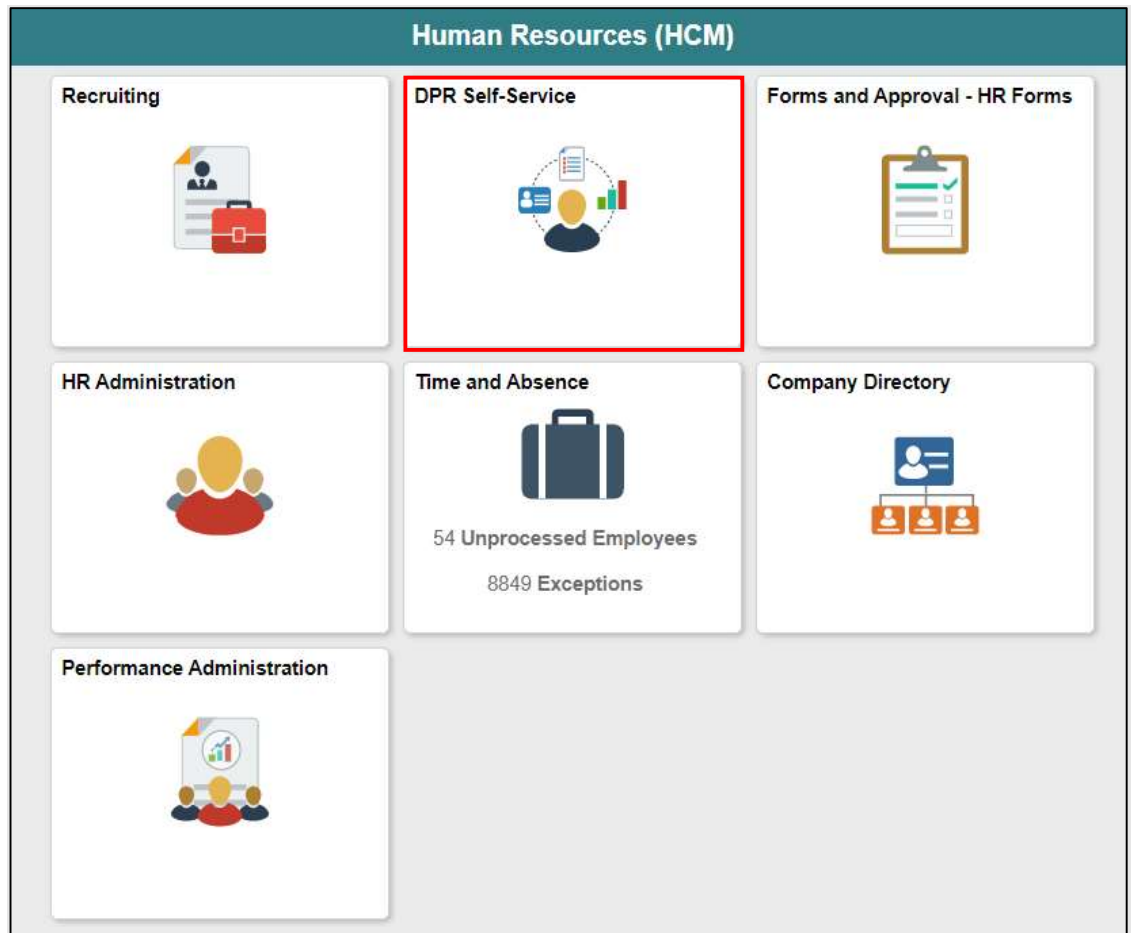
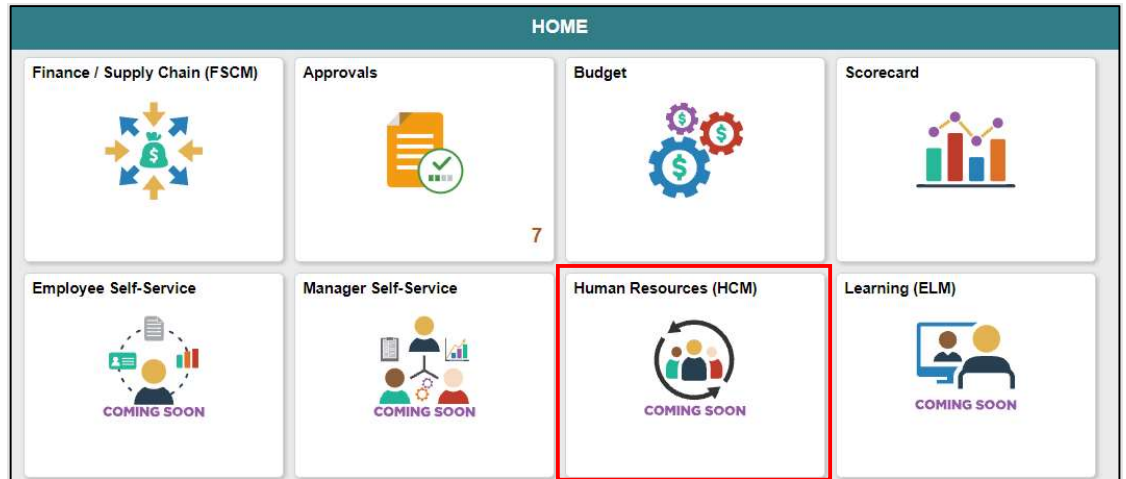
Roles and Responsibilities

- **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

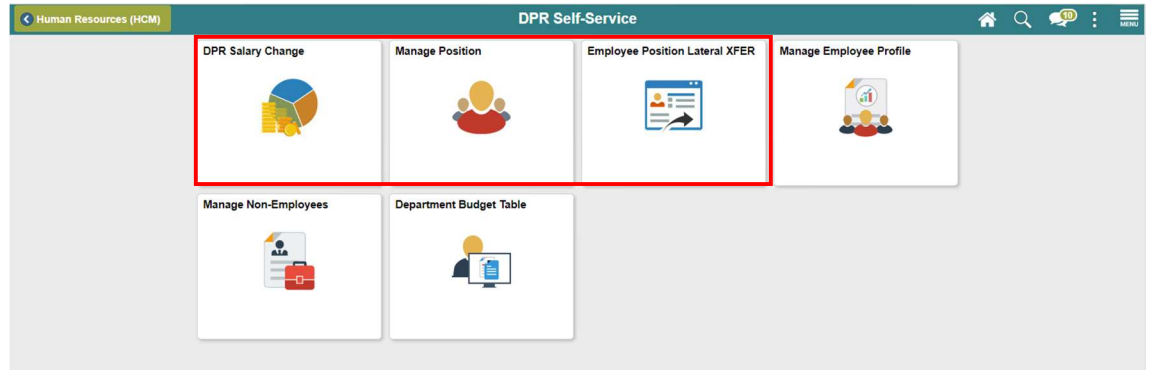
Navigation: Human Resources (HCM)>DPR Self Service



Module 1: Course Introduction

Navigation

The three main Navigations for this guide under DPR Self-Service are **DPR Salary Change, Manage Position, and Employee Position Later XFER**



Navigation for Job Data: **Human Resources (HCM)>HR Administration**



Module 1: Course Introduction

Key Changes to the Business Process

The purpose and benefits of the Departmental Human Resources business process include:

- Reduce paper processes
- Employee Empowerment (Employee Self Service and Manage Self Service, and Mobile Capabilities)
- Reduction of processing time
- Recruit to Hire to Paycheck in one system
- Enhanced Reporting
- Job Opening – Defaults from Position
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System – LOA, retirees, and benefit billing all in one system
- Recruitments will be managed through position wherever possible.
- Miami-Dade County will be using position management

Key Factors:

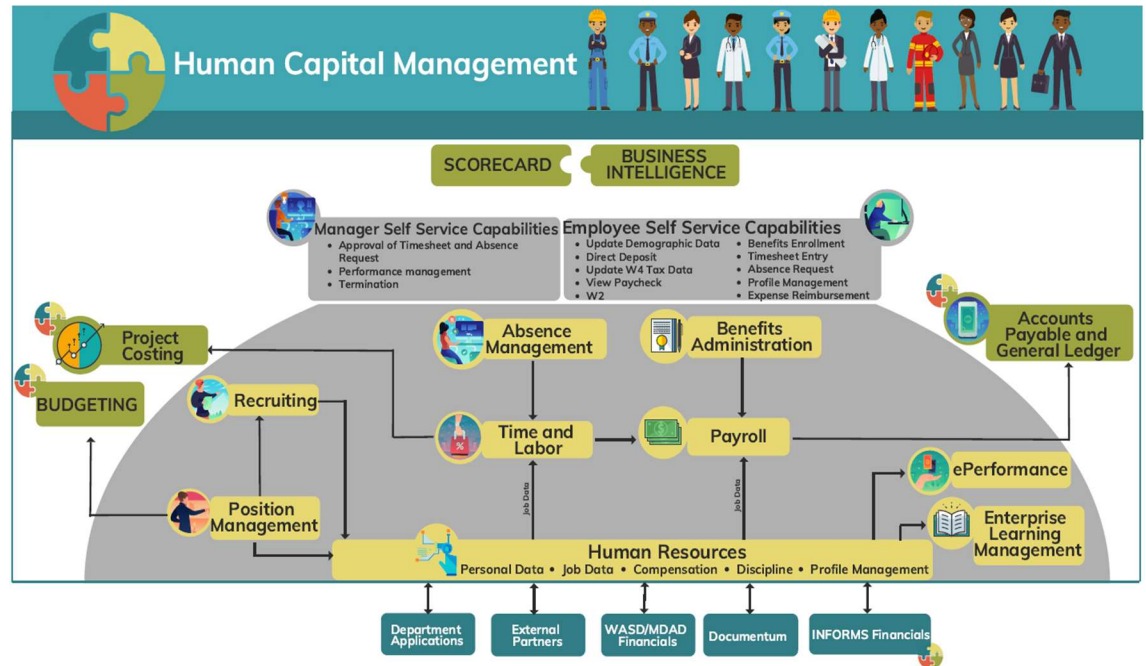
- Positions need to be approved before changes take effect on employee's data.
- Positions needs to be approved before they can be attached to job opening.

Key Terminology Changes

Previous Terminology	New INFORMS Terminology
Departments	Business Unit (Processing Department)
Index Code	Chart of Accounts
Pay Exceptions	Components of Pay and Rate Codes
DDL	Department ID
Adjusted Rate	Hourly Rate
Pay Plan (Steps and Range)	Salary Grade
Money Adjustments	Earning Codes
Occupational Code	Job Code
Status Code	Employee Class

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: Course Introduction Summary

The following key concepts were covered in this module:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Key Changes to the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 2: Personnel Changes

Module 2:
Course
Introduction
Summary

This module includes the following lessons:

- Submit Job Change
- Position Management
- Define Department/Position Budget Data
- Submitting position change
- Submit Job Data Changes that impact benefits
- Submitting HR Transactions
- Submitting HR Salary Changes
- Workflow Approvals
- Reports and Queries

Lesson 1: Position Management

Lesson 1: Overview

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

- Acquire knowledge of the Position Management Business Process
- Learn how to create new position requests
- Learn the Budget Approval Process
- Validate the New Position Request

Lesson 1: Position Management

Lesson 1: Introduction



The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Position Management Changes are as follow:

- Departments can submit requests for new or changes to Position Data
 - For a new position, position data is updated after Budget approval
- Position Data now requires:
 - Lower-level Department IDs (Formerly DDL)
 - FTE/Standard Hours (bi-weekly hours worked) – Bi-weekly rate determined by FTE and Classifies total bi-weekly standard hours for each position
 - Regular/Temporary Indicator – controls Florida Retirement System (FRS) and Benefits Eligibility
 - Job Code will default the Union Code as well as Salary Plan and Grade information
- The DPR will be responsible for adding the default budget funding for new positions as well as updating position budget funding.

Lesson 1: Position Management

Lesson 1: Introduction

Position Management Capabilities

Listed below are fields that flow from Position Data to Job Data

- Job Code
- Regular/Temporary Indicator
- Full/Part-Time Indicator
- Union Code
- Salary Plan and Grade (Step is entered in Job Data during Manage Hire)
- Standard Hours
- FLSA Status (Job Basis/Non-Job Basis)

Lesson 1: Position Management

Key Terms



The following key terms are used in this module:

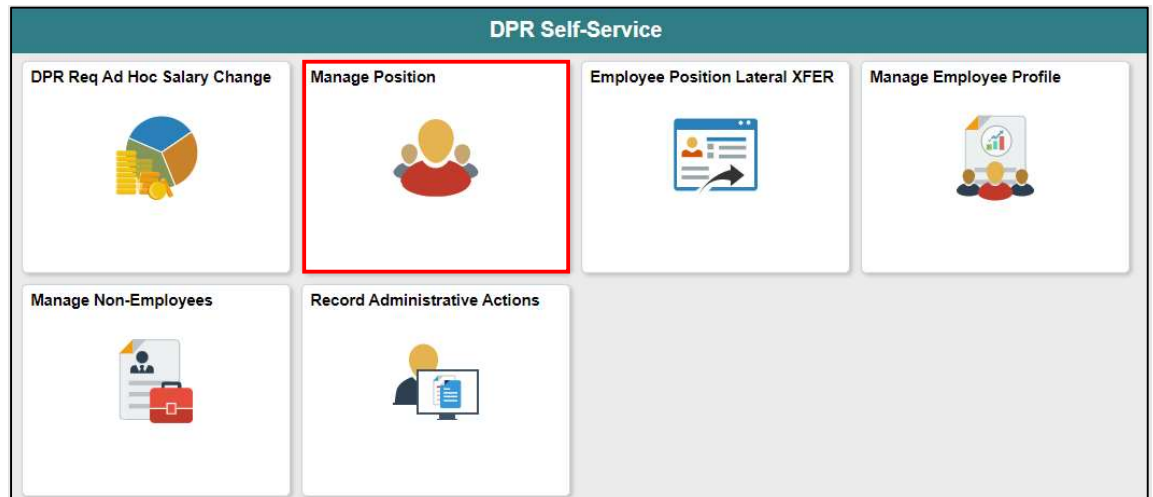
Term	Definition
Full-Time Equivalent (FTE)	<p>A unit that indicates the workload of an employed person. FTE's are often used to measure a worker's involvement.</p> <p>The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.</p>
Job Code	<p>Contains the classification's information such as title, salary plan and grade, bargaining unit, and job description. Previously known as Occupational Code.</p>
Position Data	<p>Information related to the position such as Position Information, Job Information, Work Location, Salary Plan Information.</p>

Lesson 1: Position Management

Lecture 1: Create New Position

Create a New Position as the Department Personnel Representative (DPR).

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**



1. Select the **+Add** button, on the **View Manage/Create Position** page.



On **Create Position** page users can leave the Position Number field as is as the system will automatically generate one.

2. In the ***Effective Date** field, enter a date that correlates with the beginning of the fiscal year.
3. Select **Continue**.



Lesson 1: Position Management

Lecture 1: Create New Position

The Create **New** Position process consists of five **(5) Steps** which are **Position Data, Additional Information, Attachments, Budget Incumbents, and Review and Submit**. Once all of the steps are complete the OMB Budget Administrator will review and approve the request in the system. Once the request is fully approved the new position is successfully established within the system.

The **Position Data** page (Step 1 of 5) is where users enter and review the **Position Information, Job Information, Work Location, and Salary Plan Information**.

In the **Position Information** section, users will select the following:

1. In the ***Filed Status** field, select **Approved**.
NOTE: Proposed is selected when requesting a position for the next Fiscal Year.
2. In the **Max Head Count** field, enter the number of seats you are requesting with the same classification in that position.
3. In the ***Status** field select **Active** as users are requesting to activate a new position.
4. In the **Budgeted Position** ensure **Yes** is selected for budgeted positions.
NOTE: If the position is an **Overage** select **No**.

5. In the **Non-Mayoral** field, ensure **No is selected for positions under the Mayor’s Purview**.

NOTE: Departments NOT under the Mayor’s Purview will select Yes.

The **Senior Management** field (**Leave as default**).

Step 1 of 5: Position Data

Effective Date 12/27/2021	Reason Code NEW New Position
Effective Sequence 0	Approval Status Not Available

Position Information

*Filed Status <input type="text" value="Approved"/>	Max Head Count <input type="text" value="2"/>
*Status <input type="text" value="Active"/>	
Budgeted Position <input checked="" type="radio"/> Yes <input type="radio"/> No	Non-Mayoral <input type="radio"/> Yes <input checked="" type="radio"/> No
Senior Management <input type="radio"/> Yes <input checked="" type="radio"/> No	

Lesson 1: Position Management

Lecture 1: Create New Position

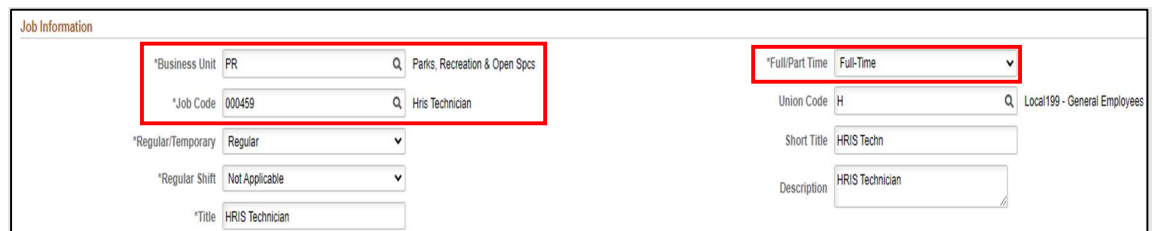
In the **Job Information** section, users will select the following:

6. The ***Business Unit** field will default by security.
7. In the **Full/Part Time** field, select **Full-Time** or **Part-Time** depending on the position.
8. In the ***Job Code** field, select the magnifying glass to search for the respective classification or enter the six-digit **Job Code (00XXXX)**.

NOTE: Once the Job Code is entered, the system will automatically upload the following fields pertaining to the classification selected. Users must leave the following as defaulted:

- **Union Code** (Defaults from Job Code)
- **Short Title** (Defaults from Job Code)
- ***Regular Shift** (Defaults from Job Code)
- **Description** (Defaults from Job Code)
- ***Title** (Defaults from Job Code)
- ***Regular/Temporary** (Defaults as Regular from Job Code)

NOTE: The ***Regular/Temporary** field defaults to Regular for Full-Time positions from the Job Code but users can select Temporary for positions that will not receive benefits.



The screenshot shows the 'Job Information' form with the following fields and values:

- *Business Unit:** PR (Magnifying glass icon) Parks, Recreation & Open Spcs
- *Job Code:** 000459 (Magnifying glass icon) Hris Technician
- *Full/Part Time:** Full-Time (Dropdown arrow)
- Union Code:** H (Magnifying glass icon) Local199 - General Employees
- *Regular/Temporary:** Regular (Dropdown arrow)
- Short Title:** HRIS Techn
- *Regular Shift:** Not Applicable (Dropdown arrow)
- Description:** HRIS Technician
- *Title:** HRIS Technician

Lesson 1: Position Management

**Lecture 1:
Create New
Position**

In the **Work Location** section, users will review or select the following:

9. Ensure ***Reg Region** is set to **USA**.
10. In the ***Department** field, select or enter the **Department ChartField** where the position will be located.
11. In the **Location** field, enter the **Location ChartField** where the position will be located.
12. In the **Reports To** field, select the **reporting position number**.

NOTE: The Reports To field must have the position number of the direct report (immediate supervisor) of the new position.

13. In the **Supervisor Level** field, select the appropriate **Supervisor Level** for the classification.

Listed below is the **Supervisor Level Chart** with their respective description.

Supervisor Level	Description
01	Mayor/Commissioners
02	Deputy Mayors/Special Advisors
03	Assistant to Mayor
04	Department Directors
05	Deputy Directors
06	Assistant Directors
07	Division Directors
08	Assistant to Directors
09	Assistant Division Directors
10	Sr. Bureau Commander/Bureau Commander/Section Head
12	Supervisor Classes
13	Non-Supervisory
14	Nonsupervisory Professionals
15	Protective Services

14. In the ***Company** field, select **MDC** (Miami-Dade County).

Work Location

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">*Reg Region</td> <td style="width: 40%;"><input type="text" value="USA"/></td> <td style="width: 10%; text-align: center;">Q</td> <td style="width: 15%;">United States</td> </tr> <tr> <td>*Department</td> <td><input type="text" value="PR0800000"/></td> <td style="text-align: center;">Q</td> <td>HUMAN RESOURCES</td> </tr> <tr> <td>Location</td> <td><input type="text" value="PR0000001"/></td> <td style="text-align: center;">Q</td> <td>1451 NW 67TH ST</td> </tr> <tr> <td>Reports To</td> <td><input type="text" value="00010781"/></td> <td style="text-align: center;">Q</td> <td>HUMAN RESOURCES MANAGER</td> </tr> </table>	*Reg Region	<input type="text" value="USA"/>	Q	United States	*Department	<input type="text" value="PR0800000"/>	Q	HUMAN RESOURCES	Location	<input type="text" value="PR0000001"/>	Q	1451 NW 67TH ST	Reports To	<input type="text" value="00010781"/>	Q	HUMAN RESOURCES MANAGER	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">*Company</td> <td style="width: 40%;"><input type="text" value="MDC"/></td> <td style="width: 10%; text-align: center;">Q</td> <td style="width: 15%;">Miami Dade County</td> </tr> </table>	*Company	<input type="text" value="MDC"/>	Q	Miami Dade County
*Reg Region	<input type="text" value="USA"/>	Q	United States																		
*Department	<input type="text" value="PR0800000"/>	Q	HUMAN RESOURCES																		
Location	<input type="text" value="PR0000001"/>	Q	1451 NW 67TH ST																		
Reports To	<input type="text" value="00010781"/>	Q	HUMAN RESOURCES MANAGER																		
*Company	<input type="text" value="MDC"/>	Q	Miami Dade County																		
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Supervisor Level</td> <td style="width: 40%;"><input type="text" value="13"/></td> <td style="width: 10%; text-align: center;">Q</td> <td style="width: 15%;">Non-Supervisory</td> </tr> </table>				Supervisor Level	<input type="text" value="13"/>	Q	Non-Supervisory														
Supervisor Level	<input type="text" value="13"/>	Q	Non-Supervisory																		

[View Current Incumbents](#)

Lesson 1: Position Management

Lecture 1: Create New Position

In the **Salary Plan** Information section, the following fields automatically default from the Job Code:

- **Salary Admin Plan** (Leave as Defaulted)
- **Grade** (Leave as Defaulted)
- **Work Period** (Leave as Defaulted)
- **Step** (Leave blank, step is only entered on employee job record.)

15. In the **Stand Hours** field, enter **80** for a **Full-Time position**.

NOTE: If the position is **Part-Time**, list the amount for the **scheduled hours to work**.

The screenshot shows the 'Salary Plan Information' section of a form. It contains several input fields: 'Salary Admin Plan' with the value 'STEP', 'Standard Hours' with the value '80.00', 'Work Period' with the value 'B', 'Grade' with the value '207', and 'Step' which is empty. There is a 'Biweekly' label next to the 'Work Period' field. Each input field has a search icon to its right.

In the **USA** section, the FLSA Status field automatically defaults from the Job Code:

- **FLSA Status - Non-Job Basis/Job Basis** (Leave as Defaulted)

The screenshot shows the 'USA' section of a form. At the bottom right, there is a dropdown menu labeled 'FLSA Status' with the selected value 'Non Job Basis' and a downward arrow icon. The entire section is enclosed in a box with a 'USA' label and a dropdown arrow at the top left.

Lesson 1: Position Management

Lecture 1: Create New Position

✕ Exit
Create Position

Position Number: 00000000
 Headcount Status: Open
 Current Head Count: 0

Next >

1 Position Data
Visited

2 Additional Information
Not Started

3 Attachments
Not Started

4 Budget Incumbents
Not Started

5 Review and Submit
Not Started

Step 1 of 5: Position Data

Effective Date: 12/27/2021

Effective Sequence: 0

Reason Code: NEW - New Position

Approval Status: Not Available

Max Head Count: 2

Non-Mayoral: No

Position Information

*Filed Status: Approved

*Status: Active

Budgeted Position: Yes

Senior Management: No

Job Information

*Business Unit: PR Parks, Recreation & Open Spcs

*Job Code: 000459 Hrs Technician

*Regular/Temporary: Regular

*Regular Shift: Not Applicable

*Title: HRIS Technician

Work Location

*Reg Region: USA United States

*Department: PR08000000 HUMAN RESOURCES

Location: PR00000001 1451 NW 67TH ST

Reports To: 00010781 HUMAN RESOURCES MANAGER [View Current Incumbents](#)

Supervisor Level: 13 Non-Supervisory

Salary Plan Information

Salary Admin Plan: STEP

Standard Hours: 80.00

Work Period: B Biweekly

*Full/Part Time: Full-Time

Union Code: H Local/199 - General Employees

Short Title: HRIS Techn

Description: HRIS Technician

*Company: MDC Miami Dade County

Grade: 207

Step:

Specific Information

USA

FLSA Status: Non-Job Basis

Lesson 1: Position Management

Lecture 1: Create New Position

In the **Additional Information** page (Step 2 of 5), the following fields automatically default:

- ***Pre-Encumbrance Indicator** (Leave as Defaulted)
- ***Encumber Salary Option** (Leave as Defaulted)
- ***Classified Indicator** (Leave as Defaulted)

Toggle **Adds to FTE Account** if position is budgeted. In the **Full-Time Equivalent (FTE)** field, users must enter the proper FTE for the new position.

- For a **Full-Time position the FTE is 1** regardless of the number of employees seated within the position.
- For a **Part-Time position users must properly calculate this by taking the Scheduled hours and dividing it by 80 hours.**
 - **Example:** 59 Scheduled Hours/80 hours = 0.7375 hours. The FTE for this particular Part-Time position would be .7375 which users will enter in the FTE field.

NOTE: This is the factor that will prorate the employee’s salary.

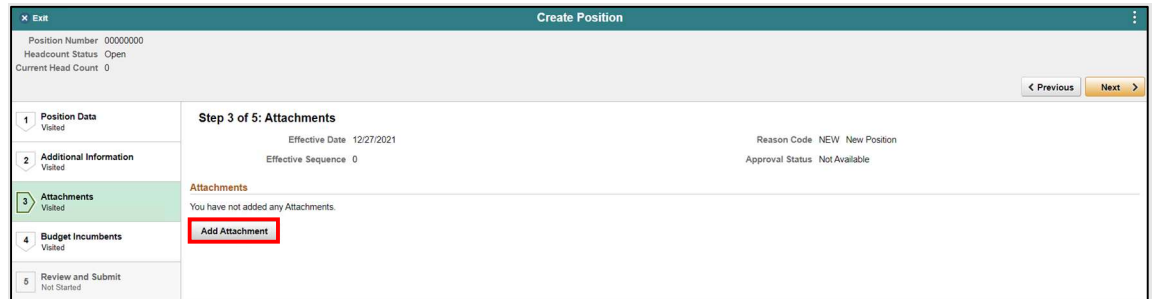
1. In the **FTE field**, enter the **1** for Full-Time.
2. Select **Next** to go to **Attachments – Step 3 of 5.**

Lesson 1: Position Management

Lecture 1: Create New Position

In the **Attachments** page (Step 3 of 5), users will add supporting documentation for the new position.

1. Select **Add Attachment**.

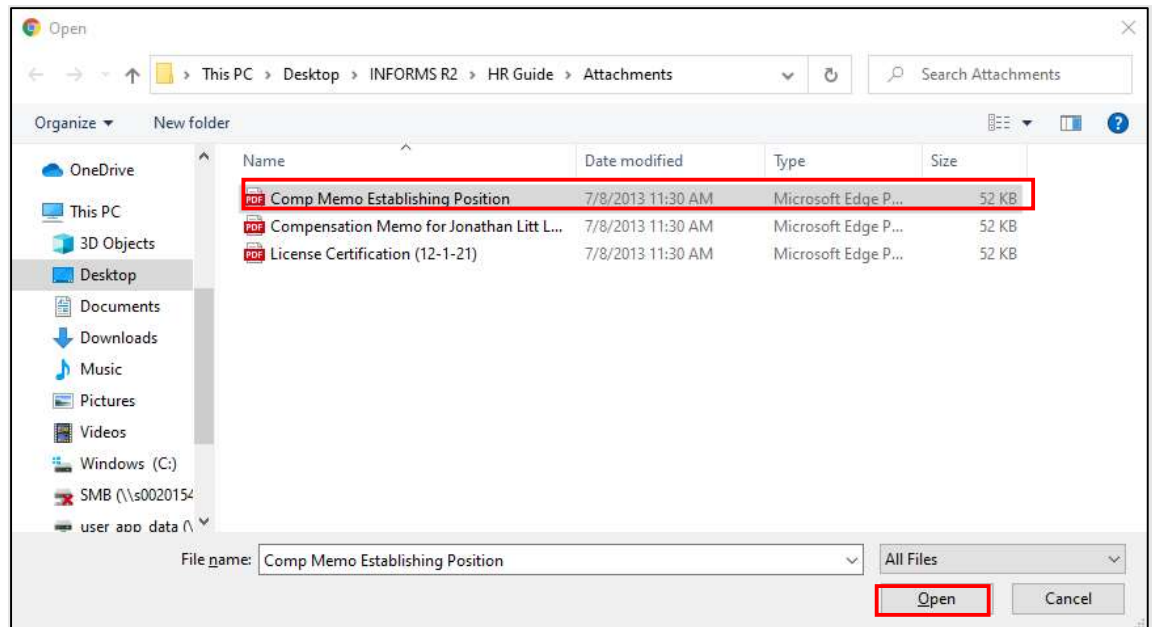


2. Select **My Device**.



3. Search and **select the document being attached**.

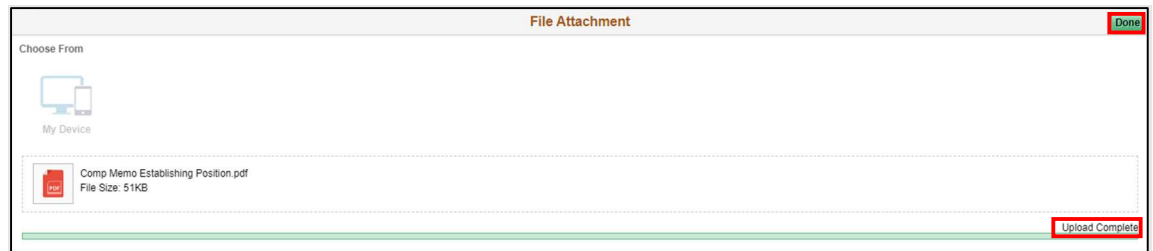
4. Select **Open**.



Lesson 1: Position Management

Lecture 1: Create New Position

5. Select **Upload**.
6. Select **Done** once the upload is complete.



7. In the **Description** field, enter a **brief description of the documentation**.
8. Select **Next** to go to **Budget Incumbents – Step 4 of 5**.

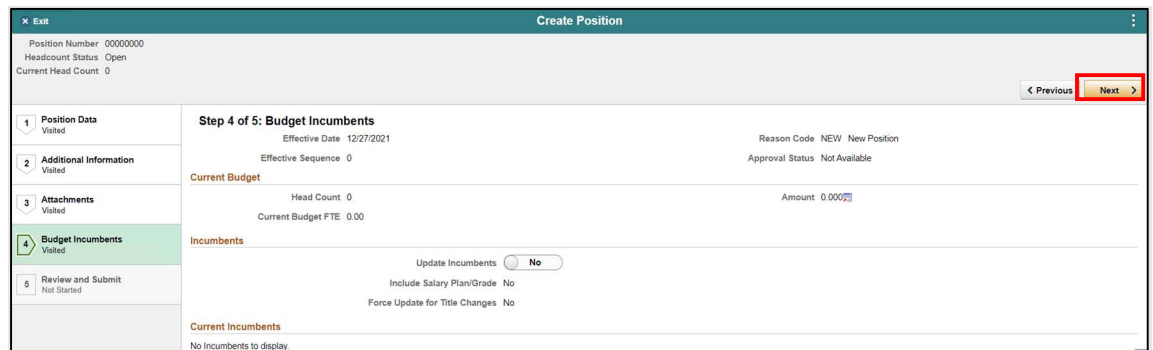


In the **Budget Incumbents** page (Step 4 of 5), users will review and leave defaulted items as is.

- **Update Incumbents (Leave as Defaulted).**

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

1. Select **Next** to go to **Review and Submit – Step 5 of 5**.



Lesson 1: Position Management

Lecture 1: Create New Position

In the **Review and Submit** page (Step 5 of 5), review the **Effective Date, Business Unit, Department, Job Code, Max Head Count, Reports to Position Number, Location Code, and Company** before selecting Submit.

1. Select **Submit**.

Position Number: 00000000
Headcount Status: Open
Current Head Count: 0

Reason Code: NEW New Position
Approval Status: Not Available

Description	Proposed Value
Business Unit	PR
Department	PR08000000
Job Code	000459
Max Head Count	2
Reports To Position Number	00010781
Location Code	PR00000001
Company	MDC

The **Position Confirmation** page is displayed, and the new position request is successfully submitted pending the approval of the OMB Business Administrator.

Notice the **New Position Number** issued.

Position Confirmation

✓ The New Position Number 59000759 has been successfully submitted for approval.

New Position Approval

▼ New Position Pending

<p>New Position Approval</p> <p> Pending</p> <p>Multiple Approvers OMB Administrator ></p>
<p> Not Routed</p> <p>Multiple Approvers Compensation Administrator ></p>

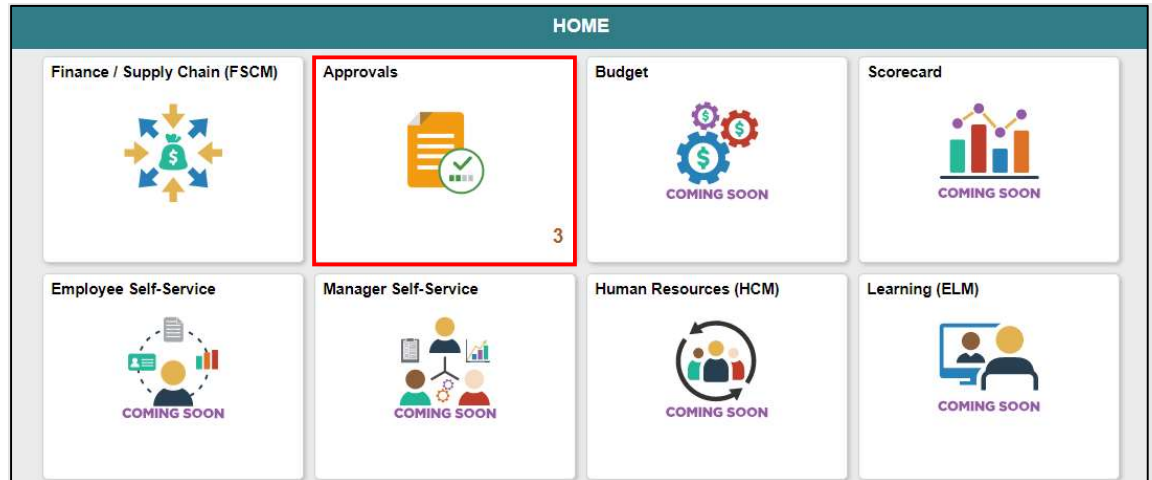
Go to Position Details Go to Manage/Create Position Go to Position Management

Lesson 1: Position Management

Lecture 2: Budget Approval

The OMB Budget Administrator is responsible for approving new position requests within the system.

Navigate to Approvals: Select **Approvals**.



1. Select the **New Position pending approval**.



Lesson 1: Position Management

Lecture 2:
Budget
Approval

Notice the proposed position information is displayed.

2. Select the **View Position Details** hyperlink to view the **details of the new position requested**.

Position Number: 59000759
Title: HRIS Technician

Effective Date: 11/02/21
Effective Sequence: 0
Reason Code: NEW

Description	Proposed
Business Unit	PR
Company	MDC
Department	PR08000000
Job Code	000459
Location Code	PR00000001
Max Head Count	2
Reports To Position Number	00010780

Additional Details

[View Position Details](#)

Attachment Details

Attachments

Approver Comments

Approval Chain

Lesson 1: Position Management

Lecture 2: Budget Approval

A new tab will open displaying all the details of the new position request.

View Position
🏠 🔍 ⋮

Position Number: 5000759
 Headcount Status: Open
 Current Head Count: 0 of 0

Effective Date: 11/02/2021
 Effective Sequence: 0
 Reason: NEW - New Position
 Approval Status: In Approval Process

<< Previous Next >>

Position Information

Position Status: Approved
 Status: Active
 Action Date: 12/22/2021
 Key Position: No
 Budgeted Position: Yes
 Senior Management: No

Max Head Count: 2
 Status Date: 11/02/2021
 Job Sharing Permitted: No
 Non-Mayoral: No

Job Information

Business Unit: PR Parks, Recreation & Open Spcs
 Job Code: 000459 His Technician
 Regular/Temporary: Regular
 Regular Shift: Not Applicable
 Title: HRIS Technician

Manager Level: All Other Positions
 Full/Part Time: Full-Time
 Union Code: H Local#199 - General Employees
 Short Title: HRIS Techn
 Description: HRIS Technician

Work Location

Reg Region: USA United States
 Department: PR00000000 HUMAN RESOURCES
 Location: PR00000001 1451 NW 67TH ST
 Reports To: 00010780 CHIEFHUMAN RESOURCES DIVISION [View Current Incumbents](#)
 Supervisor Lvl: 13 Non-Supervisory

Company: MDC Miami Dade County
 Dot-Line:
 Security Clearance:

Salary Plan Information

Pay Plan:
 Salary Admin Plan: STEP
 Standard Hours: 80.00
 Work Period: B

Grade: 207
 Step:
 Mon Tue Wed Thu Fri Sat Sun
 Biweekly

USA

- ▶ Specific Information
- ▶ Education and Government
- ▶ Budget and Incumbents
- ▶ Summary of Changes
- ▶ Attachments

[View Attachments](#)

Lesson 1: Position Management

Lecture 2:
Budget
Approval

3. Select the **Attachments** tab to view any supporting documentation added to the request.

An **Attachments** pop-up window will be displayed.

4. Select the **attachment hyperlink** to view the supporting documentation.

Attachments	Description	Attached By	Attached
Comp_Memo_Establishing_Position.pdf	Comp Establishment of (2) New Positions (11-2-21)	Xavier Washington	12/22/21 01:38:02 PM

Lesson 1: Position Management

Lecture 2:
Budget
Approval

Once all supporting documentation is reviewed, the user is ready to Approve or Deny the request.

5. Select **Approve**.
NOTE: Enter comments as needed.
6. Select **Submit**.

Notice the Position is no longer in the Pending Approvals page.

Pending Approvals			
2 rows			
Create Position Data Entry Specialist 1	Position Number MD000033 New Position	Routed 12/20/2021	>
Create Position Park Service Aide	Position Number TST00000 New Position	Routed 12/21/2021	>

Lesson 1: Position Management

Lecture 3: Validate Position

Once the New Position request is fully approved, the DPR can validate the position request.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being validated**.
2. Select **Search**.

The position information is displayed.

3. Select the **position being validated**.

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
S9000759	HRIS Technician	00010781	PR	MDC	PR08000000	Active	000459	0/2

Lesson 1: Position Management

Lecture 3:
Validate
Position

Notice the Status displays Approved.

4. Select the **Approval Chain** hyperlink to link to view the approvers.

Search Results								Position Details	
Position Number: 59000759								Clone	
Headcount Status: Open									
Current Head Count: 0 of 2									
1 row									
Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
12/27/2021	0	New Position	Parks, Recreation & Open Spcs	HUMAN RESOURCES	Hrs Technician	1451 NW67TH ST	Approved	Approval Chain	

Notice the OMB Administrator approval as well as the time and dates the request was approved.

Create Position

New Position Approval

▼ New Position
Approved

New Position Approval

✓
Approved

Ulises Lincheta
OMB Administrator
01/10/22 9:34 AM

✓
Approved

Ulises Lincheta
Compensation Administrator
01/10/22 9:35 AM

The position is fully approved and ready for the DPR to add the Budget Funding.

Lesson 1: Training Activity 1

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

Scenario DPR will be creating a new position.

Instructions This activity is 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 1: Training Exercise

Debrief



1. What does FTE Stand for?

2. What is the formula to calculate the FTE for a Part-Time Position?

Lesson 1: Position Management

Lesson Summary



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

- Acquire knowledge of the Position Management Business Process
- Learn how to create new position requests
- Learn the Budget Approval Process
- Validate the New Position Request

Lesson 2: Define Department/ Position Budget Data

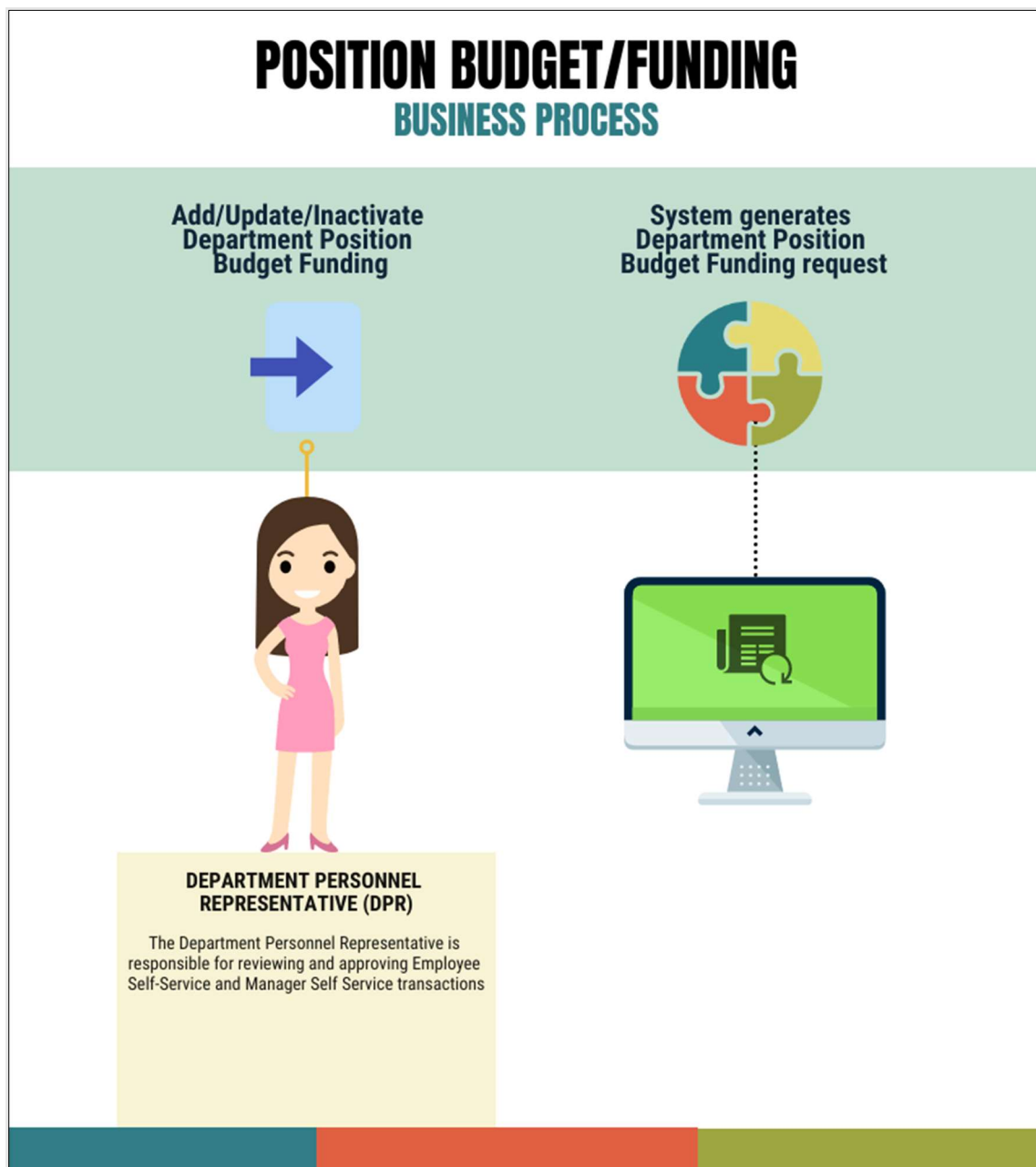
Lesson 2: Overview

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

- Learn how Department budget funding is established for new positions.
- Learn how to update Department budget funding on existing positions.
- Learn how to inactivate Department budget funding for a position.

Lesson 2: Define Department/ Position Budget Data

Lesson 2: Introduction



The Department Personnel Representative (DPR) is responsible for maintaining the Department Position Budget Funding in the Department Budget Table USA page. This includes adding, updating, or inactivating budget funding to positions accordingly.

Lesson 2: Define Department/ Position Budget Data

Lesson 2: Introduction

The Department Budget Table is where designated users can add, update, or inactivate the budget funding of a position.

The Department Budget Table consists of five (5) tabs:

- Dept Budget Date – the Fiscal Year and Budget Begin/End dates as well as the Suspense Combination code are defined here.
- Dept Budget Defaults – the Funding Defaults and Account Overrides are defined here.
- Dept Budget Earnings, Dept Budget Deduction, and Dept Budget Taxes tabs must contain the same fields throughout. The following are defined here:
 - Effective Date – The date the budget funding action begins for new positions. The date when modifying the combination code for a position within a Fiscal Year and when the budget funding ends for inactive positions.
 - Combination Code (Combo Code) – The combination code is used to identify funding sources for the budget.
 - Distribution – The percentage allocated to combination code.
 - Sequence #1 – the initial setup to fund all codes to the same funding string.

The main Department Budget Table USA tabs needed **when adding the budget funding for a new position** are the following:

- Dept Budget Date
- Dept Budget Defaults
- Dept Budget Earnings

The main budget tabs needed **when updating the budget funding for a position** are the following:

- Dept Budget Earnings
- Dept Budget Deductions
- Dept Budget Taxes

NOTE: It is important to ensure that when updating the combination code for a position that the distribution percentage and combination code are the same across the three Dept Budget Earnings, Dept Budget Deductions, and Dept Budget Taxes tabs.

The main budget tab needed **when inactivating the budget funding** for a position is the Dept Budget Earnings tab.

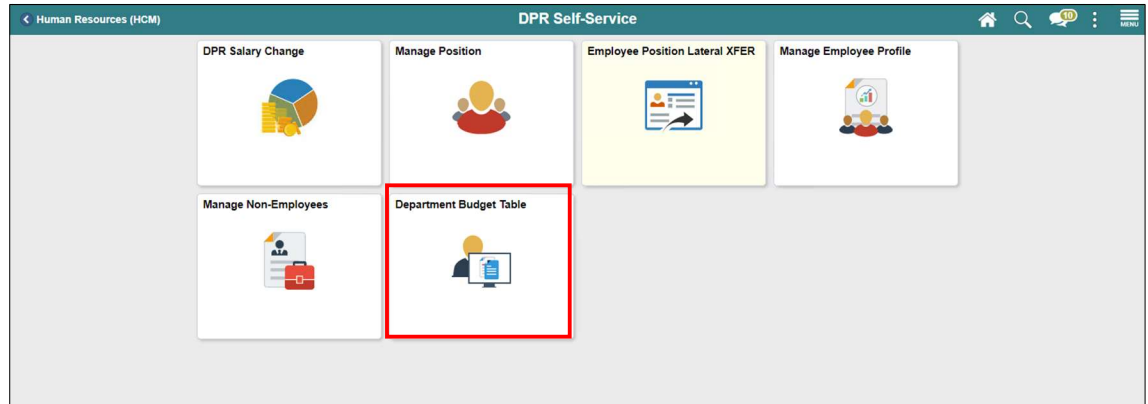
NOTE: The position budget date needs to coincide with the beginning of the fiscal year.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

Once the new position has been fully approved the position is ready for the designated budget funding.

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table**



1. Select the **Add a New Value** tab to add the budget funding for the new position.
2. In the **Set ID** field, ensure it is set to **the Department specific Set ID**.

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

3. In the **Department** field, enter the **Department ID ChartField used when creating the new the position**.

NOTE: The Department ID selected must be the same Department ID used when creating the new position.

4. In the **Fiscal Year** field, enter the **Fiscal Year when the new budget funding will take place**.

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

5. In the **Budget Level** field, select **Position**.

NOTE: Currently the budget funding is at the position level which means that on the job record there is a position assigned to employees.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

6. In the **Position Number** field, enter the **Position Number** for the new position that **requires the budget funding**.
7. Select **Add**.

The screenshot shows the 'Department Budget Table USA' form. At the top, there is a navigation bar with '< HOME' on the left and 'Department Budget Table USA' on the right. Below the navigation bar, the title 'Department Budget Table USA' is displayed. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box. Below these buttons, there are several input fields: 'Set ID' (with 'MDC' entered and a search icon), 'Department' (with a search icon), 'Fiscal Year' (with '0' entered), 'Budget Level' (a dropdown menu), 'Position Pool ID' (with a search icon), 'Job Code Set ID' (with a search icon), 'Job Code' (with a search icon), 'Position Number' (with a search icon and highlighted by a red box), 'Empl ID' (with a search icon), and 'Empl Record' (with '0' entered and a search icon). At the bottom left, there is an 'Add' button highlighted with a red box.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

The Dept Budget Date page requires the Fiscal Year, *Offset Group, and the Suspense Combination Code for funding the new position.

1. Select the **Dept Budget Date** tab.
2. In the ***Budget Begin Date** and ***Budget End Date**, to enter the Beginning and End Date for the Fiscal Year.

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

3. In the ***Offset Group**, select **MDC** for Miami Dade Offset.
4. In the **Suspense Combination Code** section, in the ***Effective Date** field enter the beginning date of the Fiscal Year.

NOTE: The *Effective Date in the Suspense Combination Code is always the beginning date of the Fiscal Year.

5. Select the **ChartField Details** hyperlink to enter the **Suspense Combination Code**.

The screenshot shows the 'Department Budget Table USA' interface. The 'Dept Budget Date' tab is selected. The form displays the following information:

- Set ID:** MDC
- Department:** PR08000000 HUMAN RESOURCES
- Fiscal Year:** 2022
- *Budget Begin Date:** 10/01/2021
- *Budget End Date:** 09/30/2022
- *Offset Group:** MDC (Miami Dade Offset)
- Budget Cap:** Per Budget Level (selected)
- Suspense Combination Code:**
 - *Effective Date:** 10/01/2021
 - Effective Sequence:** 0
 - Combination Code:** (empty)
 - Balance:** 0.00
 - ChartField Details:** (hyperlink)

Buttons at the bottom include Save, Notify, Add, Update/Display, and Include History. Navigation links at the bottom include Dept Budget Date, Dept Budget Defaults, Dept Budget Earnings, Dept Budget Deductions, and Dept Budget Taxes.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

The ChartField Common Component pop up will be displayed.

6. In the **Combination Code** field, enter **SUSP_DEFAULT**.

NOTE: Each Department will have a Department Specific Suspension Combination Code.

Once the **ChartField Details** are loaded, select **Ok**.

ChartField Common Component

ChartField Details

Combination Code:

Search Options: Combination Codes

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
G1001	PR00000000	5001170000	NO-GRANT						

Notice the **Suspense Combination Code** loaded. Review to ensure all fields are correct.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions

Set ID: MDC | Department: PR08000000 HUMAN RESOURCES

Fiscal Year: 2022

*Budget Begin Date: 10/01/2021 | *Budget End Date: 09/30/2022

*Offset Group: MDC Miami Dade Offset

Budget Cap

Per Budget Level | Per Earn/Tax/Ded

Suspense Combination Code

*Effective Date: 10/01/2021

Effective Sequence: 0

Combination Code: **SUSP_DEFAULT** | Default Suspense: [ChartField Details](#)

Balance: 0.00

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

1. Select the **Dept Budget Defaults** tab.

Ensure in Funding Defaults the ***Default Funding Source Option** field is set to **Distrib over Actual Earnings**.

Ensure the following fields are **selected** in the **Account Overrides** section:

- **Use Acct Defined for Earnings**
- **Use Account Defined for Dedns**
- **User Account Defined for US Tax**
- **User Account Defined for Can Tax**

The screenshot shows the 'Department Budget Table USA' interface. The 'Dept Budget Defaults' tab is selected. The form includes fields for Set ID (MDC), Department (PR08000000 HUMAN RESOURCES), Fiscal Year (2022), Budget Begin Date (10/01/2021), Budget End Date (09/30/2022), and Offset Group (MDC Miami Dade Offset). The 'Budget Cap' section has 'Per Budget Level' selected. In the 'Funding Defaults' section, '*Default Funding Source Option' is set to 'Distrib over Actual Earnings'. In the 'Account Overrides' section, four checkboxes are checked: 'Use Acct Defined for Earnings', 'Use Account Defined for Dedns', 'Use Account Defined for US Tax', and 'Use Account Defined for CanTax'. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

1. Select the **Dept Budget Earnings** tab

Notice the **Position number** where the budget funding is being added.

2. In the **Level section's *Effective Date** field, enter the effective date of the beginning of the pay period of the employee's first paycheck.

NOTE: The Level Effective Date should be on or before the pay period beginning of the employee's first paycheck.

3. In the ***Status** field, select **Active**.
4. In the **Earnings Distribution** section, select the **Combination Code** tab.
5. In the ***Sequence Number** field enter **1**.
6. Hit the **Tab** key.
7. In the **Distribution %** field, enter **100**.

The screenshot displays the 'Department Budget Table USA' interface. At the top, there are tabs for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings' (highlighted with a red box), and 'Dept Budget Deductions'. Below the tabs, the 'Set ID' is 'MDC', 'Department' is 'PR08000000 HUMAN RESOURCES', and 'Fiscal Year' is '2022'. The 'Budget Begin Date' is '10/01/2021' and 'Budget End Date' is '09/30/2022'. The 'Budget Cap' is set to 'Per Budget Level'. The 'Level' section shows 'Position' selected, with 'Position Number' '59000759' (highlighted with a red box), 'Effective Date' '11/15/2021' (highlighted with a red box), and 'Status' 'Active' (highlighted with a red box). The 'Earnings Distribution' table has one row with 'Sequence Number' '1' (highlighted with a red box) and 'Distribution %' '100' (highlighted with a red box). At the bottom, there are 'Save' and 'Notify' buttons, and 'Add', 'Update/Display', and 'Include History' buttons.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

8. Select the **Combination Code Description** tab.
9. Select the **ChartField Details** hyperlink to select the Combination Code.

The screenshot shows the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected. The 'Combination Code Description' tab is highlighted in red. Below it, the 'ChartField Details' link is also highlighted in red. The interface includes fields for Set ID, MDC, Department, Budget Begin Date, Budget End Date, Fiscal Year, Budget Cap, and Position Number. The 'Earnings Distribution' section shows a table with columns for Earnings Code, Sequence Number, Combination Code, Combination Code Description, and ChartField Details.

The **ChartField Common Component** is now displayed. The Combination Code consists of a list of selected ChartField strings with the Fund Code, Department, Account, and Grant information as well as the Project Costing (PC) Business Unit, Project, and Activity for departments that use INFORMS Project Costing. The Combination Code is administered by Central Finance.

NOTE: If you do not know the Combination Code select the Search button to search with any specific ChartField Detail field. If there is no Combination Code with specific ChartFields required for that position, contact Central Finance to assist with creating the new Combination Code.

10. Select **Search** to locate the Combination Code.

The screenshot shows the 'ChartField Common Component' dialog box. The 'Search Options' section has 'Combination Codes' selected. The 'Search' button is highlighted in red. Below the search options is a table with columns for Fund Code, Department, Account, Grant, PC Business Unit, Project, Activity, Source Type, Category, and Subcategory. The 'Search' button is also highlighted in red.

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

11. Enter the **ChartFields** and select **Search**.

The Combination Code ChartFields will be displayed.

12. Select the **Select** button to load the **Combination Code**.

Search Combination Codes

GL Combination Code

Search by ChartFields

Fund Code: G4001
 Department: PR08010000
 Account: 5001100000
 Grant: NO-GRANT

Source Type:
 Category:
 Subcategory:
 Fund Affiliate:
 Grant Affiliate:
 Affiliate:
 ChartField 1:
 ChartField 2:
 ChartField 3:
 Product:

PC Business Unit:
 Project:
 Activity:

Buttons: Search, Clear, Cancel

Combination Code / ChartFields

Select	GL Combo Code	Account	Department	Project	Product	Fund Code	Affiliate	Grant	ChartField 1	ChartField 2
1 <input type="button" value="Select"/>	000000815	5001100000	PR08010000			G4001		NO-GRANT		

Notice the Combination Code is now loaded in the Combination Code field.

13. Select **Save**.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | **Dept Budget Earnings** | Dept Budget Deductions

Set ID: MDC | Department: PR08000000 | HUMAN RESOURCES | Fiscal Year: 2022

Budget Begin Date: 10/01/2021 | Offset Group: MDC

Budget End Date: 09/30/2022

Default Funding Source Option: Distrib over Actual Earnings

Budget Cap: Per Budget Level | Per Earn/Tax/Ded

Level: Department | Position Pool | Jobcode | Position | Appointment

Position Number: 59000759 | HRIS Technician

*Effective Date: 11/15/2021 | Eff Seq: 0 | *Status: Active | Date Entered: 03/04/2022

Budget Level Cap: 0.00 | *Currency: USD

Earnings Distribution

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	000000815	EMPLOYEE REGULAR	<input type="button" value="ChartField Details"/>

Buttons: Save, Notify, Add, Update/Display, Include History

Lesson 2: Define Department/Position Budget Data

Lecture 1: Add Position Budget Funding

Notice the **Dept Budget Deductions** and **Dept Budget Taxes** pages automatically have the **Sequence**, **Distribution %**, and **Combination Code** entered.

Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions** | Dept Budget Taxes

Set ID: MDC | Department: PR0800000 HUMAN RESOURCES | Fiscal Year: 2022
 Budget Begin Date: 10/01/2021 | Budget End Date: 09/30/2022 | Offset Group: MDC
 Default Funding Source Option: Distrib over Actual Earnings

Level: Department | Position Pool | Jobcode | **Position** | Appointment

Position Number: 59000759 | HRIS Technician | Status: Active | Date Entered: 03/04/2022

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1				1	000000815	<input type="checkbox"/>			100.000

Buttons: Save, Notify, Add, Update/Display, Include History

Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | **Dept Budget Taxes**

Set ID: MDC | Department: PR0800000 HUMAN RESOURCES | Fiscal Year: 2022
 Budget Begin Date: 10/01/2021 | Budget End Date: 09/30/2022 | Offset Group: MDC
 Default Funding Source Option: Distrib over Actual Earnings

Level: Department | Position Pool | Jobcode | **Position** | Appointment

Position Number: 59000759 | HRIS Technician | Status: Active | Date Entered: 03/04/2022

Tax Distribution

State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	000000815	<input type="checkbox"/>			100.000

Buttons: Save, Notify, Add, Update/Display, Include History

The Position Budget Funding has been successfully loaded to the new position.

Lesson 2: Define Department/Position Budget Data

Lecture 2: Update Position Budget Funding

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table**

1. Select the **Find an Existing Value** tab to update the budget funding for a position.
2. In the **Set ID** field, ensure it is set to **the specific Department's Set ID**.

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

3. In the **Department** field, enter the **Department ChartField** related to the position.
4. In the **Fiscal Year** field, enter the **Fiscal Year when the new budget funding will take place**.

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

5. In the **Position Number** field, enter the **Position Number for the active position that requires the new budget funding**.
6. Select **Search**.

Department Budget Table USA

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Set ID = MDC

Department begins with

Fiscal Year =

Budget Level =

Position Pool ID begins with

Job Code Set ID begins with

Job Code begins with

Position Number begins with

Empl ID begins with

Empl Record =

Include History

Search | Clear | Basic Search | Save Search Criteria

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

In the **Dept Budget Earnings** page users are responsible for updating the ***Effective Date**, ***Sequence Number**, **Distribution percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Earnings** tab.
2. On the **Level** Section, select the **plus sign (+)** to enter the ***Effective Date** which is the **date of the beginning of the pay period the new funding will be effective**.

NOTE: The Effective Date must be the date of the beginning of the Pay Period of that specific week and must fall within the Budget Begin Date and Budget End Date.

3. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1 as the sequence number**.
4. In the **Distribution %** field, enter the **percentage of the distribution**.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected. Key fields include:

- Set ID: MDC
- Department: CH00000000
- Budget Begin Date: 10/01/2020
- Budget End Date: 09/30/2021
- Offset Group: MDC
- Budget Cap: Per Budget Level
- Default Funding Source Option: Distrib over Actual Earnings

 The 'Level' section shows:

- Position Number: 00000881
- *Effective Date: 06/28/2021
- SOCIAL WORKER AIDE
- Eff Seq: 0
- *Status: Active
- Date Entered: 02/17/2022
- Budget Level Cap: 9,999,999,999.00
- *Currency: USD

 The 'Earnings Distribution' table is as follows:

Earnings Code	*Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Distribution %
1	1	000000199			100.000

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

5. Select the **Combination Code Description** tab to update the current budget funding and select the new Combination Code.
6. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

< Human Resources (HCM)
Department Budget Table USA

Dept Budget Date
Dept Budget Defaults
Dept Budget Earnings
Dept Budget Deductions >

Set ID	MDC	Department	CH00000000	COMM.ACTION & HUMAN SRVC. DPT.	Fiscal Year	2021
		Budget Begin Date	10/01/2020	Offset Group	MDC	Budget Cap
		Budget End Date	09/30/2021			<input checked="" type="radio"/> Per Budget Level <input type="radio"/> Per Earn/Tax/Ded
		Default Funding Source Option	Distrib over Actual Earnings			

Level 1 of 2

Department
 Position Pool
 Jobcode
 Position
 Appointment

Position Number	00000881	SOCIAL WORKER AIDE	*Status	Active	Date Entered	02/17/2022
*Effective Date	06/28/2021	Eff Seq	0	*Currency	USD	
Budget Level Cap	9,999,999,999.00					

Earnings Distribution

Combination Code	Distributed	Earning Code Description	Combination Code Description	Exclusion Fringe Group	Redirect Combo Code
1	1	000000199	EMPLOYEE REGULAR		ChartField Details

Save
Return to Search
Notify

Add
Update/Display
Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lesson 2: Define Department/Position Budget Data

Lecture 2: Update Position Budget Funding

The **ChartField Common Component** is now displayed. The Combination Code consists of a list of selected ChartField strings with the Fund Code, Department, Account, and Grant information as well as the PC Business Unit, Project, and Activity for departments that use Project Costing. The Combination Code is created and administered by Central Finance.

NOTE: If you do not know the Combination Code select the Search button to search with any specific ChartField Detail field. If there is no Combination Code with specific ChartFields required for that position, contact Central Finance to assist with creating the new Combination Code.

7. In the **Combination Code** field, enter the **Combination Code with the proper ChartField details for the position.**
8. Select **Ok**.

ChartField Common Component

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes [Search]

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
SC001	CH01010101	5001100000	NO-GRANT						

[Ok] [Cancel]

Notice the updated Combination Code and Combination Code Description.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | **Dept Budget Earnings** | Dept Budget Deductions

Set ID: MDC | Department: CH00000000 | COMM.ACTION & HUMAN SRVC. DPT. | Fiscal Year: 2021

Budget Begin Date: 10/01/2020 | Offset Group: MDC | Budget Cap: Per Budget Level

Budget End Date: 09/30/2021 | Default Funding Source Option: Distrib over Actual Earnings

Level: Position

Position Number: 00000881 | SOCIAL WORKER AIDE | Status: Active

*Effective Date: 06/28/2021 | Eff Seq: 0 | *Currency: USD

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	00000200	EMPLOYEE REGULAR	

[Save] [Return to Search] [Notify] [Add] [Update/Display] [Include History]

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

In the **Dept Budget Deductions** page users are responsible for updating the ***Sequence Number**, **Distribution percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Deductions** tab.
2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1** as the **sequence number**.
3. In the **Distribution %** field, enter the **percentage of the distribution**.

The screenshot shows the 'Dept Budget Deductions' tab selected. The 'Combination Code' field is highlighted with a red box. The 'Sequence Number' field is highlighted with a red box and contains the value '1'. The 'Distribution %' field is highlighted with a red box and contains the value '100.000'. The 'Plan Type' is set to '1'. The 'Plan' is '00000000'. The 'Deduction Code' is '00000000'. The 'Deduction Class' is '00000000'. The 'Combination Code' is '000000200'. The 'Override' is '0'. The 'Funding End Date' is '09/30/2021'. The 'Fiscal Year Budget Amount' is '100.000'. The 'Distribution %' is '100.000'. The 'Save' button is highlighted with a green box.

4. Select the **Combination Code Description** tab in order to update the current budget funding and select the new Combination Code.
5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

The screenshot shows the 'Combination Code Description' tab selected. The 'Combination Code Description' field is highlighted with a red box. The 'ChartField Details' field is highlighted with a red box and contains the value 'EMPLOYEE REGULAR'. The 'Plan Type' is set to '1'. The 'Plan' is '00000000'. The 'Deduction Code' is '00000000'. The 'Deduction Class' is '00000000'. The '*Sequence Number' is '1'. The 'Combination Code' is '000000199'. The 'Combination Code Description' is 'EMPLOYEE REGULAR'. The 'ChartField Details' is 'EMPLOYEE REGULAR'. The 'Save' button is highlighted with a green box.

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

The **ChartField Common Component** is now displayed.

6. In the **Combination Code** field, enter the same **Combination Code** entered on the **Dept Budget Earnings** page.
7. Select **Ok**.

ChartField Common Component

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes [Search]

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
SC001	CH01010101	5001100000	NO-GRANT						

[Ok] [Cancel]

Notice the updated Combination Code and Combination Code Description listed.

8. Select the **greater than sign (>)** to expand and go to the **Dept Budget Taxes** tab.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions >**

Set ID: MDC | Department: CH00000000 | COMM.ACTION & HUMAN SRVC. DPT. | Fiscal Year: 2021

Budget Begin Date: 10/01/2020 | Budget End Date: 09/30/2021 | Offset Group: MDC

Default Funding Source Option: | Distrib over Actual Earnings

Level

Department | Position Pool | Jobcode | Position | Appointment

Position Number: 00000981 | SOCIAL WORKER AIDE

Effective Date: 09/29/2021 | Eff Seq: 0 | Status: Active | Date Entered: 02/17/2022

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1				1	00000200	EMPLOYEE REGULAR	ChartField Details

[Save] [Return to Search] [Notify] [Add] [Update/Display] [Include History]

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

In the **Dept Budget Taxes** page users are responsible for updating the ***Sequence Number**, **Distribution percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Taxes** tab.
2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1** as the **sequence number**.
3. In the **Distribution %** field, enter the **percentage of the distribution**.

State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	000000200				100.000

4. Select the **Combination Code Description** tab in order to update the current budget funding and select the new Combination Code.
5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	000000199		EMPLOYEE REGULAR

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

The **ChartField Common Component** is now displayed.

6. In the **Combination Code** field, enter the same **Combination Code** entered on the **Dept Budget Earnings** page.
7. Select **OK**.

ChartField Common Component

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
SC001	CH01010101	5001100000	NO-GRANT						

OK Cancel

Notice the updated Combination Code and Combination Code Description listed.

8. Select the **View All** hyperlink to view the budget funding changes.

Human Resources (HCM) Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | **Dept Budget Taxes**

Set ID: MDC | Department: CH00000000 | COMM.ACTION & HUMAN SRVC: DPT | Fiscal Year: 2021
 Budget Begin Date: 10/01/2020 | Budget End Date: 09/30/2021 | Offset Group: MDC
 Default Funding Source Option: Distrib over Actual Earnings

Level: [View All](#)

Position Number: 00000881 | SOCIAL WORKER AIDE | Eff Date: 06/28/2021 | Status: Active | Date Entered: 02/17/2022

State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	00000200	ChartField Details	EMPLOYEE REGULAR

Save | Return to Search | Notify | Add | Update/Display | Include History

Lesson 2: Define Department/ Position Budget Data

Lecture 2: Update Position Budget Funding

The page expands and now the new and historic information is displayed. Notice the two different **Effective Dates, Date Entered, and Combination Code of the two records.**

9. Review the changes and select **Save**.

The screenshot displays the 'Department Budget Table USA' interface. It shows two records for 'SOCIAL WORKER AIDE' with the following details:

Record	Effective Date	Date Entered	Combination Code	Combination Code Description
1	06/28/2021	02/17/2022	00000200	EMPLOYEE REGULAR
1	10/01/2020	07/01/2021	00000199	EMPLOYEE REGULAR

The interface includes navigation tabs (Dept Budget Defaults, Dept Budget Earnings, Dept Budget Deductions, Dept Budget Taxes), search filters, and a 'Tax Distribution' table. The 'Save' button is visible at the bottom left.

The Updating Budget Funding process is now complete.

Lesson 2: Define Department/ Position Budget Data

Lecture 3 – Inactivate Position Budget Funding

When inactivating the budget funding of a position users must ensure the position was fully approved and inactivated via Position Management before inactivating the budget funding. There cannot be an incumbent in the position if the position is set to be deactivated and defunded.

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table**

1. Select the **Find an Existing Value** tab to update the budget funding for a position.
2. In the **Set ID** field, ensure it is set to **the specific Department's Set ID**.

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

3. In the **Department** field, enter the **Department ChartField** related to the position.
4. In the **Fiscal Year** field, enter the **Fiscal Year when the budget funding will become inactive**.

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

5. In the **Position Number** field, enter the **Position Number of the position that is being inactivated**.
6. Select **Search**.

The screenshot shows the 'Department Budget Table USA' search interface. The 'Find an Existing Value' tab is active. The search criteria section includes the following fields:

- Set ID: MDC
- Department: begins with
- Fiscal Year:
- Budget Level:
- Position Pool ID: begins with
- Job Code Set ID: begins with
- Job Code: begins with
- Position Number: begins with
- Empl ID: begins with
- Empl Record:

The 'Search' button is highlighted in red.

Lesson 2: Define Department/ Position Budget Data

Lecture 3 – Inactivate Position Budget Funding

7. Select the **Dept Budget Earnings** tab.
8. On the **Level** Section, select the **plus sign (+)** to enter the ***Effective Date** which is the **date the of budget funding activation**.

NOTE: The Effective Date must be the date of the end of the Pay Period you intend to inactivate plus 1 and must fall within the Budget Begin Date and Budget End Date.

9. In the ***Status** field, select **Inactive**.
10. Select **Save**.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is active. The 'Level' section shows the following details:

- Position Number: 00000881
- Effective Date: 08/09/2021
- Eff Seq: 0
- *Status: Inactive
- Date Entered: 02/25/2022
- Budget Level Cap: 9,999,999,999.00
- *Currency: USD

The 'Earnings Distribution' table is shown below:

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	000000200	EMPLOYEE REGULAR	ChartField Details

The position’s budget funding is now inactive, and the Inactivate Position Budget Funding process is complete.

Lesson 2: Define Department/ Position Budget Data

Key Terms



The following key terms are used in this module:

Term	Definition
Combination Code	A key that defines a combination of ChartFields needed for Position Budget Funding

Lesson 2: Training Activity 1

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

Scenario DPR will add position budget funding.

Instructions This activity is 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. When adding the Budget Funding to a New Position what is the Effective Date of the Suspense Combination Code?

2. Who do you contact if you do not see the Combination Code you need when adding or updating the funding to the position?

Lesson 2: Define Department/ Position Budget Data

Lesson Summary



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

- Learn how Department budget funding is established for new positions
- Learn how to update Department budget funding on existing positions.
- Learn how to inactivate Department budget funding for a position.

Lesson 3: Submitting Position Change

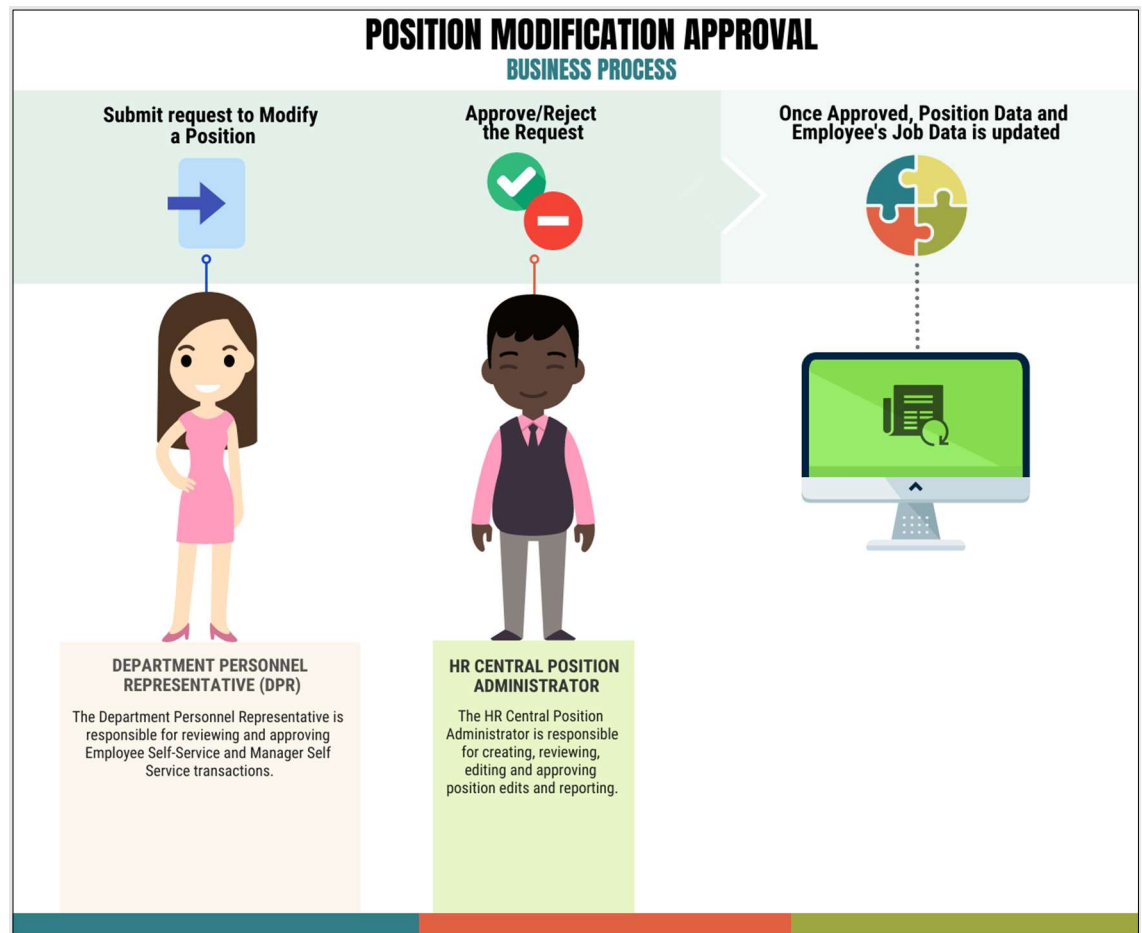
Lesson 3: Overview

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

- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

Lesson 3: Submitting Position Change

Lesson 3: Introduction



The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

The Department Personnel Representative (DPR) is responsible for modifying positions as needed. Some position modifications are changing a position from Temporary to Regular; inactivating a position; changing reporting structure; position status change, and position data update.

There are two position effective dates:

- Top of Stack – If the position effective date is equal to or greater than the Job effective date. The system automatically updates the Job record once approved.
- Sandwich Row – If the position effective date lands in between the Job effective dates, the position row will not be added. The Job record will be manually updated by the HR Position Administrator.

Lesson 3: Submitting Position Change

Key Terms



The following key terms are used in this module:

Term	Definition
Sandwich Row	Position effective date lands in between Job effective dates, position row will not be added. The Job record will be manually updated by the HR Position Administrator.
Top of Stack	Position effective date is equal to or greater than Job effective date, system automatically updates Job record once approved.

Lesson 3: Submitting Position Change

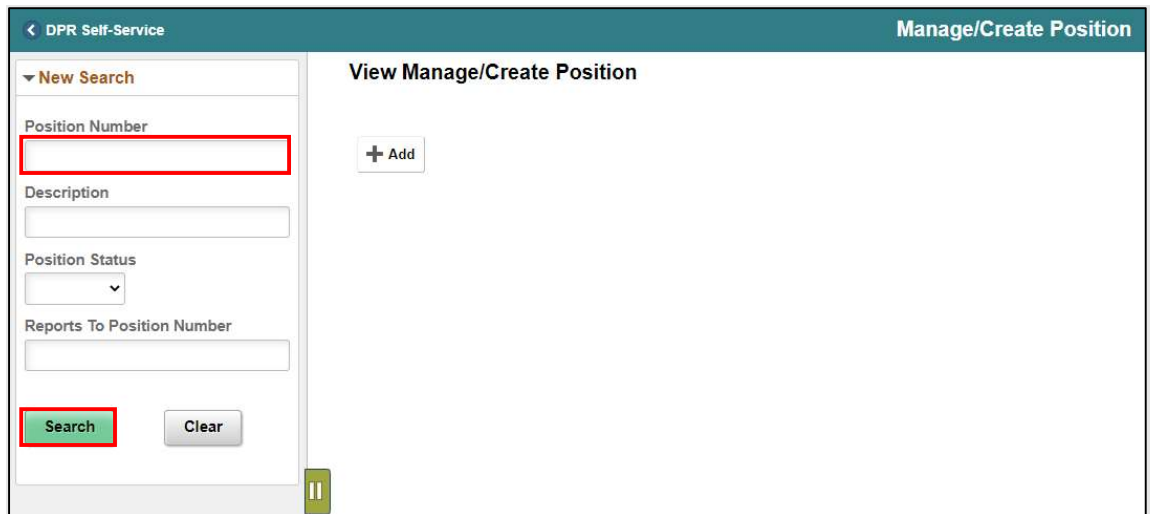
Lecture 1: Modify Position

The DPR has the ability to request modifications to positions that have been fully approved. Some modifications will affect the effective date such as changing the position from temporary to regular; inactivating a position; changing the reporting structure; and updating the position status.

The following example will display how to modify a position's reporting structure.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being modified**.
2. Select **Search**.



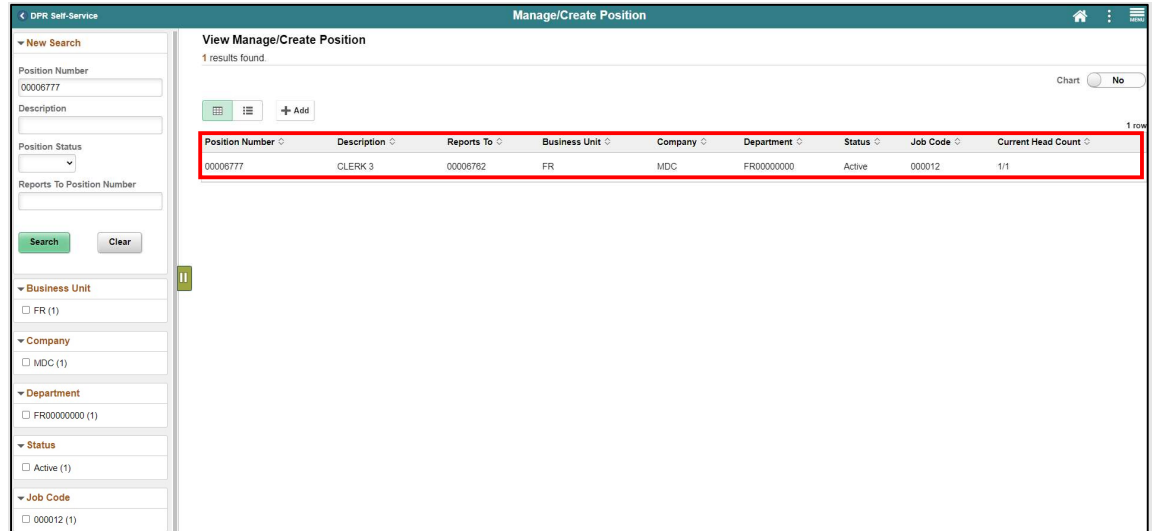
The screenshot displays the 'Manage/Create Position' interface within the 'DPR Self-Service' application. On the left side, there is a search form titled 'New Search'. It contains the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons, with the 'Search' button also highlighted with a red box. On the right side, the main area is titled 'View Manage/Create Position' and contains a '+ Add' button. The top navigation bar shows 'DPR Self-Service' on the left and 'Manage/Create Position' on the right.

Lesson 3: Submitting Position Change

Lecture 1: Modify Position

The position information is displayed.

1. Select the **position being modified**.



2. Select the **Plus Sign (+)** above the **Effective Date** to **modify the position with a new effective date**.



Lesson 3: Submitting Position Change

Lecture 1: Modify Position

The **Request Details** pop-up is displayed to enter the new effective date and the modification reason.

Listed below are some of the **common Modification Reason Codes** users will use when making modifications.

Reason Code	Description
FTE	Change from Temporary to Regular
INA	Position Inactivated (Must have an effective date and no incumbents in the position)
RTC	Reports to Change (Must have an effective date and incumbents in the position)
STA	Position Status Change
UPD	Position Data Update

3. In the ***Effective Date**, enter the **new effective date**.
4. In the **Reason Code** field, select **RTC (Reports to Change)** as the reason.
5. Select **Continue**.

The **Position Data** page (Step 1 of 5) will be displayed, and users will have to go through the 5 steps of Manage a Position to complete the request.

6. In the **Work Location** section, in the **Reports To** field, **enter the position number of the new immediate supervisor**.

Lesson 3: Submitting Position Change

Lecture 1: Modify Position

7. Review the requested modifications and select **Next**.

8. Review **Additional Information** page (Step 2 of 5) and select **Next**.

Attachments for this process are optional.

9. Review **Attachments** page (Step 3 of 5) and select **Next**.

Lesson 3: Submitting Position Change

Lecture 1: Modify Position

10. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

Notice in the **Current Incumbents** section, the incumbent in the current position is listed.

11. Review **Budget Incumbents** page (Step 4 of 5) and select **Next**.

Manage Position

Position Number: 00006777
Headcount Status: Filled
Current Head Count: 1 of 1

Step 4 of 5: Budget Incumbents

Effective Date: 01/05/2022
Reason Code: RTC Reports To Change
Effective Sequence: 0
Approval Status: Not Available

Current Budget

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

Incumbents

Update Incumbents: Yes No
 Include Salary Plan/Grade: No Yes
 Force Update for Title Changes: No Yes

Current Incumbents

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Glinda King	00198155	0	Full-Time	80.00	12/28/2020	Data Change	Conversion	N	Job Data

12. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.

13. Select **Submit** once the requested modifications are ready for processing.

Manage Position

Position Number: 00006777
Headcount Status: Filled
Current Head Count: 1 of 1

Step 5 of 5: Review and Submit

Effective Date: 01/05/2022
Reason Code: RTC Reports To Change
Effective Sequence: 0
Approval Status: Not Available

Summary Of Changes

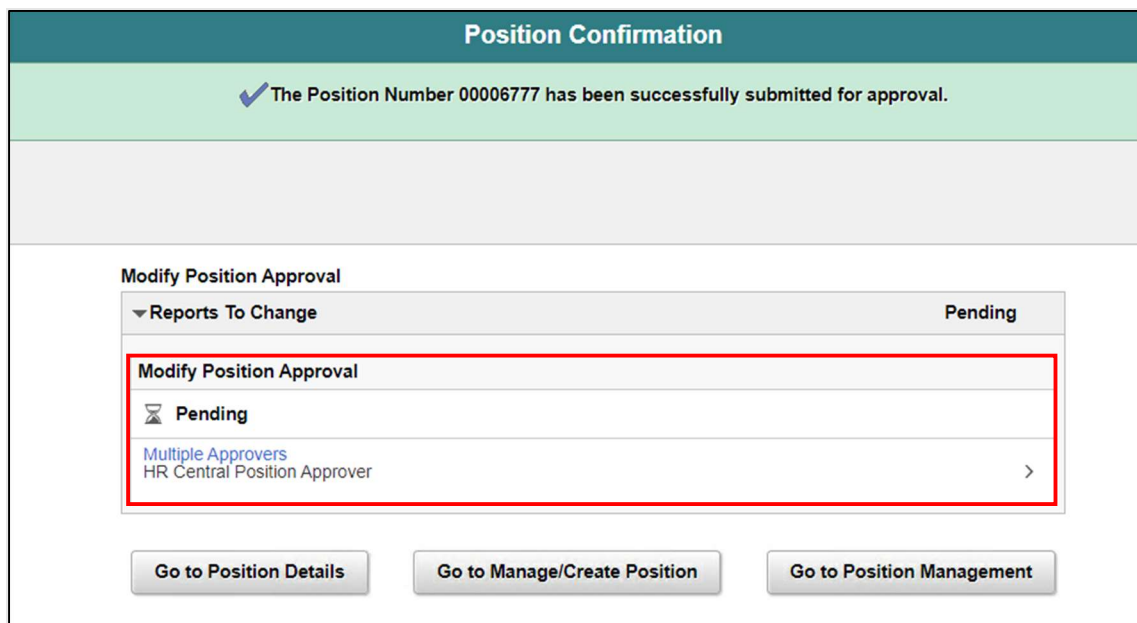
Description	Proposed Value	Current Value
Reason Code	RTC	CNV
Action Date	2022-01-10	2014-10-30
Reports To Position Number	00007345	00006762

Lesson 3: Submitting Position Change

Lecture 1: Modify Position

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**. Once fully approved the Position Data as well as the employee’s Job Data is updated accordingly.

NOTE: Once position is approved, the DPR will receive notification that the requested position changes have taken effect.



Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

Validating the modification request affects the Position.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being modified**.
2. Select **Search**.

The position information is displayed.

3. Select the **position being validated**.

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00006777	CLERK 3	00007345	FR	MDC	FR00000000	Active	000012	1/1

Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

The **Position Details** page displays the position activities listed with the Effective Dates, Reason, and Approval Status.

Notice the recent request approved.

4. Select the **Greater Than (>) button** to see full details of the position.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
01/05/2022	0	Reports To Change	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	>
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain	>

The **View Position** page is displayed with the position details.

Notice the **Reason field, Approval Status field, and Reports to field** updated accordingly.

View Position

Position Number: 0006777
Headcount Status: Filled
Current Head Count: 1 of 1

Effective Date: 01/05/2022
Effective Sequence: 0
Reason: **RTC Reports To Change**
Approval Status: **Approved**

Position Information

Position Status: Approved
Status: Active
Action Date: 01/05/2022
Key Position: No
Budgeted Position: Yes
Senior Management: No

Max Head Count: 1
Status Date: 10/29/2014
Job Sharing Permitted: No
Non-Mayoral: No

Job Information

Business Unit: FR Fire Rescue
Job Code: 000012 Clerk 3
Regular/Temporary: Regular
Regular Shift: Not Applicable
Title: CLERK 3

Manager Level: All Other Positions
Full/Part Time: Full-Time
Union Code: K GSAF - OPEU Local 100
Short Title: CLERK 3
Description: NATURE OF WORK: This is supervisory clerical work or independent clerical work of

Work Location

Reg Region: USA United States
Department: FR00000000 FIRE DEPARTMENT
Location: FR00000056 9300 NW 41ST ST
Company: MDC Mam Dade County
Dot-Line:
Security Clearance:

Reports To: 00007345 CLERK 4 View Current Incumbents
Supervisor Lvl: 12 Supervisor Classes

Salary Plan Information

Pay Plan: Salary Admin Plan STEP
Standard Hours: 80.00
Work Period: B Biweekly

Grade: 75
Step:
Mon Tue Wed Thu Fri Sat Sun

- USA
- Specific Information
- Education and Government
- Budget and Incumbents
- Summary of Changes
- Attachments

Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

Once the Position Data has been validated, the next step is to validate the employee’s job data record. Users need to ensure the employee’s job data reflects the new reports to change as this will affect the reporting structure and processes such as Time & Absence Management and ePerformance Management.

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

Human Resources (HCM)

Job Information

- Job Data** (Selected)
- Workforce Job Summary
- Manage Employee Profile
- Headcount
- Labor Administration
- HR Configuration

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search

Search Criteria

Empl ID begins with []

Empl Record = []

Name begins with []

Last Name begins with []

Second Last Name begins with []

Alternate Character Name begins with []

Middle Name begins with []

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

The Employee’s Job Data record will be displayed.

4. Select the **Job Information** tab to see the reporting change.

Notice under **Job Information Details** the **Reports To** section now displays the employee’s **new immediate supervisor’s Position Number, Employee ID, and Name**.

The screenshot shows the 'Job Information Details' for employee Glinda King. Key fields are highlighted with red boxes:

- Job Information** tab is selected.
- Effective Date**: 01/05/2022
- Reports To**: 00007345 CLERK 4 00158740 Nola Foster
- Current** status indicator.

Other visible details include: Job Code 000012, Clerk 3, Supervisor ID 12, and Standard Hours of 80.00.

This concludes the Validating Modification Request process.

NOTE: Top of stack record will see current.

Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

When inactivating a position, it is important to ensure there are no incumbents in the position.

NOTE: For historical purposes, no fields in this process are to be modified except the Update Incumbents toggle in Budgeted Incumbents which is Step 4 of the process.

Navigate to Manage Position: Human Resources (HCM) > DPR Self-Service > Manage Position

1. In the Position Number field, enter the position number being inactivated.
2. Select Search.

The position information is displayed.

1. Select the **position being inactivated**.

NOTE: Ensure the Current Head Count is zero when deactivating a position

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00003294	MANAGER ITD ADMINISTRATIVE SER	00018431	IT	MDC	IT00000000	Active	001755	0/1

Lesson 3: Submitting Position Change

Lecture 2: Validating Modification Request

2. Select the **Plus Sign (+)** above the **Effective Date** to **modify the position with a new effective date**.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5880 SW 87 AVE	Approved	Approval Chain

The **Request Details** pop-up is displayed to enter the new effective date and select the modification reason.

3. In the ***Effective Date** field, enter the **new effective date**.
4. In the **Reason Code** field, select **INA (Position Inactivated)** as the reason.
5. Select **Continue**.

Request Details

*Effective Date: 01/05/2022

Effective Sequence: 0

Reason Code: INA (Position Inactivated)

Buttons: Cancel, Continue

The **Position Data** page (Step 1 of 5) will be displayed, and users will have to go through the 5 steps of Manage a Position to submit the request.

6. In the **Position Information** section, in the ***Status** field, select **Inactive**.

Step 1 of 5: Position Data

Effective Date: 01/05/2022
Effective Sequence: 0

Reason Code: INA Position Inactivated
Approval Status: Not Available

Position Information

*Filed Status: Approved

*Status: Inactive

Budgeted Position: Yes
Senior Management: No

Max Head Count: 1
Non-Mayoral: No

Lesson 3: Submitting Position Change

Lecture 3: Inactive Position

7. Review the requested modifications and select **Next**.

Manage Position

Position Number: 00003294
Headcount Status: Open
Current Head Count: 0 of 1

Step 1 of 5: Position Data

Effective Date: 01/05/2022
Effective Sequence: 0
Reason Code: INA Position Inactivated
Approval Status: Not Available

Position Information

*Filed Status: **Approved**
*Status: **Inactive** (highlighted in red)
Budgeted Position: Yes No
Senior Management: Yes No

Max Head Count:
Non-Mayoral: Yes No

Job Information

*Business Unit: IT Information Technology
*Job Code: 001755 Manager IS Administrative Svc
*Regular/Temporary: Regular
*Regular Shift: Not Applicable
*Title: MANAGER ITD ADMINISTRATIVE SER

*Full Part Time: Full-Time
Union Code: L Non Bargaining
Short Title: MORTDADIV
Description: MANAGER ITD ADMINISTRATIVE SER

Work Location

*Reg Region: USA United States
*Department: IT00000000 INFORMATION TECHNOLOGY DEPT
Location: ID00000705 5880 SW 87 AVE
Reports To: 00018431 DIV DIR ITD [View Current Incumbents](#)
Supervisor Level:

*Company: MDC Miami Dade County

Salary Plan Information

Salary Admin Plan: PAYG
Standard Hours: 80.00
Work Period: B Biweekly
Grade: 058
Step:

Next >

8. Review **Additional Information** page (Step 2 of 5) and select **Next**.

Manage Position

Position Number: 00003294
Headcount Status: Open
Current Head Count: 0 of 1

Step 2 of 5: Additional Information

Effective Date: 01/05/2022
Effective Sequence: 0
Reason Code: INA Position Inactivated
Approval Status: Not Available

Education and Government

*Pre-Encumbrance Indicator: Encumber Immediately
*Encumber Salary Option: Salary Step
*Classified Indicator: Classified

FTE:
Adds to FTE Actual Count: Yes No

< Previous **Next** >

Lesson 3: Submitting Position Change

Lecture 3:
Inactive
Position

Attachments for this process are required.

9. On the **Attachments** page (Step 3 of 5) attach any supporting documentation regarding the request.
10. Select **Attachment**.

11. Select **My Device**.
12. Select the **file being attached**.
13. Select **Upload**.
14. Select **Done**.
15. In the **Description** field, enter a **brief description of the supporting documentation**.
16. Select **Next**.

Attachments	Description	Attached By	Attached	Status
Deactivate_Position_00003294_(1-5-22).docx	Memo to Deactivate Position (1-5-22)	Xavier Washington	01/05/22 03:53:20 PM	Active

17. In the **Budget Incumbents** page (Step 4 of 5) in **Update Incumbents** field select **No**.
18. Select **Next**.

Lesson 3: Submitting Position Change

Lecture 3: Inactive Position

19. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.
20. Select **Submit** once the requested modifications are ready for processing.

Manage Position

Position Number: 00003294
Headcount Status: Open
Current Head Count: 0 of 1

Step 5 of 5: Review and Submit

Effective Date: 01/05/2022
Effective Sequence: 0

Reason Code: INA Position Inactivated
Approval Status: Not Available

Description	Proposed Value	Current Value
Status as of Effective Date	I	A
Reason Code	INA	CNV
Action Date	2022-01-10	2019-08-16
Update Incumbents	N	Y

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**. Once fully approved the Position Data is updated accordingly.

Position Confirmation

✔ The Position Number 00003294 has been successfully submitted for approval.

Modify Position Approval

Position Inactivated Pending

<p>Modify Position Approval</p> <p>⌚ Pending</p> <p>Multiple Approvers HR Central Position Approver</p>	>
--	---

Go to Position Details
Go to Manage/Create Position
Go to Position Management

This concludes the Inactive Position process.

Lesson 3: Submitting Position Change

Lecture 4: Validating Inactive Position

Validating the modification request affects the Position.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being inactivated**.
2. Select **Search**.

The position information is displayed.

3. Select the **position being validated**.

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00003294	MANAGER ITD ADMINISTRATIVE SER	00016431	IT	MDC	IT00000000	Inactive	001755	0/1

Lesson 3: Submitting Position Change

Lecture 4: Validating Inactive Position

The **Position Details** page displays the position activities listed with the Effective Dates, Reason, and Status.

Notice the recent request approved.

4. Select the **Greater Than (>) button** to see full details of the position.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
01/05/2022	0	Position Inactivated	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5600 SW 07 AVE	Approved	Approval Chain	>
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5600 SW 07 AVE	Approved	Approval Chain	>

The **View Position** page is displayed with the position details.

Notice the **Reason** field and the **Approval Status** field updated accordingly.

View Position

Position Number: 00003294
Headcount Status: Open
Current Head Count: 0 of 1

Effective Date: 01/05/2022
Effective Sequence: 0
Reason: INA Position Inactivated
Approval Status: Approved

Position Information

Position Status: Approved
Status: Inactive
Action Date: 01/05/2022
Key Position: No
Budgeted Position: Yes
Senior Management: No

Max Head Count: 1
Status Date: 03/01/2019
Job Sharing Permitted: No
Non-Mayoral: No

Job Information

Business Unit: IT
Job Code: 001755
Regular/Temporary: Regular
Regular Shift: Not Applicable
Title: MANAGER ITD ADMINISTRATIVE SER

Information Technology
Manager Itd Administrative Svc
Manager Level: All Other Positions
Full/Part Time: Full-Time
Union Code: L
Short Title: MGRITDADSV
Description: MANAGER ITD ADMINISTRATIVE SER

Work Location

Reg Region: USA
Department: IT00000090
Location: ID00000795
Reports To: 00018431
Supervisor Lvl:

United States
INFORMATION TECHNOLOGY DEPT
5600 SW 07 AVE
DIV DIR ITD View Current Incumbents

Company: MDC
Dot-Line
Security Clearance

Salary Plan Information

Pay Plan: Salary Admin Plan PKYG
Standard Hours: 80.00
Work Period: B

Grade: 053
Step: []
Mon Tue Wed Thu Fri Sat Sun
Biweekly

USA
Specific Information
Education and Government
Budget and Incumbents
Summary of Changes
Attachments

The position is successfully Inactivated, and this concludes the Validating Inactive Position process.

Lesson 3: Training Activity 1

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

Scenario DPR will be inactivating a position.

Instructions This activity is 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 3: Training Exercise

Debrief



1. When requesting a Reports to Change with current incumbents, the Update Incumbents toggle must be set to Yes. (True or False)

2. When inactivating a position, it is okay to have incumbents currently in the position? (True or False)

Lesson 3: Submitting Position Change

Lesson Summary



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

- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

Lesson 4: Submit Job Data Changes that Impact Benefits

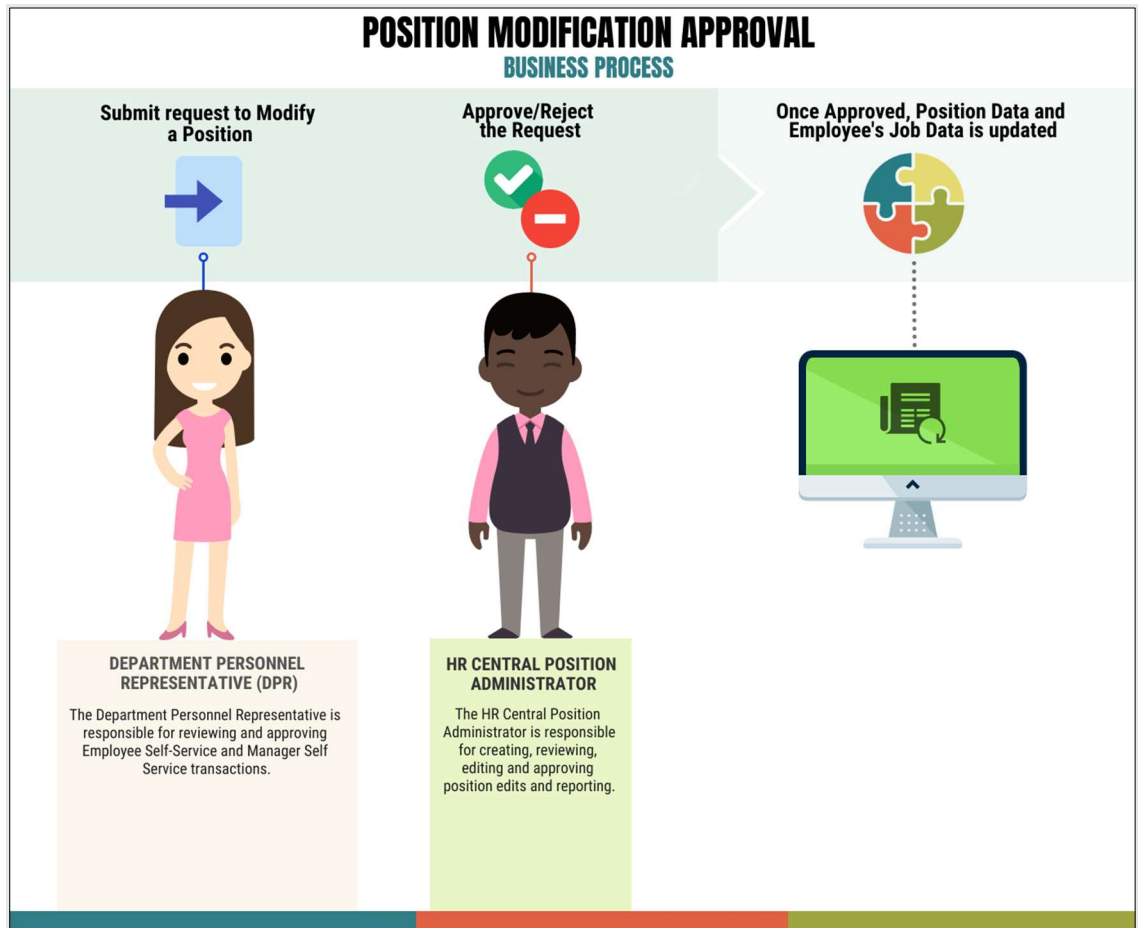
Lesson 4: Overview

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

- Update a temporary employee to regular status in order for them to obtain benefits

Lesson 4: Submit Job Data Changes that Impact Benefits

Lesson 4: Introduction



Lesson 4: Submit Job Data Changes that Impact Benefits

Key Terms



The following key terms are used in this module:

Term	Definition
N/A	

Lesson 4: Submit Job Data Changes that Impact Benefits

- Lecture 1: This lesson will review Submit Job Data Changes that Impact Benefits.
- Submit Job Data Changes that Impact Benefits
- Update a temporary employee to regular status in order for them to obtain benefits

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

This lesson will review how to submit job data changes that impact benefits. To make a position benefit eligible for a part-time/temporary employee, the initial process begins with modifying the position.

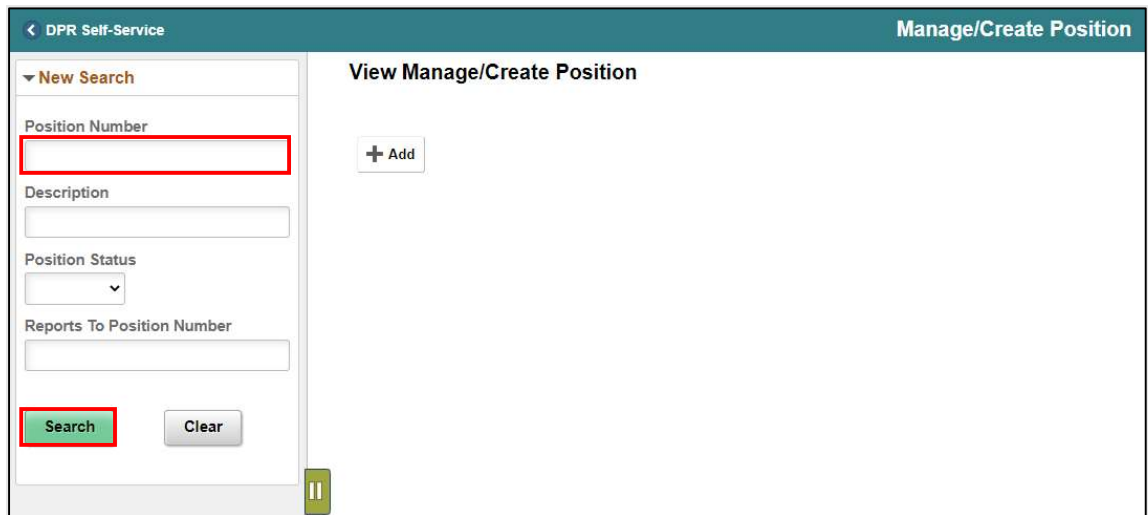
Modifications include:

- Modifying FTE
- Modifying the standard hours
- Changing it from temporary to regular

Once this process is complete, the position will be benefit eligible.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the part-time/temporary position number being modified**.
2. Select **Search**.



The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, under 'New Search', there are input fields for 'Position Number', 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. The 'Search' button is highlighted with a red box. On the right, under 'View Manage/Create Position', there is an '+ Add' button. The top right corner of the interface displays 'Manage/Create Position'.

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

The position information is displayed.

3. Select the **position being modified**.

The screenshot shows the 'View Manage/Create Position' interface. On the left is a search sidebar with filters for Position Number, Description, Position Status, Reports To Position Number, Business Unit, Company, Department, Status, and Job Code. The main area displays '1 results found' and a table with the following data:

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00021632	RECREATION LEADER	00010839	PR	MDC	PR00000000	Active	007301	1/1

4. Select the **Plus Sign (+)** above the **Effective Date** to **modify the position with a new effective date**.

The screenshot shows the 'Position Details' interface. At the top, it displays position information: Position Number 00021632, Headcount Status Filled, and Current Head Count 1 of 1. Below this is a table with the following data:

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Parks, Recreation & Open Spcs	PARKS, REC & OPEN SPACES	Recreation Leader	Hickman Building - PR	Approved	Approval Chain

A red box highlights the plus sign (+) icon above the Effective Date column header.

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

The **Request Details** pop-up is displayed to enter the new effective date and the **FTE (Change from Temp to Reg)** modification reason.

5. In the ***Effective Date**, enter the **new effective date**.
6. In the **Reason Code** field, select **FTE (Change from Temp to Reg)** as the reason.
7. Select **Continue**.

The **Position Data** page (Step 1 of 5) will be displayed, and users will have to go through the 5 steps of Manage a Position to complete the request.

8. In the **Job Information** section, in the ***Regular/Temporary** field, select **Regular** from the drop down.
9. In the ***Full/Part Time** field, select **Full-Time**.

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

10. Review the requested modifications and select **Next**.

Manage Position

Position Number: 00021632
Headcount Status: Filled
Current Head Count: 1 of 1

Step 1 of 5: Position Data

Effective Date: 01/24/2022
Effective Sequence: 0
Reason Code: FTE - Change from Temp to Reg
Approval Status: Not Available

Position Information

*Filed Status:
*Status:
Action Date: 01/25/2022
Key Position: No
Budgeted Position: No
Senior Management: No

Max Head Count:
Status Date: 07/13/2020
Job Sharing Permitted: No
Non-Mayoral: No

Job Information

*Business Unit: PR Parks, Recreation & Open Spcs
*Job Code: 007301 Recreation Leader
*Regular/Temporary:
*Regular Shift:
*Title: RECREATION LEADER

*Full/Part Time:
Union Code: H Local199 - General Employees
Short Title: RECLEADER
Description: NATURE OF WORK: This is specialized recreation work in planning.

Work Location

*Reg Region: USA United States
*Department: FR00000000 PARKS, REC & OPEN SPACES
Location: 050303000 Hickman Building - PR
Reports To: 00910839 RECREATION THERAPIST 2
Supervisor Level:

*Company: MDC Miami Dade County
Dot-Line:
Security Clearance:

Salary Plan Information

Salary Admin Plan: H
Standard Hours: 59.00
Work Period: B Biweekly
Grade: 037
Step:

Related Information

View Position
Position History

Next

11. In the **Additional Information** page (Step 2 of 5), in the **FTE** field, enter **1.00**.

NOTE: When changing a Part-Time position to Full-time it is necessary to adjust the FTE to 1.

12. Select **Next**.

Manage Position

Position Number: 00021632
Headcount Status: Filled
Current Head Count: 1 of 1

Step 2 of 5: Additional Information

Effective Date: 01/24/2022
Effective Sequence: 0
Reason Code: FTE - Change from Temp to Reg
Approval Status: Not Available

Education and Government

Position Pool ID:

*Pre-Encumbrance Indicator:
*Encumber Salary Option:
Encumber Salary Amount: 0.000
*Classified Indicator:

FTE:
Adds to FTE Actual Count: No

Related Information

View Position
Position History

Next

Attachments for this process are optional.

13. Review **Attachments** page (Step 3 of 5) and select **Next**.

Manage Position

Position Number: 00021632
Headcount Status: Filled
Current Head Count: 1 of 1

Step 3 of 5: Attachments

Effective Date: 01/24/2022
Effective Sequence: 0
Reason Code: FTE - Change from Temp to Reg
Approval Status: Not Available

Attachments

You have not added any Attachments.

Related Information

View Position
Position History

Next

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

14. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

Notice in the **Current Incumbents** section, the incumbent in the current position is listed as well as their current information.

15. Review **Budget Incumbents** page (Step 4 of 5) and select **Next**.

Step 4 of 5: Budget Incumbents

Effective Date: 01/24/2022
Reason Code: FTE Change from Temp to Reg
Effective Sequence: 0
Approval Status: Not Available

Current Budget

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

Incumbents

Update Incumbents: Yes No
 Include Salary Plan/Grade: No Yes
 Force Update for Title Changes: No Yes

Current Incumbents

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Kristy Hobbs	00312190	0	Part-Time	59.00	12/28/2020	Data Change	Conversion	N	Job Data

16. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly

17. Select **Submit** once the requested modifications are ready for processing.

Step 5 of 5: Review and Submit

Effective Date: 01/24/2022
Reason Code: FTE Change from Temp to Reg
Effective Sequence: 0
Approval Status: Not Available

Summary of Changes

Description	Proposed Value	Current Value
Reason Code	FTE	CNV
Action Date	2022-01-25	2020-07-28
Regular/Temporary	R	T
Full/Part Time	F	P
FTE	1	0

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**. Once fully approved the Position Data as well as the employee's Job Data is updated accordingly.

The screenshot displays the 'Position Confirmation' interface. At the top, a green banner contains a checkmark icon and the text: 'The Position Number 00021632 has been successfully submitted for approval.' Below this, the main content area is titled 'Modify Position Approval'. It features a dropdown menu set to 'Change from Temp to Reg' and a status indicator 'Pending'. A table with a red border highlights the approval details:

Modify Position Approval
Pending
Multiple Approvers HR Central Position Approver

At the bottom of the screen, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

Once the position modification has been approved and validated, the next step is to validate the employee’s job data record. Users need to ensure the employee’s job data reflects the position modifications such as the Regular/Temporary, Full/Part Hours, Standard Hours, and FTE status as this will affect the employee’s benefits.

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Job Data' search interface. On the left, a sidebar contains 'Job Information' (with 'Job Data' selected), 'Workforce Job Summary', 'Manage Employee Profile', 'Headcount', 'Labor Administration', and 'HR Configuration'. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (active) and 'Keyword Search'. Under 'Search Criteria', there are several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a text input field), 'Empl Record' (with a dropdown set to '=' and a text input field), 'Name' (with a dropdown set to 'begins with' and a text input field), 'Last Name' (with a dropdown set to 'begins with' and a text input field), 'Second Last Name' (with a dropdown set to 'begins with' and a text input field), 'Alternate Character Name' (with a dropdown set to 'begins with' and a text input field), and 'Middle Name' (with a dropdown set to 'begins with' and a text input field). There is also a 'Case Sensitive' checkbox. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

The Employee’s Job Data record will be displayed.

4. Select the **Job Information** tab to see the reporting change.

Notice under **Job Information Details** the **Regular/Temporary** section now displays the employee’s **new Regular status, Full-Time, Standard Hours, and new FTE**. **The employee is now eligible to receive benefits.**

Human Resources (HCM) | HR Administration

Job Information | Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Job Data
 Workforce Job Summary
 Manage Employee Profile

Headcount
Labor Administration
HR Configuration

Kristy Hobbs
 Employee | Empl ID 00312190
 Empl Record 0

Job Information Details | 1 of 2

Effective Date 01/24/2022 | **Go To Row**

Effective Sequence 1 | Action Position Change
 HR Status Active | Reason Change from Temp to Reg
 Payroll Status Active | Current

Job Code 007301 | Recreation Leader
 Entry Date 05/26/2020 | Non-Supervisory
 Supervisor Level 13

Reports To 00010839 | RECREATION THERAPIST 2 00310945 Isadora Garica
Regular/Temporary Regular | **Full/Part Full-Time**
 Empl Class Seasonal | *Protected Class SSN Protected Only
 Regular Shift Not Applicable
 Classified Ind Classified

Standard Hours

Standard Hours	80.00	Work Period	B	Biweekly
FTE	1.000000	<input type="checkbox"/> Adds to FTE Actual Count? <input type="checkbox"/> Encumbrance Override		

Contract Number
 Contract Type

USA

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

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

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lesson 4: Submit Job Data Changes that Impact Benefits

Lecture 1: Submit Job Data Changes that Impact Benefits

In order to change the EMPL class, a new row must be added.

5. Select the **Work Location** tab.
6. Select the **plus (+) sign** to add a new row.
7. Enter the **effective date** and select the appropriate **Action** and **Reason** from the dropdown menu.
8. Select **Save**.

Work Location Details

Employee: Kristy Hobbs, Empl ID: 00312190, Empl Record: 0

Effective Date: 01/24/2022

Effective Sequence: 1

HR Status: Active

Payroll Status: Active

Position Number: 00021632, RECREATION LEADER

Position Entry Date: 05/26/2020

Regulatory Region: USA, United States

Company: MDC, Miami Dade County

Business Unit: PR, Parks, Recreation & Open Spcs

Department: PR00000000, PARKS, REC & OPEN SPACES

Department Entry Date: 05/26/2020

Location: D5D3030000, Hickman Building - PR

Establishment ID: MDC, Miami Dade County

Date Created: 01/27/2022

Last Start Date: 05/26/2020

Expected Job End Date: [Blank]

9. Navigate back to the **Job Information** tab.
10. Select the appropriate **EMPL Class** from the dropdown menu.

Job Information Details

Employee: Kristy Hobbs, Empl ID: 00312190, Empl Record: 0

Effective Date: 01/24/2022

Effective Sequence: 3

HR Status: Active

Payroll Status: Leave With Pay

Action: Position Change

Reason: Change from Temp to Reg

Job Code: 007301, Recreation Leader

Entry Date: 05/26/2020

Supervisor Level: 13, Non-Supervisory

Reports To: 00010839, RECREATION THERAPIST 2 00310945 Isadora Garica

Regular/Temporary: Regular

Empl Class: Perm

Regular Shift: Not Applicable

Classified Ind: Classified

Protected Class: SSN Protected Only

Lesson 4: Training Activity 1

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

Scenario DPR will change an employee from part-time to full-time.

Instructions This activity is 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 4: Training Exercise

Debrief



1. Temporary employees are not eligible for benefits. TRUE or FALSE?

2. All position data changes are subject to approval before Job Data is updated. TRUE or FALSE?

Lesson 4: Submit Job Data Changes that Impact Benefits

Lesson Summary

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

- Update a temporary employee to regular status in order for them to obtain benefits



Lesson 5: Submitting HR Transaction

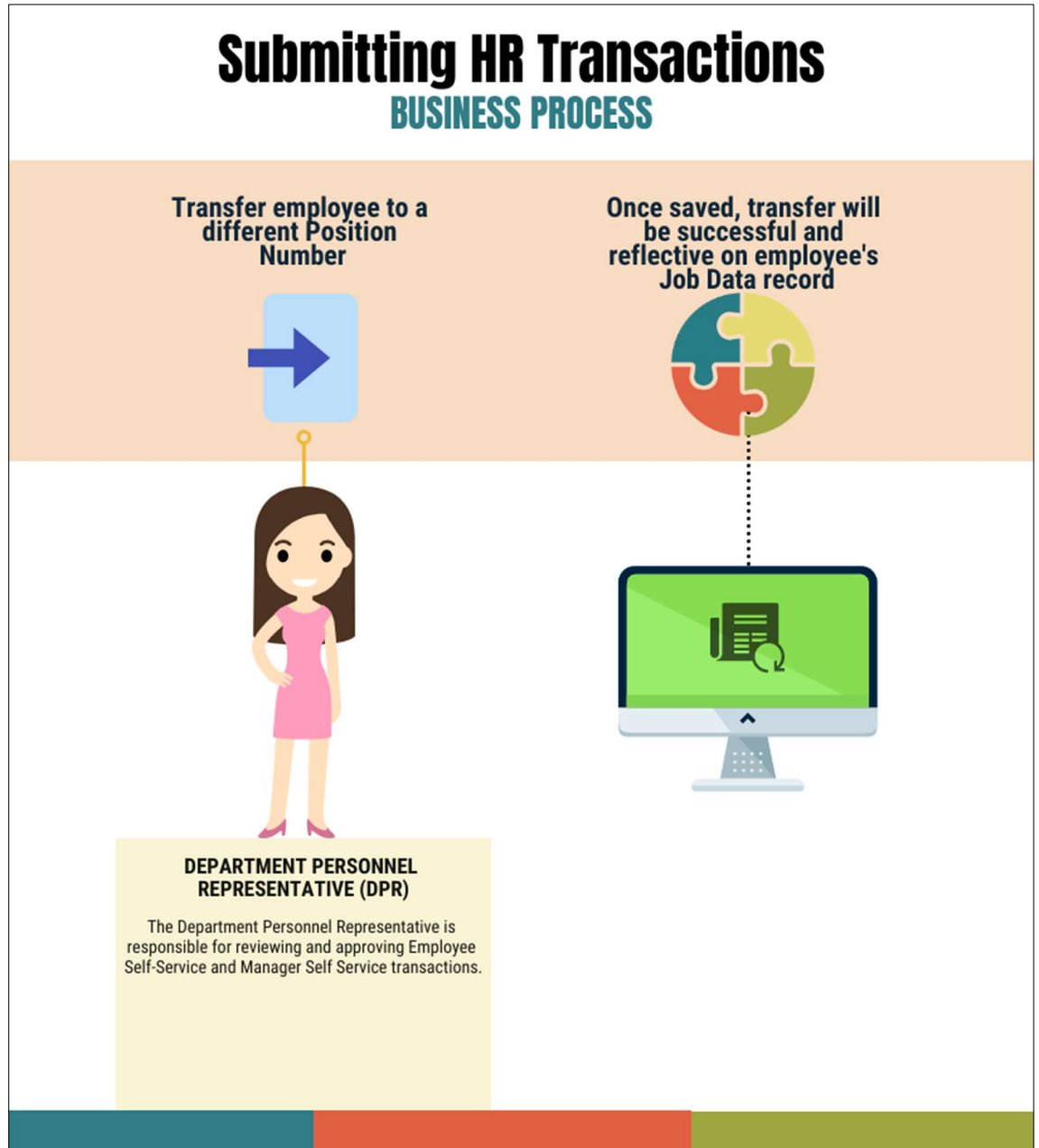
Lesson 5: Overview

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

- Successfully transfer employees to another Position Number.
- Verify the transfer within the Job Data.

Lesson 5: Submitting HR Transaction

Lesson 5: Introduction



Lesson 5: Submitting HR Transaction

Key Terms



The following key terms are used in this module:

Term	Definition
N/A	

Lesson 5: Submitting HR Transaction

- Lesson 5:
Submitting HR
Transaction
- This lesson will review Submitting HR Transaction.
- Transfer employee to a lateral position.

Lesson 5: Submitting HR Transaction

Lecture 1: Transfer Employee to a Position (Lateral)

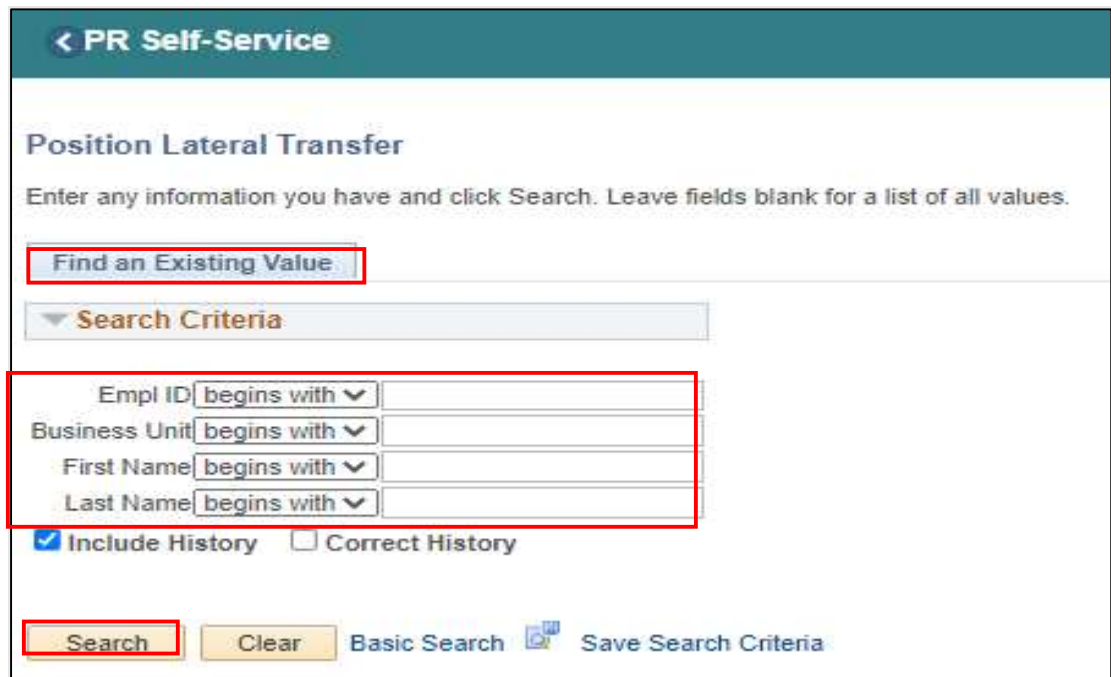
Transfer Employee to a different Position Number (Lateral) – will allow you to transfer the employee within the same Department and Job Code to a different Position within your Business Unit (exclusively).

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

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

On the **Position Lateral Transfer** page under **Find an Existing Value:**

1. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
2. In the **Business Unit** field, enter the **Business Unit**.
3. In the **First Name** field, enter the **employee's first name**.
4. In the **Last Name** field, enter the **employee's last name**.
5. Select **Search**.



< PR Self-Service

Position Lateral Transfer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria


Empl ID

Business Unit

First Name

Last Name

Include History Correct History

Search [Basic Search](#)  [Save Search Criteria](#)

Lesson 5: Submitting HR Transaction

Lecture 1:
Transfer
Employee to a
Position
(Lateral)

The employee’s current information will be displayed.

PR Self-Service

Mdc Empl Posn

Empl ID 00026999
 Name Mayra Beltran
 Business Unit HR Human Resources
 Department HR01020000 RECRUITMENT
 Position Number 00003260 HR PERSONNEL SERVICES SPEC
 Latest Effective Date 12/28/2020

Employee Position Data Find First 1 of 1 Last

Effective Date	11/16/2021	Seq	0
Action	XFR	Transfer	
*Position Number	00003262		

Save Return to Search Previous in List Next in List Notify Update/Display Include History Correct History

6. In the **Effective Date** field, enter the **Effective Date of the Transfer**.
7. In the ***Position Number** field, enter the ***Position Number you wish to transfer the employee to**.
8. Select **Save**.

Notice the employee was transferred from **Position #00003260 to Position #00003262**.

PR Self-Service

Mdc Empl Posn

Empl ID 00026999
 Name Mayra Beltran
 Business Unit HR Human Resources
 Department HR01020000 RECRUITMENT
 Position Number 00003262 HR PERSONNEL SERVICES SPEC
 Latest Effective Date 11/16/2021

Employee Position Data Find First 1-2 of 2 Last

Effective Date	11/16/2021	Seq	1
Action	XFR	Transfer	
*Position Number			
Effective Date	11/16/2021	Seq	0
Action	XFR	Transfer	
Position Number	00003262		HR PERSONNEL SERVICES SPEC

Lesson 5: Submitting HR Transaction

Lecture 2:
Verify
Employee
Transfer
(Lateral)

Verifying the Employee’s Transfer (Lateral).

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data.**

11. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number.**

12. Select **Search.**

Human Resources (HCM)

Job Information

- Job Data
 - Workforce Job Summary
 - Manage Employee Profile
- Headcount
- Labor Administration
- HR Configuration

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search

Search Criteria

Empl ID begins with []

Empl Record = []

Name begins with []

Last Name begins with []

Second Last Name begins with []

Alternate Character Name begins with []

Middle Name begins with []

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Transfer successful. The employee’s recent record is displayed (**Record 1 of 4**) with the recent Transfer effective of **11/16/2021**.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Mayra Beltran Employee | Empl ID 00026999 | Empl Record 0

Work Location Details (of 4 records)

Effective Date	11/16/2021	Action	Transfer	Reason	
Effective Sequence	0				
HR Status	Active				
Payroll Status	Active				
Position Number	00003262				HR PERSONNEL SERVICES SPEC
Position Entry Date	11/16/2021				
Regulatory Region	USA				United States
Company	MDC				Miami Dade County
Business Unit	HR				Human Resources
Department	HR01020000				RECRUITMENT
Department Entry Date	10/28/1996				
Location	ID00000140				111 NW 1ST ST
Establishment ID	MDC				Miami Dade County
Last Start Date	10/28/1996				
Expected Job End Date					

Date Created: 11/16/2021

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

Save | Return to Search | Notify | Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lesson 5: Training Activity 1

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

Scenario DPR will transfer employee to a lateral position.

Instructions This activity is 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 5: Training Exercise

Debrief



1. Can a DPR transfer an employee to a lateral position in a different department?

Lesson 5: Submitting HR Transaction

Lesson Summary



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

- Successfully transfer employees to another Position Number.
- Verify the transfer within the Job Data.

Lesson 6: Submitting HR Salary Changes

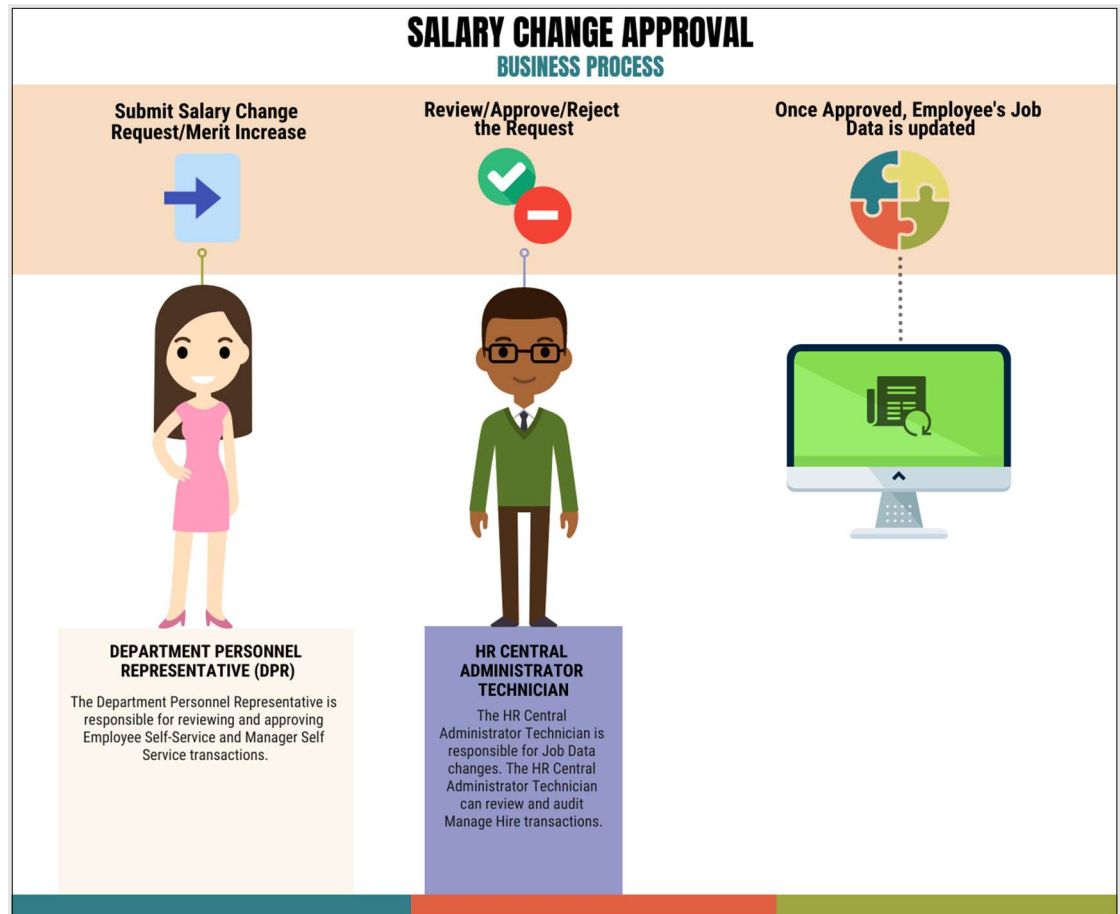
Lesson 6: Overview

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

- Request Merit Increase for Salary Grade Employee
- Request Merit Increase for Salary Step Employee
- Request Component of Pay
- Request License/Certification

Lesson 6: Submitting HR Salary Changes

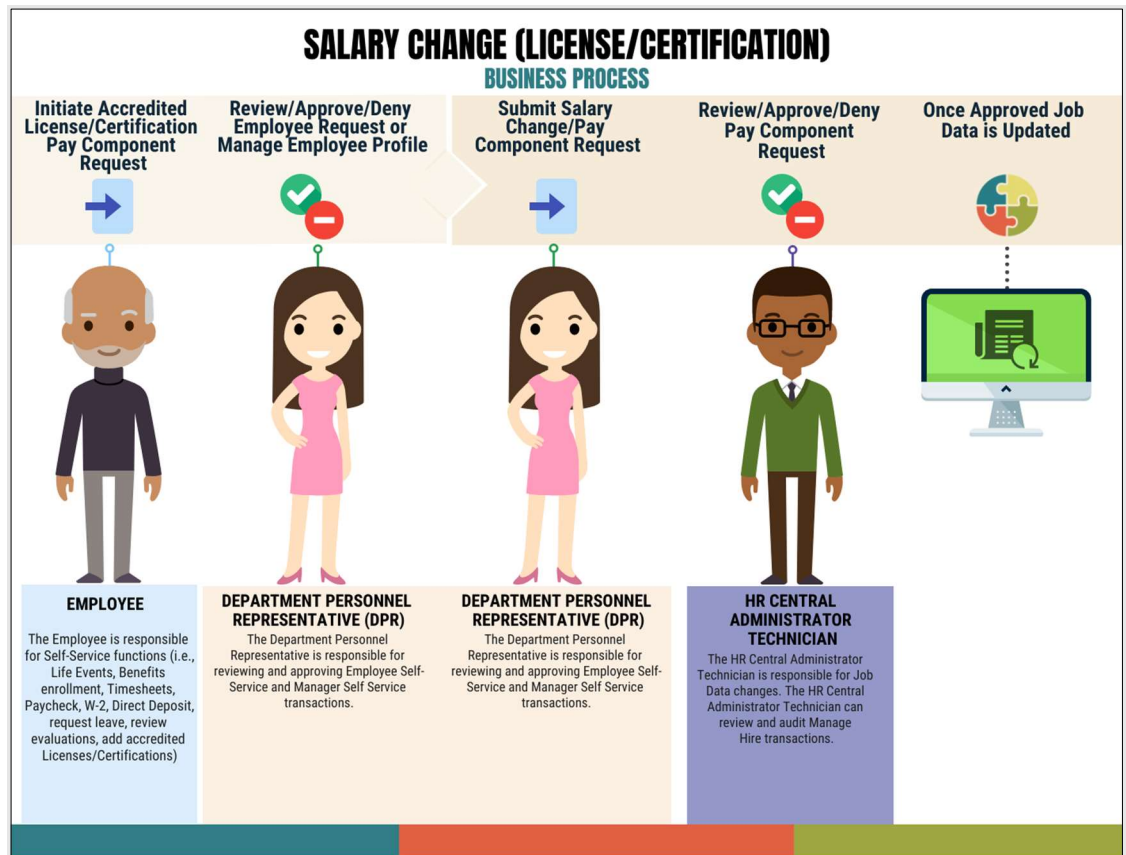
Lesson 6: Introduction



The Department Personnel Representative (DPR) is responsible for requesting Salary Changes such as merit increases once evaluations have been fully reviewed and approved. The HR Central Administrator Technician will review and approve or deny the Salary Change request. Once approved, the employee’s job data is updated.

Lesson 6: Submitting HR Salary Changes

Lesson 6: Introduction



Once an employee has received an accredited License or Certification related to their classification, they will add the information via Employee Profile the Department Personnel Representative (DPR) will then review and approve this request. Once fully approved the DPR is responsible for requesting Salary Changes for License/Certifications. The HR Central Administrator Technician will review and approve or deny the Salary Change request. Once approved, the employee’s job data is updated.

Lesson 6: Submitting HR Salary Changes

Key Terms



The following key terms are used in this module:

Term	Definition
Components of Pay	Additional elements of pay added to the employees pay. They can be added or taken away based on operational need. The legacy term is pay exception.

Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

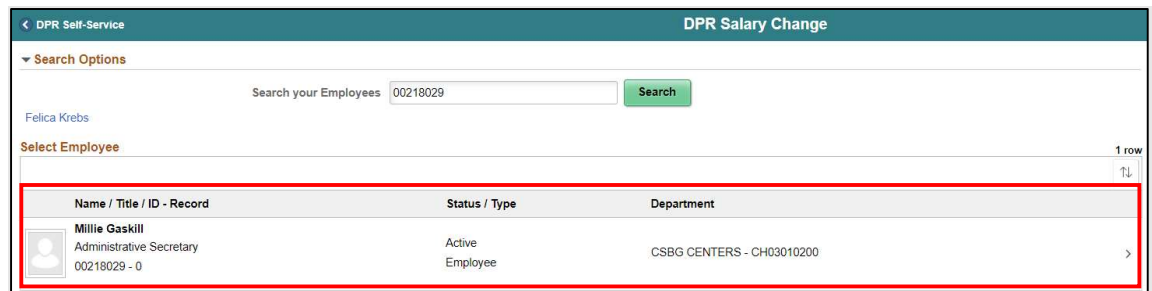
Submitting Merit Increase for a Salary Grade employee.

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

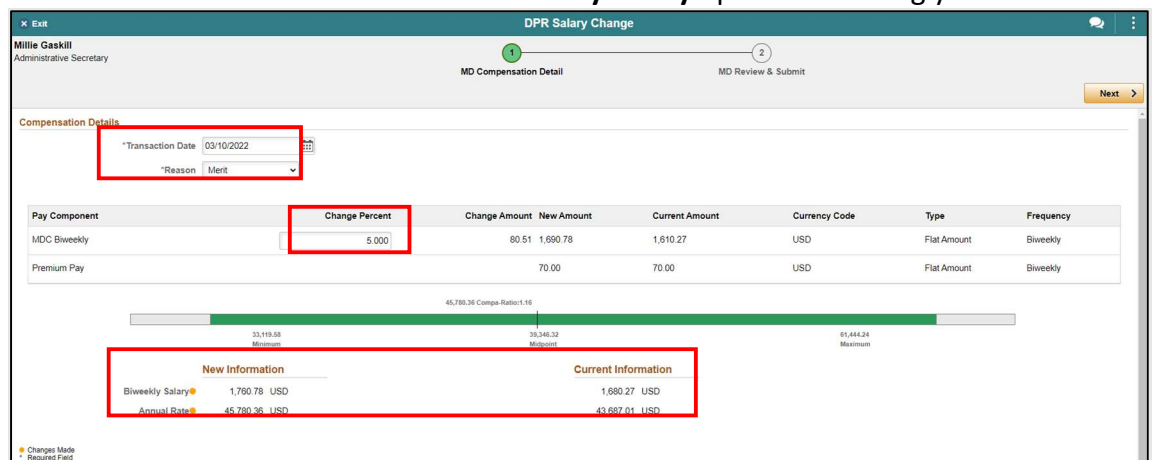
1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter either the **Employee’s Name or Employee ID #**.
3. Select **Search**.



4. Select the **Employee’s Record**.



5. Under the **Compensation Details** section, in the ***Transaction Date** field enter the **effective date of the merit request**.
6. In the ***Reason** field select **Merit**.
7. In the **Change Percent** field enter the **merit increase in decimal form**.
8. **Tab** to see the **New Information Biweekly Salary** update accordingly.



Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

9. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate.
- Notice within the **Pay Components** Section, the **MDBKLY** rate adjusts accordingly. This is the employee's new Biweekly rate.
10. Select **Calculate Compensation**.
11. Select **Next**.

Compensation Details

*Transaction Date: 03/10/2022
 *Reason: Merit

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly	5.000	80.51	1,890.78	1,810.27	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

New Information

Biweekly Salary: 1,760.78 USD
 Annual Rate: 45,780.36 USD

Current Information

Biweekly Salary: 1,680.27 USD
 Annual Rate: 43,687.01 USD

Salary Plan

Salary Admin Plan: K
 Salary Grade: A01
 Grade Entry Date: 02/28/2007

Default Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 MDBKLY	0	1,890.78/USD	B			
2 PRIPAY	0	70.00/USD	B			

Calculate Compensation

Review the adjustments accordingly. Notice the **Transaction Date, Reason**, and the **New Information Biweekly Salary** versus the **Current Information Biweekly Salary**.

12. In the **Comments** section enter the action requested or details. (Optional) Select **Add Attachment** to add any supporting documents.
13. Select **Submit** once ready for processing.

Review and Submit

Transaction Date: 03/10/2022
 Reason: Merit

New Information

Biweekly Salary: 1,760.78 USD
 Annual Rate: 45,780.36 USD

Current Information

Biweekly Salary: 1,680.27 USD
 Annual Rate: 43,687.01 USD

Comments

Requesting 5% Merit Increase effective 3/10/2022

Attachments

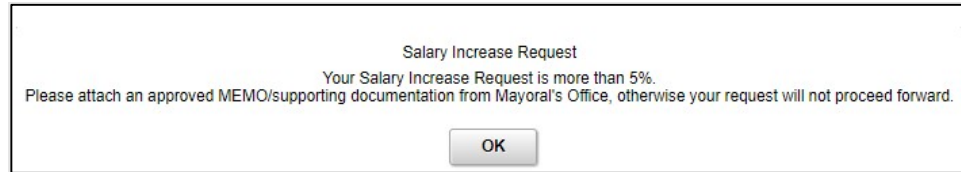
No documents have been attached.

Add Attachment

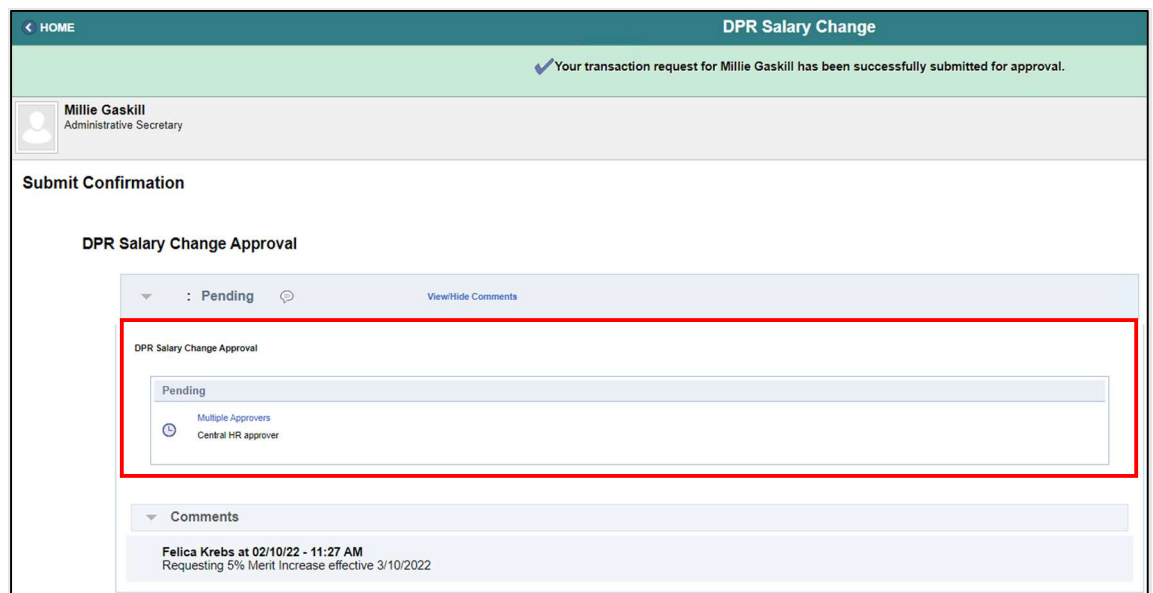
Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

NOTE: If the merit increase is more than 5% you will receive the following message. When requesting more than 5% merit increase, authorized documentation must be attached to the salary request before selecting the Submit button.



The DPR Salary Change conformation is displayed pending the approval of Central HR.



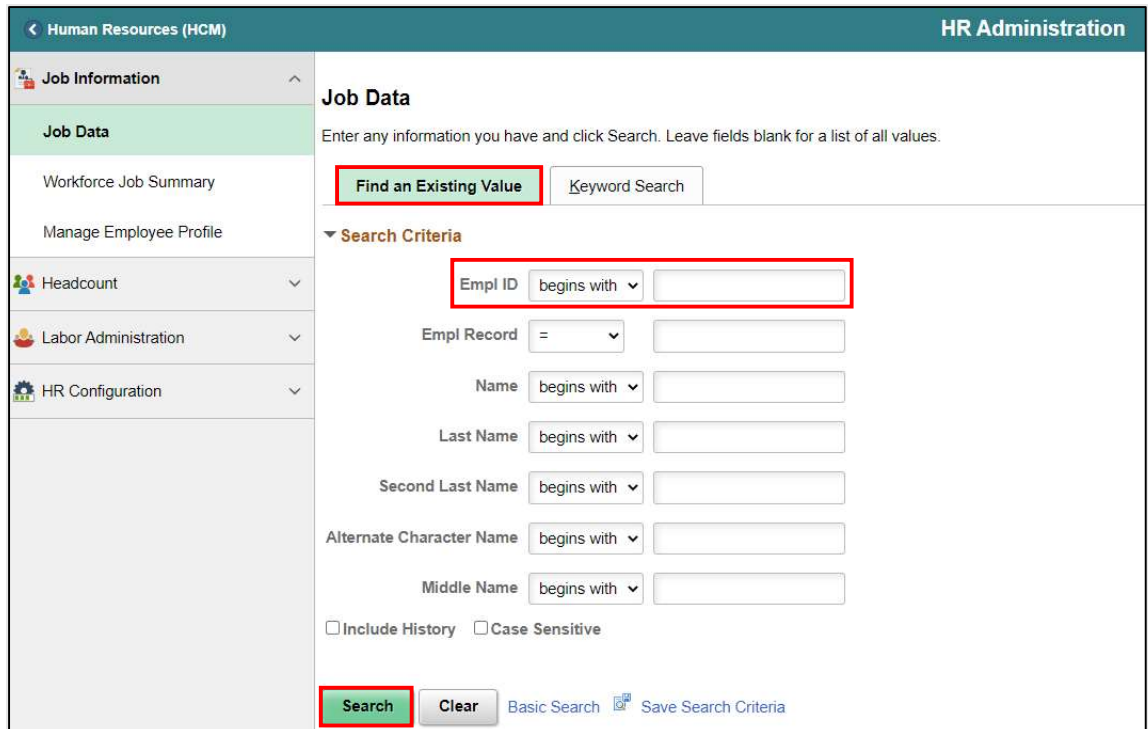
Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

Once Central HR has approved the merit increase request, users can verify the merit increase via the employee's Job Data.

Navigate to Job Data: **Human Resources (HCM) > HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.



The screenshot shows the 'Job Data' search interface in the HR Administration section. The left sidebar contains navigation options: Job Information (expanded), Job Data (selected), Workforce Job Summary, Manage Employee Profile, Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted in red) and 'Keyword Search'. Below the tabs is a 'Search Criteria' section with several search fields: 'Empl ID' (highlighted in red), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name'. Each field has a 'begins with' dropdown menu and an input box. At the bottom, there are checkboxes for 'Include History' and 'Case Sensitive', and a 'Search' button (highlighted in red) next to a 'Clear' button. There are also links for 'Basic Search' and 'Save Search Criteria'.

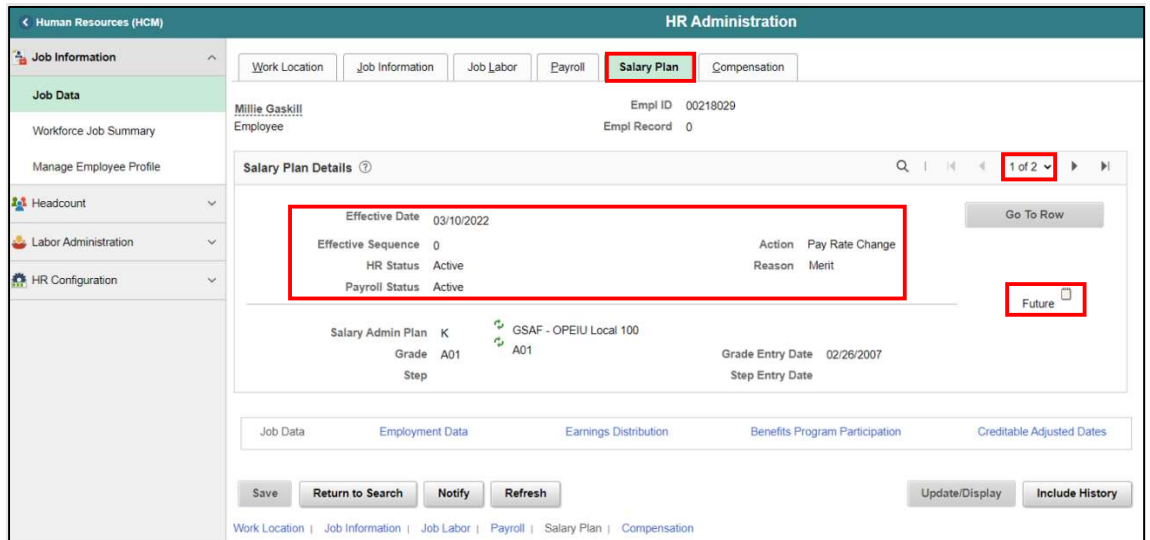
Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

The employee’s job data record is displayed with the recent record first. Notice the employee has two records **1 of 2**.

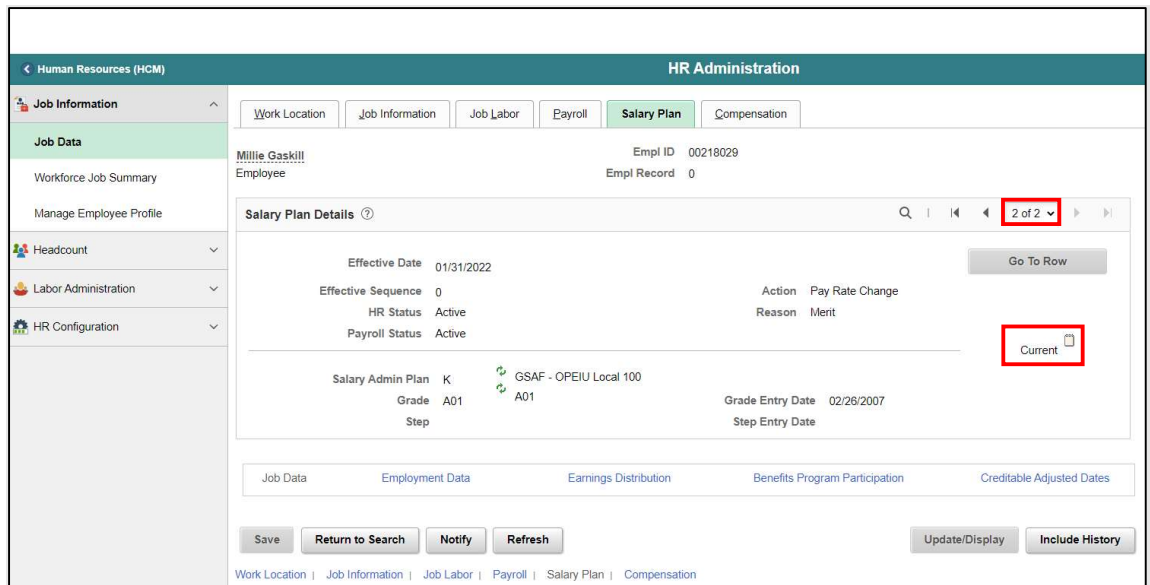
4. Select the **Salary Plan** tab.

Notice the employee’s new Merit with the Effective Date. The record reads **Future** as the request was future dated if the request was current, it would read as **Current**.



Page **2 of 2** is the previous Pay Rate Change.

Notice the word **Current** on the page once the merit takes affect this will read as **History** for historical information.



Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

The **Compensation** page displays the Compensation Rate listed.

5. Select the **Compensation** tab to see the Compensation Details between Record 1 and Record 2.

Displayed below is the **Effective Date, Action, Reason,** and the **new Compensation Rate** for the **Future** record.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Millie Gaskill Employee | Empl ID 00218029 | Empl Record 0

Compensation Details 1 of 2

Effective Date: 03/10/2022

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Pay Rate Change

Reason: Merit

Future

Compensation Rate: 1,760.78 USD | Frequency: B Biweekly

Comparative Information

Pay Rates

Default Pay Components | Contract Change Prorate Option

Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,690.782975	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

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

Lesson 6: Submitting HR Salary Changes

Lecture 1: Merit Increase (Salary Grade)

Record **2 of 2**

Displayed below is the **Effective Date, Action, Reason,** and the previous **Compensation Rate** for the **Current** record.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Millie Gaskill
Employee
Empl ID 00218029
Empl Record 0

Compensation Details ?
2 of 2

Effective Date 01/31/2022

Action Pay Rate Change
Reason Merit

Go To Row

Compensation Rate 1,680.27 USD

Frequency B Biweekly

Current

▶ Comparative Information ?

▶ Pay Rates ?

Default Pay Components

Contract Change Prorate Option

Pay Components ?

Amounts

Controls

Changes

Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

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

Lesson 6: Submitting HR Salary Changes

Lecture 2: Merit Increase (Salary Step)

Submitting Merit Increase for a Salary Step.

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter **Employee Name or Employee ID #**.
3. Select **Search**.

4. Select the **Employee's Record**.

Name / Title / ID - Record	Status / Type	Department
Ofir Doty Police Records Tech 3 00014872 - 0	Active Employee	CENTRAL RECORDS - PERSONNEL - PD03120100

5. Under **Compensation Details**, in the ***Transaction Date** field enter the **effective date of the Merit**.
6. In the ***Reason** field select **Merit**.
7. Under the **Salary Plan** section, select the next **Step**.

Compensation Details

*Transaction Date: 01/31/2022
 *Reason: Merit

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,057.74	2,057.74	USD	Flat Amount	Biweekly
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly

Salary Plan

Salary Admin Plan: K
 Salary Grade: 035
 Grade Entry Date: 01/31/1994
 Step: 10
 Step Entry Date: 01/31/2022

Lesson 6: Submitting HR Salary Changes

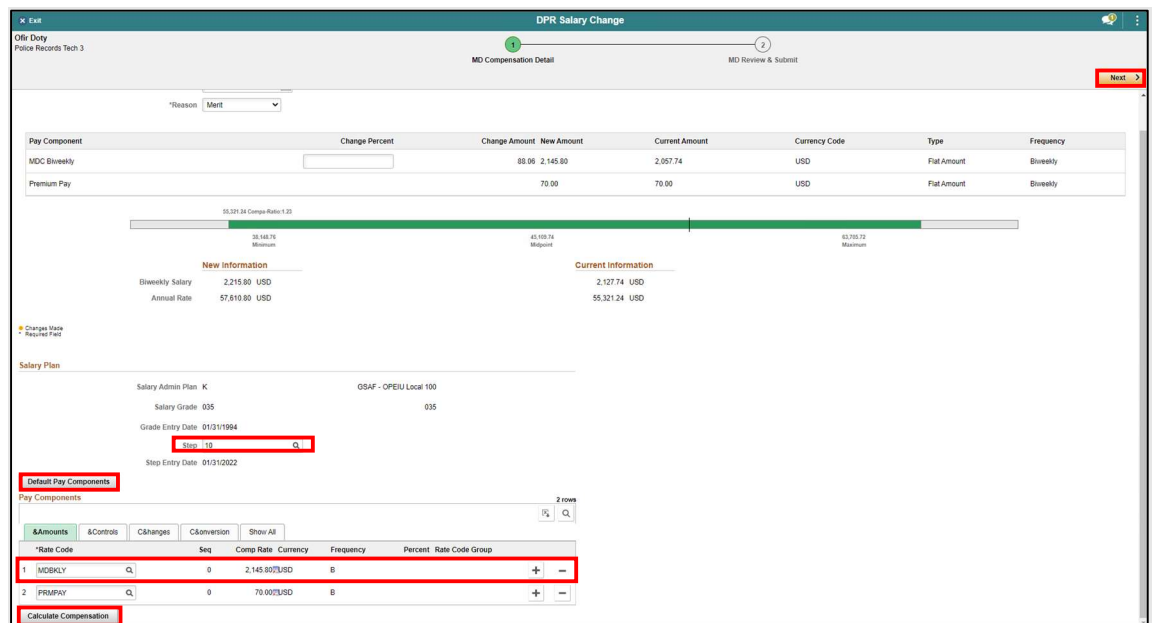
Lecture 2: Merit Increase (Salary Step)

8. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate.

Notice within the **Pay Components** Section, the **MDBKLY** rate adjusted accordingly. This is the employee's new Biweekly rate.

9. Select **Calculate Compensation**

10. Select **Next**.

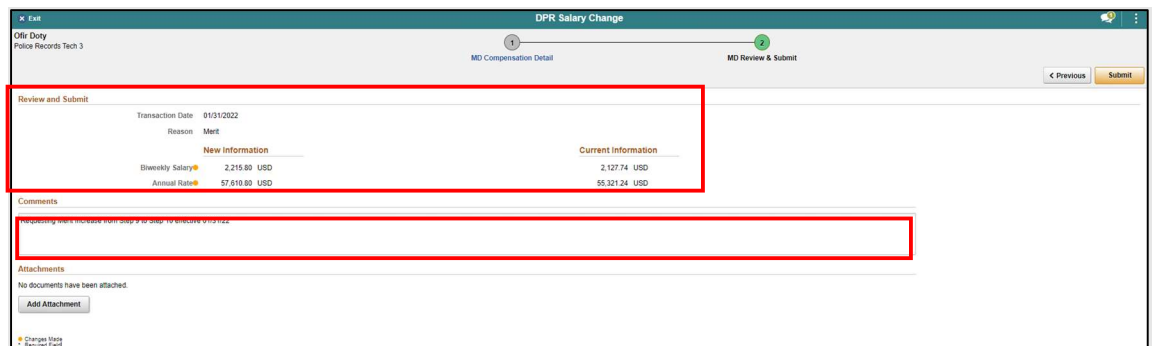


Review the adjustments accordingly. Notice the **Transaction Date, Reason, and the New Information Biweekly Salary versus the Current Information Biweekly Salary** regarding the **Biweekly Salary**.

11. In the **Comments** section enter a brief description of the request.

(Optional) Select **Add Attachment** to add any documents.

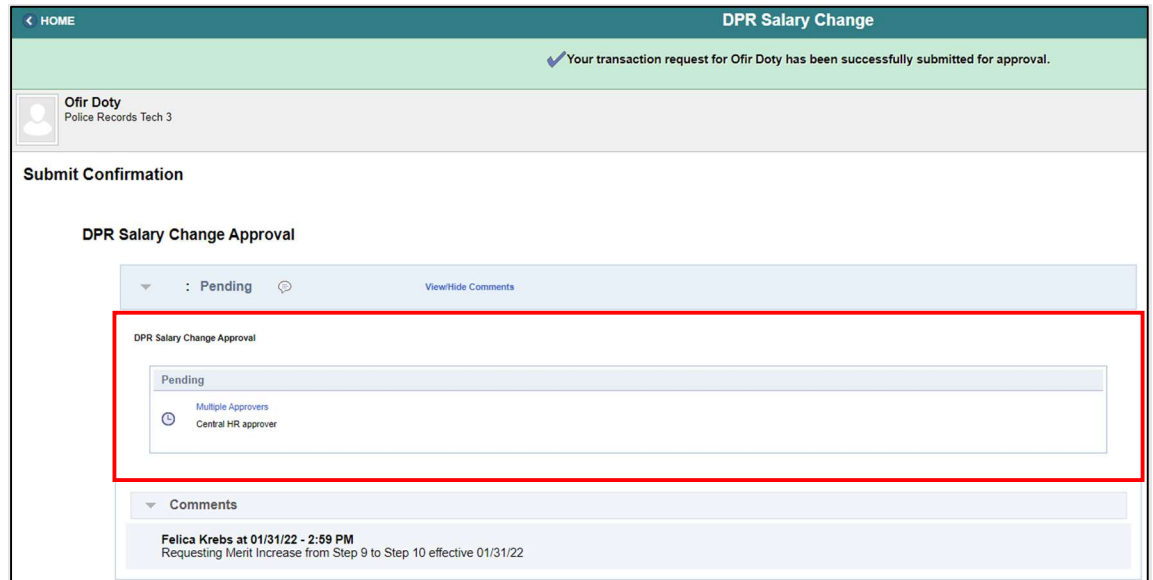
12. Select **Submit** once ready for processing.



Lesson 6: Submitting HR Salary Changes

Lecture 2: Merit Increase (Salary Step)

DPR Request HR Salary Change confirmation page is display and the request is now pending the approval by Central HR.



Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

Requesting Pay Components (Pay Supplements)

The Mayor, at his/her discretion, may change or eliminate any pay supplement designated for non-bargaining unit classified and exempt employees under his/her purview.

Special allowances are provided for employees as described in the Pay Plan after approval by the Department Director and the Human Resources Department, or as otherwise designated. It is the responsibility of the concerned department to monitor employees' eligibility for salary supplements and to advise them of the required procedure to obtain supplemental payments. Unless otherwise specified by the terms of a Collective Bargaining Agreement, employees will become eligible for salary supplements effective the beginning of the next pay period following the receipt of all required documentation by the Human Resources Department.

An eligible employee in a classification assigned to a pay grade or non-step salary range may receive a pay supplement. The value of a one-step pay supplement is 5%.

Pay Supplements are additional components of pay which are added to an employee's base pay. The types of pay supplements may be in the form of a step increase (1-3 steps), percent, or flat biweekly dollar amount. The calculation of base pay plus supplements is defined as the employee's Compensation Rate. The compensation hourly rate is the rate used to pay all regular and overtime hours.

Eligibility for supplements may be subject to review and approval by the respective Department Director and the Human Resources Department. Employees will become eligible for certification supplements effective the beginning of the first pay period immediately following the receipt of all the required competency milestones.”

Within the Pay Components section of the Salary Changes page, DPRs can add or remove components of pay such as Leadworker, Night Differential, Licenses & Certifications, Premium Pay, Special Allowance, etc.

Lesson 6: Submitting HR Salary Changes


Lecture 3: Pay Components (Pay Supplements)

Requesting pay components for an employee.

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter **Employee ID, Employee Name, or Classification**.
3. Select **Search**.

4. Select the **Employee's Record**.

Name / Title / ID - Record	Status / Type	Department
 Georgie Looper Fire Lieutenant 00197376 - 0	Active Employee	SOUTH AREA COMMAND - FR03010200

Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

5. Under **Compensation Details**, in the ***Transaction Date** field enter the **effective Date of the pay component**.
6. In ***Reason** field select **Components of Pay**.

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Education Incentive Pay			155.78	155.78	USD	Flat Amount	Biweekly
Fire - B A			50.77	50.77	USD	Flat Amount	Biweekly
Fire Paramedic (Protocol Cert)			24.000	24.000	%	Percent	Biweekly
Fire Hazardous			125.00	125.00	USD	Flat Amount	Biweekly
MDC Biweekly			3,256.87	3,256.87	USD	Flat Amount	Biweekly

Salary Scale: 57,019.04 (Minimum) - 65,152.14 (Midpoint) - 69,725.99 (Maximum). Current Rate: 114,593.86 (Compa-Ratio: 1.63)

New Information: Biweekly Salary 4,407.46 USD, Annual Rate 114,593.86 USD
 Current Information: Biweekly Salary 4,407.46 USD, Annual Rate 114,593.86 USD

13. Scroll down to the **Pay Components** Section.
14. Select the **Plus (+) sign** on the right side to add a new row.
15. On the ***Rate Code** column of the newly added row, select the **magnifying glass** for a list of available Pay Components.

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group	
EDINCP	0	155.78	USD	B			+ -
	1						+ -
FIRBA	0	50.77	USD	B			+ -
FIRPRM	0	819.04	USD	B	24.000	MDCMAX	+ -
HZDFIR	0	125.00	USD	B			+ -
MDBKLY	0	3,256.87	USD	B			+ -

Buttons: &Amounts, &Controls, C&hanges, C&onversion, Show All

Calculate Compensation

Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

An available list of **Pay Components** related to the Classification is displayed. This pop-up displays all of the available **Comp Rate Codes** based on their respective Bargaining Agreement and Classification with their respective **Description, Rate Code Type, and Rate Code Class** listed.

16. Select **LEAD** for Leadworker.

Comp Rate Code	Description	Comp Base Pay Switch	Rate Code Type	Rate Code Class
FRRSCN	Fire Rescue Response - Non-Emt	Y	Percent	PERCEN
FRSFTY	Fire Safety Bureau Personnel	Y	Flat Amount	1STEP
HFSTP	Half Step	Y	Flat Amount	HLFSTP
HNRGRD	Honor Guard	Y	Flat Amount	FLAT
HZDFIR	Fire Hazardous	Y	Flat Amount	FLAT
HZRDFR	Hazardous Materials - Fire	Y	Flat Amount	1STEP
HZSP	Hazmat Specialist - Fire	Y	Flat Amount	1STEP
INSTC	State Cert.Instrctr - Training	Y	Percent	PERCEN
LEAD	Leadworker	Y	Flat Amount	1STEP
LOGIS	Logistical Services - Fire	Y	Flat Amount	1STEP

17. Select **Default Pay Components**.

18. Select **Calculate Compensation**.

Notice the LEAD (Leadworker) supplemental pay added to the Pay Components section.

19. Select **Next**.

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
EDINCP	0	155.777USD	B			
FIRBA	0	50.777USD	B			
FIRPRM	0	956.427USD	B	24,000	MDCMAX	
LEAD	0	155.777USD	B			
IMDBKLY	0	3,256.877USD	B			

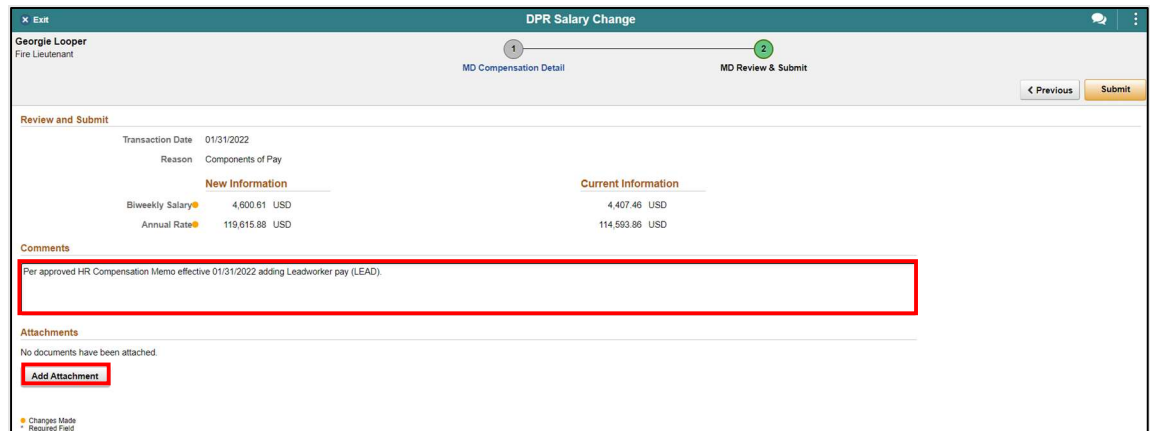
Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

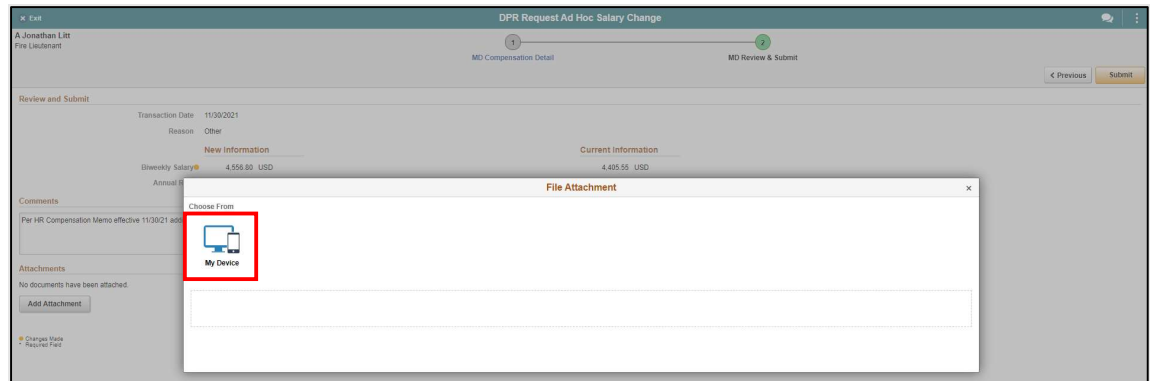
20. In the **Comments** section, enter a brief description of the request.

NOTE: Approved HR Compensation Memorandums are required when adding some Components of Pay.

21. Select **Add Attachment** to add the authorized Compensation Memo granting the employee the components of pay.



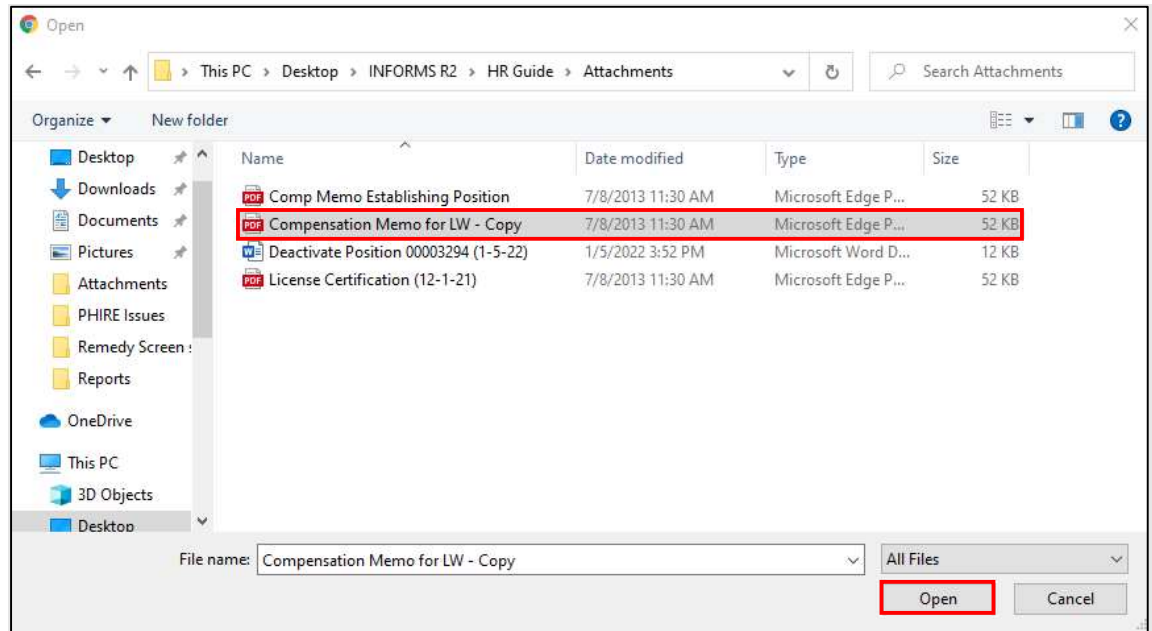
22. Select **My Device**.



Lesson 6: Submitting HR Salary Changes

Lecture 3: Pay Components (Pay Supplements)

- 23. Locate and select the documentation.
- 24. Select **Open**.



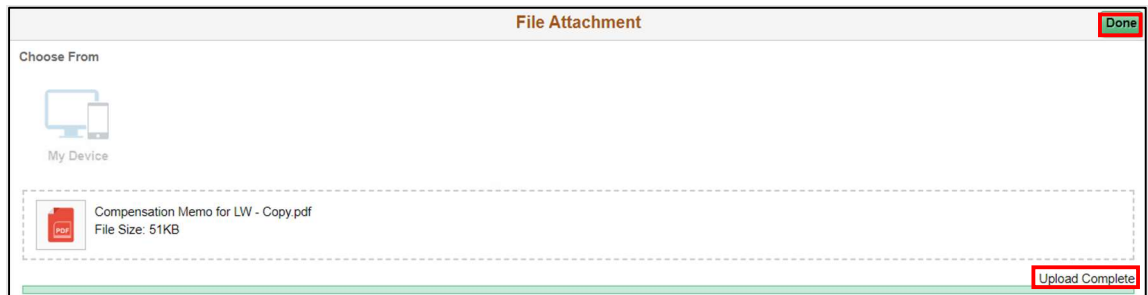
- 25. Select **Upload**.



Lesson 6: Submitting HR Salary Changes

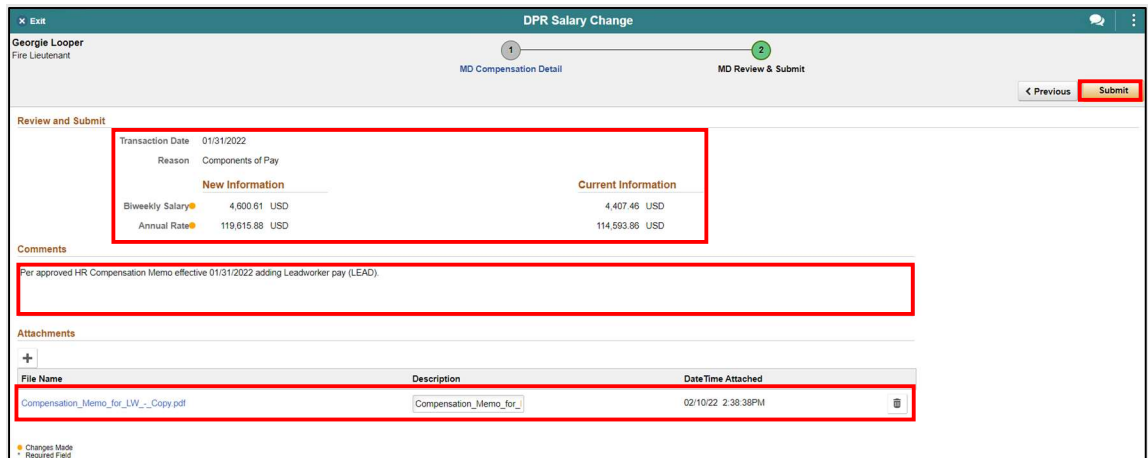
Lecture 3: Pay Components (Pay Supplements)

26. Once the upload is complete, select **Done**.

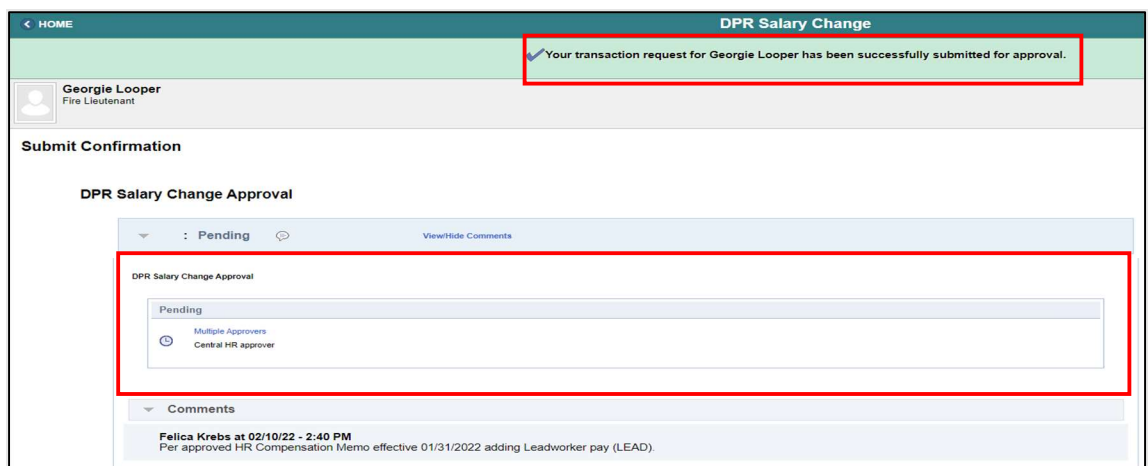


27. Review the adjustments accordingly. Notice the **Transaction Date, Reason, the New Biweekly Salary Information versus the Current Information Biweekly Salary Information, Comments, and Attachments**.

28. Select **Submit** once ready to submit the request.



The DPR Salary Change Request has been successfully submitted and pending approval by Central HR.



Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

The employee can submit a request to add a License or Certification via Employee Self Service. The DPR will then review and ensure all proper, active documents are enclosed and request the salary change to add the License/Certification pay.

NOTE: If for some reason the employee is not able or have access to submit the request via Employee Self Service, the employee’s manager or the DPR must manually enter the submission via Manage Employee Profile first before submitting a Salary Change Request.

The following is the manual **Manage Employee Profile** entry process where the DPR can add the License/Certification to the employee’s profile to later submit the Salary Change Request.

Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile**

1. Select **Find an Existing Value** tab.
2. In the **Empl ID** field enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Person Profiles' search interface in the HR Administration system. The left sidebar contains a navigation menu with 'Manage Employee Profile' highlighted in green. The main content area has a 'Find an Existing Value' button highlighted in red. Below this, the 'Search Criteria' section includes several search fields: 'Empl ID' (highlighted in red), 'Profile Type', 'Name', 'Last Name', and 'Alternate Character Name'. The 'Search' button at the bottom is also highlighted in red.

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

Notice the employee’s information is displayed.

4. Select the **Qualifications** tab.
5. Under **Licenses and Certification** select the **Add New Licenses and Certifications** hyperlink.

The screenshot shows the 'Person Profile' page for Kayiani O'Leary (Empl ID 00219546). The 'Qualifications' tab is selected. Under the 'Licenses and Certifications' section, the 'Add New Licenses and Certifications' link is highlighted. The page also shows sections for Honors and Awards, Language Skills, Memberships, and Competencies, each with an 'Add New' link. A 'Save' button is located at the bottom of the profile details.

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

The **Person Profile** pop-up page is displayed.

6. In the ***Issue Date** field, enter the **issue date of the license/certification**.
7. In the ***License** field, select the **magnifying glass to search for the qualified license/certification**.
8. In the **Country** field, enter **USA**.
9. In the **State** field, enter **FL**.
10. Select the **License Verified** check box once verified.

NOTE: It is important that this check box is selected once the license has been verified.

11. In the **Expiration Date** field, enter the **expiration date of the license/certification**.
12. In the **License/Certification Number** field enter the **License/Certificaiton number**.
13. In the **Issued By** field, enter the **qualified agency that issued the employee’s license/certification**.
14. Select **OK**.

Person Profile Help

Add New Licenses and Certifications

Empl ID 00219546 Kaylani Oleary
 Profile Type PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details 1 of 1 | View All

*Issue Date 01/01/2022

*License CPPO Cert Public Purchasing Officer

Country USA United States

State FL Florida

License Verified

Expiration Date 01/01/2025

License/Certification Number CPP12345 246 characters remaining

Issued By Universal Public Procurement Certification Council (UPPCC) 196 characters remaining

OK
Cancel
Apply and Add Another

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

Notice the License/Certification has been added within the Licenses and Certifications Section.

15. Under **Attachment**, select the **paper clip to add the license/certification documentation**.

Person Profile
 Empl ID: 00219546 Kaylani O'Leary
 Profile Type: PERSON Person
 *Profile Status: Active
 *Description: Kaylani O'Leary

Profile Actions: [Select Action]

Education **Qualifications** Veterans' Preference Additional Information MDC Blue Book

Licenses and Certifications

ID	License	Attachments
CPPO	Cert Public Purchasing Officer	

Buttons: Save, Return to Search, Add

16. Select **Add Attachment** to to enclose the license/certification documentation.

No attachments have been uploaded for this profile item.

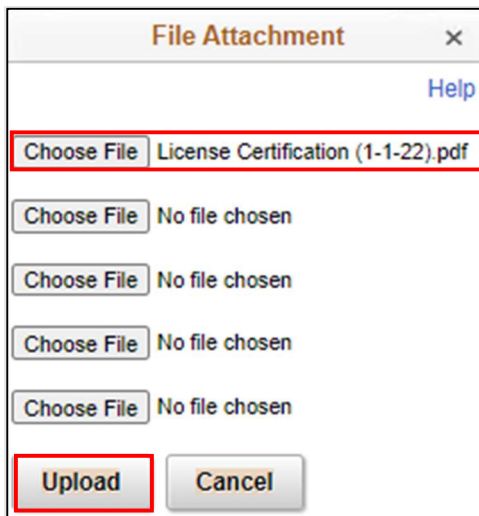
Add Attachment

OK Cancel

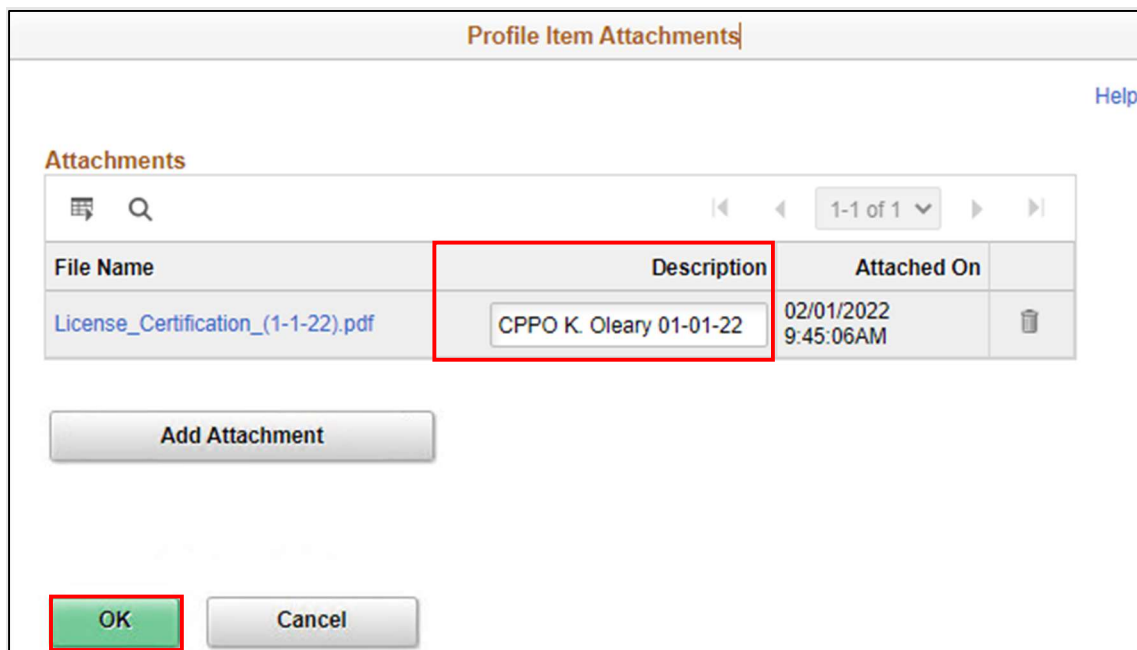
Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

17. Select **Choose File** and select the **file from the computer**.
18. Select **Upload**.



19. In the **Description** field, enter a **brief description**.
20. Select **OK**.



Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

21. Once all supporting documentations are enclosed, select **Save**.

The screenshot shows the 'Person Profile' page for Kaylani O'leary. The 'Licenses and Certifications' section is expanded, displaying a table with the following data:

ID	License	Attachments
CPPO	Cert Public Purchasing Officer	

At the bottom of the page, the 'Save' button is highlighted with a red box.

The DPR can now submit the Salary Change request to add the license/certification pay component for the respective employee via DPR Salary Changes.


Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for the Employee.
2. In the **Search your Employees**, field enter **Employee ID, Employee Name, or Classification.**
3. Select **Search.**

4. Select the **Employee's Record.**

Name / Title / ID - Record	Status / Type	Department
 Kaylani Oleary Procurement Contracting Ofc 1 00219546 - 0	Active Employee	PROCUREMENT - ID08010000

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

- In the ***Transaction Date** field, enter the **effective date of the transaction which is the first day of the beginning of pay period after employee’s certification issued date.**

NOTE: The effective date for Licenses/Certifications is the first of the beginning of the pay period after the employee’s certification issued date.

- In the ***Reason** field, select **Components of Pay** for License/Certifications.
- In the **Pay Components** section, select the **Plus sign (+)** to add the ***Rate Code for the License/Certification.**
- A new row will appear, select the **magnifying glass** to select the **License/Certification Rate Code.**

The screenshot displays the 'DPR Salary Change' application window. At the top, there are two progress indicators: 'MD Compensation Detail' (1) and 'MD Review & Submit' (2). The 'Compensation Details' section features a red-bordered box around the '*Transaction Date' field (set to 01/10/2022) and the '*Reason' dropdown menu (set to 'Components of Pay'). Below this is a table with columns: Pay Component, Change Percent, Change Amount, New Amount, Current Amount, Currency Code, Type, and Frequency. The table lists 'MDC Biweekly' and 'Premium Pay'. A salary range bar is shown with 'Minimum' and 'Maximum' values. The 'New Information' section shows 'Biweekly Salary' (2,744.10 USD) and 'Annual Rate' (71,345.80 USD). The 'Current Information' section shows 'Biweekly Salary' (2,744.10 USD) and 'Annual Rate' (71,345.80 USD). The 'Salary Plan' section includes 'Salary Admin Plan', 'Salary Grade', 'Grade Entry Date', 'Step', and 'Step Entry Date'. The 'Default Pay Components' section has tabs for 'Amounts', 'Controls', 'Changes', 'Conversion', and 'Show All'. A table below lists pay components with columns: *Rate Code, Seq, Comp Rate, Currency, Frequency, Percent, Rate Code Group. The table shows three rows, with the third row having a red-bordered box around the '+ -' control. At the bottom left, a red-bordered box highlights the 'Calculate Compensation' button.

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

A list of qualifying Comp Rate Codes will be displayed.

9. Select the **Comp Rate Code** related to the **License/Certification**.

Cancel		Lookup		
Search for: Rate Code				
▶ Search Criteria				
▼ Search Results				
<div style="display: flex; justify-content: space-between; align-items: center;"> ⌂ ☰ 8 rows </div>				
Comp Rate Code	Description	Comp Base Pay Switch	Rate Code Type	Rate Code Class
CARALW	Car Commuting Allowance	Y	Flat Amount	FLAT
HFSTP	Half Step	Y	Flat Amount	HLFSTP
LEAD	Leadworker	Y	Flat Amount	1STEP
MDBKLY	MDC Biweekly	Y	Flat Amount	FLAT
NGT1S	Night Differential	Y	Flat Amount	1STEP
NGT2	Night Differential	Y	Flat Amount	2STEP
PRCHCT	Purchasing Or Contract Procure	Y	Flat Amount	1STEP
PRMPAY	Premium Pay	Y	Flat Amount	FLAT

Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

Notice the License/Certification Rate code is now added.

10. Select **Default Pay Components**.
11. Select **Calculate Compensation**.

The system has now properly calculated the employee’s new Biweekly Salary.

12. Select **Next**.

The screenshot displays the 'DPR Salary Change' interface for Kay/ani O'leary. It includes sections for Compensation Details, Salary Plan, and Pay Components. A red box highlights the 'Next' button in the top right corner. Another red box highlights the 'Calculate Compensation' button at the bottom of the Pay Components table.

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,874.10	2,874.10	USD	Flat Amount	Biweekly
Purchasing Or Contract Procure		131.04	131.84		USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00		USD	Flat Amount	Biweekly

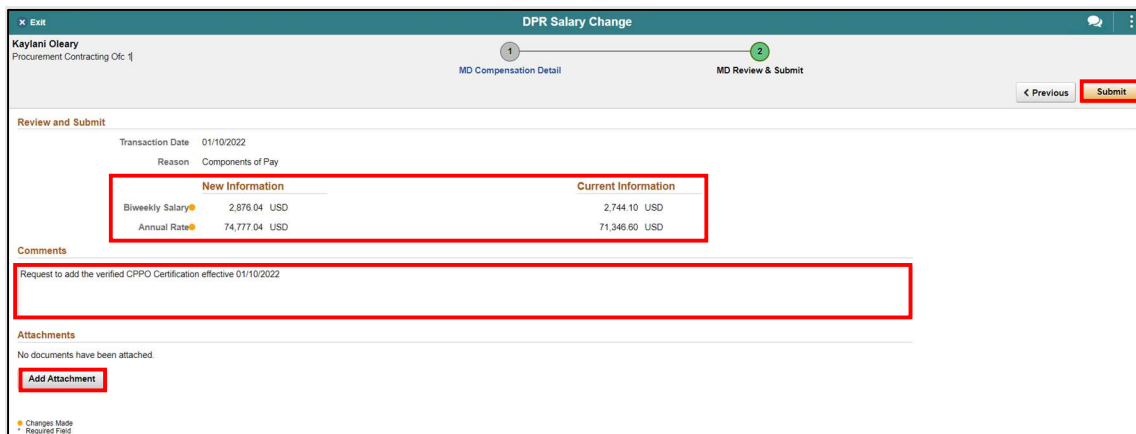
New Information		Current Information	
Biweekly Salary	2,878.04 USD	Biweekly Salary	2,744.10 USD
Annual Rate	74,777.04 USD	Annual Rate	71,348.80 USD

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
MDCBLY	0	2,874.10	USD	B		
PRCHCT	0	131.94	USD	B		
PRSPRY	0	70.00	USD	B		

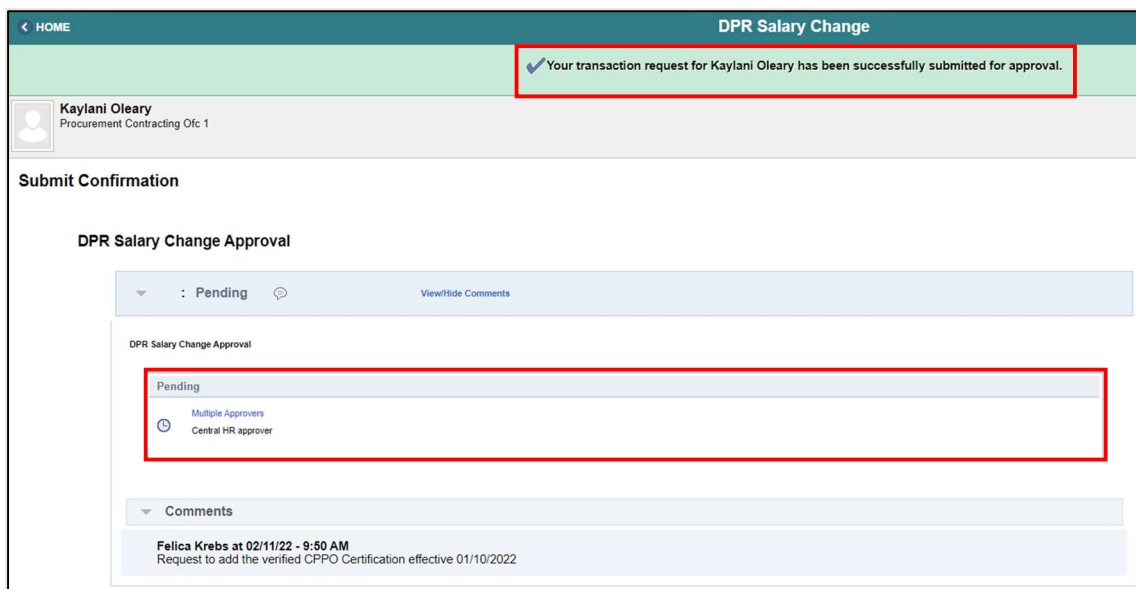
Lesson 6: Submitting HR Salary Changes

Lecture 4: Pay Components (Licenses/Certifications)

13. Review the **New Information** section versus the **Current Information** section. Notice the new **Biweekly Salary**.
14. In the **Comments** section, add a **brief description for the request**.
15. Select the **Add Attachment** to **add any supporting documentation**.
16. Review and ensure the request is complete then select **Submit**.



The License/Certification Salary request has been successfully submitted pending the approval of Central HR.



Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (Salary Grade)

On the Job Data page, users can review Salary Changes once the Payroll, Time, and Attendance (PTA) Division has reviewed and approved the request.

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' section active. On the left, a navigation menu has 'Job Data' highlighted with a red box. The main content area is titled 'Job Data' and contains a search form. At the top of the form, the 'Find an Existing Value' button is highlighted with a red box. Below it, the 'Search Criteria' section is expanded, showing several search fields. The 'Empl ID' field, which includes a 'begins with' dropdown, is highlighted with a red box. Other fields include 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. At the bottom of the form, the 'Search' button is highlighted with a red box, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'.

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Salary
Grade)

4. Select the **Compensation** tab.

Notice the most recent record. **1 of 2**, the **Effective Date**, **Effective Sequence**, **Action**, **Reason**, and the new **Compensation Rate**.

5. Within the **Pay Components** section, select the **Amounts** tab.

Notice the **Comp Rate** with the new Merit Increase.

HR Administration

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Empl ID 00218029
 Empl Record 0

Compensation Details 1 of 2

Effective Date 11/24/2021	Action Pay Rate Change	Go To Row
Effective Sequence 1	Reason Merit	
HR Status Active	Job Indicator Primary Job	
Payroll Status Active		Current

Compensation Rate 1,670.27 USD *Frequency B Biweekly

Pay Rates

Biweekly	1,670.269500	USD	Hourly	20.878369	USD
Annual	43,427.007000	USD	Monthly	3,618.917250	USD

Pay Components

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY	0	1,610.269500	USD	B				+	-
2 PRMPYK	0	60.000000	USD	B				+	-

[Calculate Compensation](#)

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

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

[Update/Display](#) | [Include History](#) | [Correct History](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Salary
Grade)

6. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Claudette Mclean
Employee
Empl ID 00218029
Empl Record 0

Compensation Details ?
1 of 2

Effective Date 11/24/2021

Effective Sequence 1

HR Status Active

Payroll Status Active

Action Pay Rate Change

Reason Merit

Job Indicator Primary Job

Go To Row

Current

Compensation Rate 1,670.27 USD *Frequency B Biweekly

► Comparative Information ?

▼ Pay Rates ?

Biweekly	1,670.269500	USD	Hourly	20.878369	USD
Annual	43,427.007000	USD	Monthly	3,618.917250	USD

Default Pay Components Contract Change Prorate Option

Pay Components ?
1-2 of 2

Amounts
Controls
Changes
Conversion

*Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent		
1 MDBKLY	0	76.679500	USD	Biweekly		5.000	+	-
2 PRMPYK	0	0.000000	USD	Biweekly		0.000	+	-

Calculate Compensation

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

Save

Return to Search

Notify

Refresh

Update/Display

Include History

Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (Salary Grade)

Listed below is the initial record of the employee. Notice the displayed record **2 of 2**, **Effective Date**, and the previous **Compensation Rate** and ***Rate Code** before the merit increase.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Claudette Mclean Employee Empl ID 00218029
Empl Record 0

Compensation Details ?
2 of 2

Effective Date 12/28/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Data Change

Reason

Job Indicator Primary Job

Go To Row History

Compensation Rate 1,593.59 USD *Frequency B Biweekly

Comparative Information ?

Pay Rates ?

Biweekly	1,593.590000	USD	Hourly	19.919875	USD
Annual	41,433.340000	USD	Monthly	3,452.778333	USD

Default Pay Components Contract Change Prorate Option

Pay Components ?

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
1 MDBKLY	0	1,533.590000	USD	B				+	-
2 FRMPYK	0	60.000000	USD	B				+	-

Calculate Compensation

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

Save
Return to Search
Notify
Refresh
Update/Display
Include History
Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary Changes via Job Data (Salary Step)

Review the Salary Change request for a Salary Step employee.

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' section active. On the left, a navigation menu has 'Job Data' highlighted with a red box. The main area is titled 'Job Data' and contains a search form. At the top of the form, the 'Find an Existing Value' button is highlighted in red. Below it, the 'Search Criteria' section is expanded, showing several search fields. The 'Empl ID' field, which has a dropdown set to 'begins with', is highlighted with a red box. Other fields include 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. At the bottom of the form, the 'Search' button is highlighted in red, along with a 'Clear' button and a 'Save Search Criteria' link. The interface also includes checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'.

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Salary
Step)

4. Select the **Salary Plan** tab.

Notice the most **Current** record **1 of 1**, the **Effective Date**, **Action**, **Reason**, **Step** and **Step Entry Date**. The non-job basis employee's salary change request for the merit increase from **Step 9 to Step 10** was processed with the effective date of **1/31/2022**.

The screenshot shows the 'HR Administration' interface with the 'Salary Plan' tab selected. The employee information includes 'Ofir Doty' and 'Employee' with 'Empl ID 00014872' and 'Empl Record 0'. The 'Salary Plan Details' section shows a single record with the following highlighted fields: 'Effective Date' (01/31/2022), 'Action' (Pay Rate Change), 'Reason' (Merit), 'Step' (10), and 'Step Entry Date' (01/31/2022). The record is marked as 'Current'. The 'Salary Admin Plan' is 'K' and the 'Grade' is '035'. The 'Salary Plan' is 'GSAF - OPEIU Local 100' and the 'Grade Entry Date' is '01/31/1994'. The interface includes navigation tabs for 'Job Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Salary
Step)

5. Select the **Compensation** tab.
 6. Within the **Pay Components** section, select the **Amounts** tab.
- Notice the **Comp Rate** with the new Merit Increase.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Offr.Duty Employee Empl ID 00014872
Empl Record 0

Compensation Details 1 of 1

Effective Date	01/31/2022		Go To Row
Effective Sequence	0	Action	Pay Rate Change
HR Status	Active	Reason	Merit
Payroll Status	Active		

Current

Compensation Rate	2,215.80 <input type="text"/>	USD		Frequency	B	Biweekly
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▶ **Comparative Information** ?

▶ **Pay Rates** ?

Default Pay Components
Contract Change Prorate Option

Pay Components 1-2 of 2

Amounts
Controls
Changes
Conversion
||▶

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	MDBKLY	0	2,145.800000 <input type="text"/>	USD	B		
2	PRMPAY	0	70.000000 <input type="text"/>	USD	B		

Calculate Compensation

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

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Salary
Step)

7. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Offr. Duty Employee
Empl ID 00014872
Empl Record 0

Compensation Details ?
1 of 1

Effective Date 01/31/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change

Reason Merit

Go To Row

Current

Compensation Rate 2,215.80 USD Frequency B Biweekly

► Comparative Information ?

► Pay Rates ?

Default Pay Components Contract Change Prorate Option

Pay Components ?
1-2 of 2

Amounts
Controls
Changes
Conversion

Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent
1 MDBKLY	0	88.060000	USD	Biweekly		4.279
2 PRMPAY	0	0.000000	USD	Biweekly		0.000

Calculate Compensation

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

Lesson 6: Submitting HR Salary Changes

Lecture 5: Review Salary Changes via Job Data (Pay Components)

Review the Salary Change for requested Pay Components.

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface with the 'HR Administration' section selected. On the left, a navigation menu has 'Job Data' highlighted. The main area is titled 'Job Data' and contains a search form. At the top of the form is a 'Find an Existing Value' button, which is highlighted with a red box. Below this is a 'Search Criteria' section with several input fields: 'Empl ID begins with', 'Empl Record =', 'Name begins with', 'Last Name begins with', 'Second Last Name begins with', 'Alternate Character Name begins with', and 'Middle Name begins with'. The 'Empl ID begins with' field is also highlighted with a red box. At the bottom of the form are 'Search' and 'Clear' buttons, with 'Search' highlighted in red. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a 'Save Search Criteria' link.

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data (Pay
Components)

4. Select the **Compensation** tab.

Notice the **Current** record **1 of 1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee’s salary change request for the Leadworker (LEAD) pay component was approved and processed with the effective date of **1/31/2022**.

HR Administration

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Georgie Looper Empl ID 00197376
Employee Empl Record 0

1 of 1

Effective Date 01/31/2022

Go To Row

Effective Sequence 0 Action Pay Rate Change

HR Status Active Reason Components of Pay

Payroll Status Active Current

Compensation Rate 4,600.61 USD Frequency B Biweekly

Comparative Information

Change Amount	193.154800 USD	Biweekly	
Change Percent	4.382	Compa-Ratio	1.46

Pay Rates

Default Pay Components Contract Change Prorate Option

Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 EDINCP	0	155.780000 USD	USD	B			
2 FIRBA	0	50.770000 USD	USD	B			
3 FIRPRM	0	856.420800 USD	USD	B		24.000	MDCMAX
4 HZDFIR	0	125.000000 USD	USD	B			
5 LEAD	0	155.770000 USD	USD	B			
6 MDBKLY	0	3,256.870000 USD	USD	B			

Calculate Compensation

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

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data
(License/Cert.)

Review the Salary Change for requested License/Certification Pay Components.

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM) HR Administration' interface. On the left, a sidebar lists navigation options: Job Information (expanded), Job Data (highlighted with a red box), Workforce Job Summary, Manage Employee Profile, Headcount, Labor Administration, HR Configuration, Dotted Line, Export Org Chart, OnBoarding, and OffBoarding. The main area is titled 'Job Data' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button (highlighted with a red box) and a 'Keyword Search' input field. A 'Search Criteria' section is expanded, showing several search fields: 'Empl ID begins with' (highlighted with a red box), 'Empl Record =', 'Name begins with', 'Last Name begins with', 'Second Last Name begins with', 'Alternate Character Name begins with', and 'Middle Name begins with'. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', along with a 'Search' button (highlighted with a red box) and a 'Clear' button. A 'Basic Search' link and a 'Save Search Criteria' button are also visible.

Lesson 6: Submitting HR Salary Changes

Lecture 5:
Review Salary
Changes via Job
Data
(License/Certific
ation)

4. Select the **Compensation** tab.

Notice the **Current** record. **1 of 1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee’s salary change request to add the **Procurement or Contract Procure (PRCHCT)** pay component was approved and processed with the effective date of **1/10/2022**.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Kaylani O'Leary Employee | Empl ID 00219546 | Empl Record 0

Compensation Details 1 of 1

Effective Date: 01/10/2022

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Pay Rate Change

Reason: Components of Pay

Current

Compensation Rate: 2,876.04 USD

Frequency: B Biweekly

Comparative Information

Change Amount: 131.940000 USD

Change Percent: 4.808

Compa-Ratio: 1.12

Pay Rates

Default Pay Components

Contract Change Prorate Option

Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	2,674.100000	USD	B			
2 PRCHCT	0	131.940000	USD	B			
3 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

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

End of Review Salary Changes via Job Data Process

Lesson 6: Training Activity 1

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

Scenario DPR will add a certification to employee's profile.

Instructions This activity is 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 6: Training Exercise

Debrief



1. What is required to be attached, if the merit increase requesting is more than 5% for the employee?

2. If the employee is not able to submit their license/certification request via Employee Self Service, the employee’s manager or the DPR must manually enter the submission via Employee Profile before submitting Salary Change Request. (True or False)

Lesson 6: Submitting HR Salary Changes

Lesson Summary



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

- Request Merit Increase for Salary Grade Employee
- Request Merit Increase for Salary Step Employee
- Request Component of Pay
- Request License/Certification.

Lesson 7: Payroll

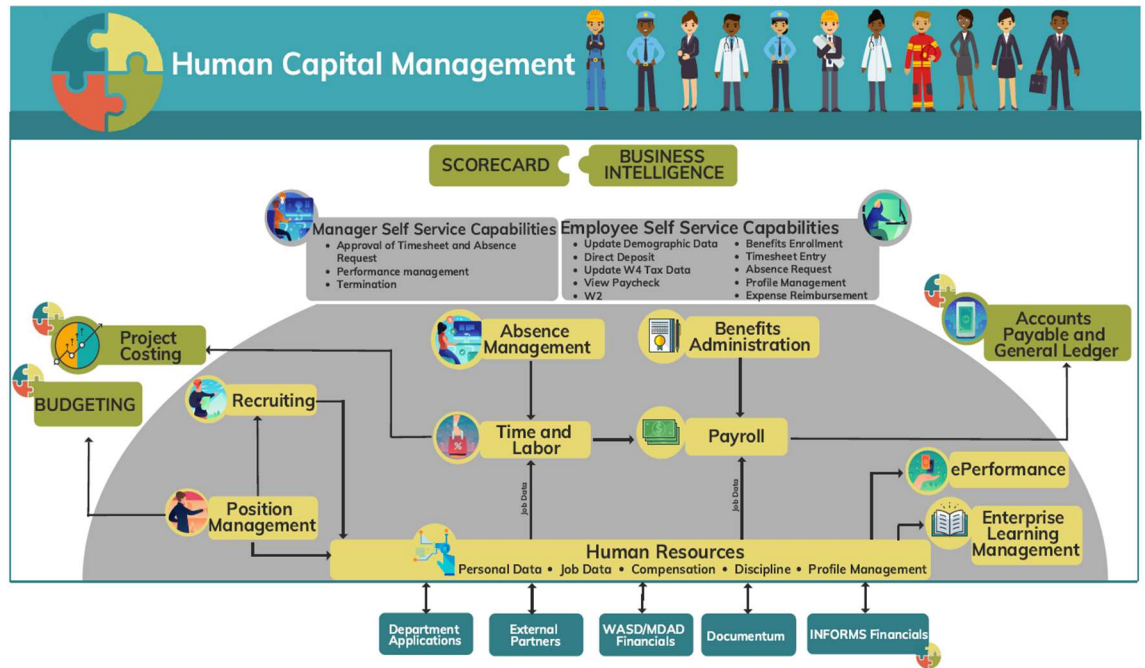
Lesson 7: Overview

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

- Reviewing Employee's Paycheck for a specific pay period

Lesson 7: Payroll

Lesson 8: Introduction



Lesson 7: Payroll

Key Terms



The following key terms are used in this module:

Term	Definition
Pay Calendar	Use pay calendars to schedule payroll cycles for your paygroups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements such as employee type, pay frequency, same country location, and so on. A pay group consolidates a set of employees within a company for payroll processing
Pay Run IDs	Pay Run Ids enable payroll processes to be run for each calendar. A pay run id must be created for each “run”. Pay Run Ids must be created and attached to a pay calendar at the beginning of a new year.
Earnings Codes	An earnings code defines a type of earnings that your organization requires such as regular earnings, vacation, holiday, special earnings.
Deduction Codes	In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. The system uses different deduction rules depending on the type of deduction that you are setting up.

Lesson 7: Payroll

Lecture 1: Payroll

This lesson will review Define Payroll.

- Review an Employee's Paycheck for a specific pay period.

Lesson 7: Payroll

Lecture 1: Payroll

Users can review an employee’s Paycheck via the Review Paycheck process. There are three pages in reviewing a paycheck such as **Paycheck Earnings, Paycheck Taxes, and Paycheck Deductions.**

NOTE: Users can review an employee’s paycheck via the review paycheck page. This page provides a detailed overview of an employee’s paycheck.

Navigate to: **Main Menu > Navigator > Payroll North America > Payroll Processing USA > Produce Payroll > Review Paycheck**

1. In the **Company** field, select **MDC**.
2. In the **Pay Group** field, select from the employee’s **specific Pay Group code**.

Listed below is the Pay Group Code chart with a brief explanation of the options.

Pay Group Code	Description	Details
MDC	General Employees	All county employees
NON	Miami-Dade Non-Employees	Foster Grandparent, Service Corps Worker, and Senior Companion
RET	Miami-Dade Retirees	Retirees

3. In the **Pay Period End Date** field, enter the **Pay Period End Date**.
4. In the **Empl ID** field, enter the **Employee’s 8-digit Numeric Identification Number**.
5. Select **Search**.

Review Paycheck

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Company begins with ▼ MDC

Pay Group begins with ▼ MDC

Pay Period End Date = ▼ 05/31/2020

Off Cycle ?

Page Nbr = ▼

Line Nbr = ▼

Separate Check Nbr = ▼

Paycheck Number = ▼

Empl ID begins with ▼

Name begins with ▼

Case Sensitive

[Basic Search](#)

Lesson 7: Payroll

Lecture 1: Payroll

6. Select the **individual paycheck** you want to review by clicking on any link in the desired line.

Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
MDC	MDC	10/31/2021	N	1	1	0	ADVICE	30969		
MDC	MDC	10/31/2021	N	2	1	0	ADVICE	30970		
MDC	MDC	10/31/2021	N	2	2	0	ADVICE	30971		
MDC	MDC	10/31/2021	N	2	3	0	ADVICE	30972		
MDC	MDC	10/31/2021	N	3	1	0	ADVICE	30976		

Pay Group - Displays the pay group the paycheck was paid under.

Pay Period End Date - Lists the end date of the pay period of the employee's paycheck.

Off-Cycle? - Indicates whether or not the paycheck was paid as part of regular on-cycle processing (shows as 'N' in this field) or was created as an off-cycle check (shows as 'Y' in this field)

Form Identification - Indicates whether the paycheck was paid as a paper check (CHECK) or went direct deposit (ADVICE). If a check is still in calculated status, or the employee had a confirmed payroll with no earnings on it, this field will show the following value: (blank)

Paycheck Number - Displays the paper paycheck number or advice number associated with each payment. If a check is still in calculated status, or the employee had a confirmed payroll with no earnings on it, this field will show the following value: 0

Empl ID - Displays the employee's employee ID

Name - Displays the employee's name

Lesson 7: Payroll

Lecture 1: Payroll

Once you have clicked the link of the employee paycheck you want to view, you will be taken to that paycheck's detail. There are multiple tabs within the Review Paycheck page that each display different information: Paycheck Earnings, Paycheck Taxes, Paycheck Deductions.

Important fields in this section include:

- **Paycheck Status** - This field shows the status of the payment. The following are the most common statuses you may see in this field:
 - **Calculated** - This status means that the paycheck has not yet been confirmed. You will see this status during the payroll processing week.
 - **Confirmed** - This status tells you the paycheck you are viewing has been confirmed.
 - **Reversed** - This status indicates the paycheck has been reversed, canceling that payment to the employee.
- **Paycheck Option** - This field tells you the method by which the employee was paid. The following are the most common values you will see in this field:
 - **Check** - The employee received a paper check for the payroll
 - **Advice** - The employee received their paycheck via direct deposit for the payroll
 - **Check Reversal** - When a paycheck reversal is completed, the status of the original check changes to "Reversed" and a negative off-setting entry is created in Review Paycheck with the Paycheck Option of "Check Reversal."
 - **Manual** - This paycheck option is only associated with off-cycle paychecks/adjustments. Records that have been created with the paycheck option of "Manual" only update an employee's balances and do not actually pay the employee.
- **Issue Date** - This is the pay date of the paycheck.
- **Paycheck Number** - This field displays the paper paycheck number or advice number associated with the payment
- **Off-Cycle** - This box will not be checked if the paycheck was processed as part of the regular, on-cycle payroll process. This box will be checked if the paycheck was processed as a non-standard off-cycle check.
- **Cashed** - This box will be checked when the bank notifies us that the employee cashed his/her paper check. This field only applies to hard copy paper checks.
- **Earnings** - This is the gross amount paid to the employee on the paycheck.
- **Taxes** - This is the sum of all taxes deducted from the employee's paycheck.
- **Deductions** - This is the sum of all non-tax-related deductions taken from an employee's paycheck.
- **Net Pay** - This is the net amount the employee actually received.

Lesson 7: Payroll

Lecture 1: Payroll

1. Select the **drop-down arrow of Page 1 of 2** and select **2 of 2**.

Page **2 of 2** displays pay week **Begin Date 5/25/2020** and **End Date 5/31/2020** with the details of **Paycheck Totals, Other Earnings, and Special Accumulators** for the second week of the pay period.

< Paycheck Earnings
Review Paycheck

Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

Empl ID 00216718 Name Kennedy, Matthew L

Company MDC Pay Group MDC Pay Period End 05/31/2020 Page 126 Line 7 Separate Check

Paycheck Information

Paycheck Status Confirmed Paycheck Option Advice

Issue Date 06/05/2020 Paycheck Number 3521

Off Cycle Reprint Adjustment Corrected Cashed

Paycheck Totals

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

Earnings 2 of 2 View All

Begin Date 05/25/2020 End Date 05/31/2020 Addl Line Nbr 3 Reason Not Specified

Empl Record 0 Benefit Record 0 Additional Data

Salaried

Hours	0.00
Rate	44.042769
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State FL Locality

Rate Used Hourly Rate Shift Not Applicable Shift Rate

Other Earnings 1-1 of 1 View All

Other Earnings Details 1 Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source
REG	Regular Hours Pay	Hourly Rate	48.00	44.042769	2,114.05	

Special Accumulators 1-1 of 1 View All

Code	Description	Hours	Earnings	Empl Record
GRS	Reserved for Gross Wages	96.00	4,228.10	0

Return to Search
Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Lesson 7: Payroll

Lecture 1: Payroll

The **Paycheck Taxes** tab displays a breakdown of the federal and state tax amounts that were withheld from the employee's paycheck. It displays the taxable gross on which the tax withholdings were calculated. The Tax Entity column defines whether the type of tax withheld is for the Federal Government or State. The Tax Class column lists the different types of taxes withheld:

Federal MED/EE - Employee paid Medicare tax (MICA)

Federal Med/ER – Employer-paid Medicare tax (not withheld from the employee's pay) (MICA)

Federal OASDI/EE - Employee paid Social Security tax (FICA)

Federal OASDI/ER - Employer paid Social Security tax (not withheld from the employee's pay) (FICA)

Federal Withholding - Federal withholding tax

State Withholding - State withholding tax (if applicable).

2. Select **Paycheck Taxes** tab.
3. Select **Tax Details 1** tab to see the taxes for the pay period.

NOTE: ER are not visible on the employee’s paycheck in legacy application, they are employer portions.

Paycheck Taxes

Empl ID 00216718 Name Kennedy, Matthew L.
 Company MDC Pay Group FRE Pay Period End 05/31/2020 Page 126 Line 7 Separate Check

Paycheck Information
 Paycheck Status Confirmed Paycheck Option Advice
 Issue Date 06/05/2020 Paycheck Number 3521
 Off Cycle Reprint Adjustment Corrected Cashed

Paycheck Totals
 Earnings 4,228.10
 Taxes -2,416.20
 Deductions 186.76
 Net Pay 6,457.54

Taxes

Tax Entity	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal				MED/EE	4,101.26	-594.74
US Federal				Med/ER	4,101.26	-594.74
US Federal				OASDI/EE	4,101.26	-2,542.97
US Federal				OASDI/ER	4,101.26	-2,542.97
US Federal				Withholding	4,101.26	721.51

Return to Search Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Lesson 7: Payroll

1. Select the **Paycheck Deductions** tab.
2. Select the **Deduction Details 1** tab to view the employee’s deductions for the pay period.
3. Select the **Garnishment** arrow to view the general deductions.

< Paycheck Earnings
Review Paycheck

Paycheck Earnings

Paycheck Taxes

Paycheck Deductions

Empl ID 00216718 Name Kennedy, Matthew I.
Company MDC Pay Group FRE Pay Period End 05/31/2020 Page 126 Line 7 Separate Check

Paycheck Information

Paycheck Status	Confirmed	Paycheck Option	Advice
Issue Date	06/05/2020	Paycheck Number	3521
<input type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected
<input type="checkbox"/> Cashed			

Paycheck Totals

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

▼ Deductions

1-8 of 9
View All

Deduction Details 1

Deduction Details 2

Deduction Details 3

Deduction Code	Description	Class	Amount	Calculated Base
DCFFLF	DCFF Basic Life Ins Trust	Nontaxable Benefit	8.90	109,930.75
STDIS	Short-Term Disability Insuranc	After-Tax	3.80	259.99
FRS	FRS Contribution	Before-Tax	126.84	4,228.10
FRS	FRS Contribution	Nontaxable Benefit	1,035.88	4,228.10
FF1403	Firefighters Union Local 1403	After-Tax	38.94	
FFCHAR	Firefighters Charities	After-Tax	4.00	
FRPAC	Firepac	After-Tax	5.00	
LIFESX	Minnesota Opt Life (5X)	After-Tax	7.75	

▶ Garnishments

▼ Net Pay Distribution

1-1 of 1
View All

Check/Advice Number	Account Type	Bank ID	Account Number	Amount
3521	Checking	87654321	XXXX5678	6,457.54

Return to Search
Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Lesson 7: Payroll

NOTE: Garnishments section displays court related deductions such as Child Support.

Garnishments
Q | < << 1 of 1 >> > | View All

Priority	1	ID	GRN191	Type Tax Levy
Vendor	GARNISH-001			AP Status
Law Source	\$U			Rule ID LEVY/S Tax Levy/Single
Disposable Earnings	2,364.32			Proration Rule ID
Less Exemption	482.69			
Less Other Garnishments				
Maximum Deduction	1,881.63			
Limited Amount	1,881.63			Limited Type Deduct Not Limited
Garnishment Amount	1,881.63			
Company Fee				
Payee Fee				
Total Deducted	1,881.63			<input type="checkbox"/> Adjusted Due To Included Fee

Lesson 7: Payroll

Lecture 1: Payroll

The Paycheck **Deductions Details 2** tab displays the detailed deductions/contributions such as benefits plan and plan type.

< Paycheck Earnings
Review Paycheck

Paycheck Earnings

Paycheck Taxes

Paycheck Deductions

Empl ID 00216718 Name Kennedy,Matthew L
 Company MDC Pay Group FRE Pay Period End 05/31/2020 Page 126 Line 7 Separate Check

Paycheck Information

Paycheck Status	Confirmed	Paycheck Option	Advice
Issue Date	06/05/2020	Paycheck Number	3521
<input type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected
<input type="checkbox"/> Cashed			

Paycheck Totals

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

▼ Deductions

1-8 of 9
View All

Deduction Details 1

Deduction Details 2

Deduction Details 3

Deduction Code	Plan	Benefit Record	Plan Type	Not Taken	Reason
DCFFLF	FLIFE	0	Life		
STDIS	STDHGH	0	Short-Term Disability		
FRS	HB	0	Florida Retirement System		
FRS	HB	0	Florida Retirement System		
FF1403		999	General Deduction		
FFCHAR		999	General Deduction		
FRPAC		999	General Deduction		
LIFESX		999	General Deduction		

► Garnishments

▼ Net Pay Distribution

1-1 of 1
View All

Check/Advice Number	Account Type	Bank ID	Account Number	Amount
3521	Checking	87654321	XXXX5678	6,457.54

Return to Search
Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Lesson 7: Payroll

Lecture 2 Print Paycheck

This lecture will review how to view and print an employee’s paycheck.

Navigation: Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck

1. Select the **Company, Pay Group, and Empl ID** and select **Search**.
2. Select the **Employee Record** from the **Search Results**.

Review Self Service Paycheck

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Company begins with

Pay Group begins with

Empl ID begins with

Name begins with

Case Sensitive

Search [Basic Search](#)

Search Results

View All 1-1 of 1

Company	Pay Group	Empl ID	Name
MDC	MDC	00400873	Crespi,Christina

3. Select **View Paycheck** under the **View Self Service Paycheck** section.

View Self Service Paycheck

Christina.Crespi

Select Paycheck

Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
12/03/2021	View Paycheck	Miami Dade County	11/15/2021	11/28/2021	\$1135.97	60372	<input checked="" type="checkbox"/>
11/19/2021	View Paycheck	Miami Dade County	11/01/2021	11/14/2021	\$1319.22	62254	<input checked="" type="checkbox"/>

Lesson 7: Payroll

Lecture 2 Print Paycheck

- The employee's paycheck will be available to view. The DPR can print or save the paycheck as a PDF document.

Miami Dade County 111 NW 1st Street, Ste 2650 Miami, FL 33128-1995				Pay Group: MDC-General Employees Pay Begin Date: 11/15/2021 Pay End Date: 11/28/2021		Business Unit: PH Advice #: 000000000060372 Advice Date: 12/03/2021											
Christina Crespi 112 NW Second Street Miami, FL 33128		Employee ID: 00400873 Department: PH08100000-NEWBERG WAREHOUSE Location: OPEN LAND/VACANT LOT/CANAL Job Title: Electrician Pay Rate: \$1,900.70 Biweekly		TAX DATA: <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Federal</td> <td style="width: 50%;">FL State</td> </tr> <tr> <td>Tax Status: Single</td> <td>N/A</td> </tr> <tr> <td>Allowances: N/A</td> <td>0</td> </tr> <tr> <td>Add. Percent: N/A</td> <td></td> </tr> <tr> <td>Add. Amount:</td> <td></td> </tr> </table>				Federal	FL State	Tax Status: Single	N/A	Allowances: N/A	0	Add. Percent: N/A		Add. Amount:	
Federal	FL State																
Tax Status: Single	N/A																
Allowances: N/A	0																
Add. Percent: N/A																	
Add. Amount:																	
HOURS AND EARNINGS						TAXES											
Description	Rate	Current Hours	Earnings	YTD Hours	Earnings	Description	Current	YTD									
AdminHrs	23.758750	40.00	950.35	84.00	1,995.74	Fed Withholding	155.66	370.60									
AdminHrs	23.758750	24.00	570.21		0.00	Fed MED/EE	27.56	60.45									
Holiday	23.758750	16.00	380.14	24.00	570.21	Fed OASDI/EE	117.84	258.46									
Car Allowa			0.00		100.00												
Night Diff			0.00	16.00	17.83												
Overtime H			0.00	7.00	249.47												
Regular Ho			0.00	52.00	1,235.46												
TOTAL:		80.00	1,900.70	183.00	4,168.71	TOTAL:	301.06	689.51									
BEFORE-TAX DEDUCTIONS			AFTER-TAX DEDUCTIONS			EMPLOYER PAID BENEFITS											
Description	Current	YTD	Description	Current	YTD	Description	Current	YTD									
FRS Contribution	57.02	122.06	GARNChild (Amount)	50.00	100.00	Medical Select Insurance Plan	519.23	1,038.46									
			GARNChild (Co. Fee)	2.00	4.00	Basic Life Insurance	4.00	8.00									
			GARN-Tax Levy	250.40	672.70	FRS Contribution	205.66	440.24									
			GARNWrit (Amount)	81.25	81.25												
			GARNWrit (Co. Fee)	2.00	2.00												
			Govt Supervisors Assoc Dues	21.00	42.00												
TOTAL:	57.02	122.06	TOTAL:	406.65	901.95	*TAXABLE											
TOTAL GROSS		FED TAXABLE GROSS		TOTAL TAXES		TOTAL DEDUCTIONS		NET PAY									
Current	1,900.70	1,843.68	301.06	463.67	1,135.97			1,135.97									
YTD	4,168.71	4,046.65	689.51	1,024.01	2,455.19			2,455.19									
NET PAY DISTRIBUTION																	
Advice #000000000060372	Account Type	Account Number	Deposit Amount														
	Checking	XXXXXXXX6789	500.00														
	Checking	XXXXXXXXXX6075	635.97														
TOTAL:			1,135.97														
MESSAGE:																	
		Please consider the environment before printing your paystub 		Mission Statement: "Delivering excellent public services that address our community's needs and enhance our quality of life, now and in the future."													

Lesson 7: Training Activity 1

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

Scenario DPR will view an employee's paycheck.

Instructions This activity is 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 7: Training Exercise

Debrief



1. (True/False) The Paycheck Earnings page shows a two week pay period.

2. True/False) The Paycheck Deductions page displays deductions such as benefits, FRS Contributions, Metro Pass, and Garnishments

Lesson 7: Payroll

Lesson Summary



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

- Reviewing Employee's Paycheck for a specific pay period.

Lesson 8: Workflow Approvals

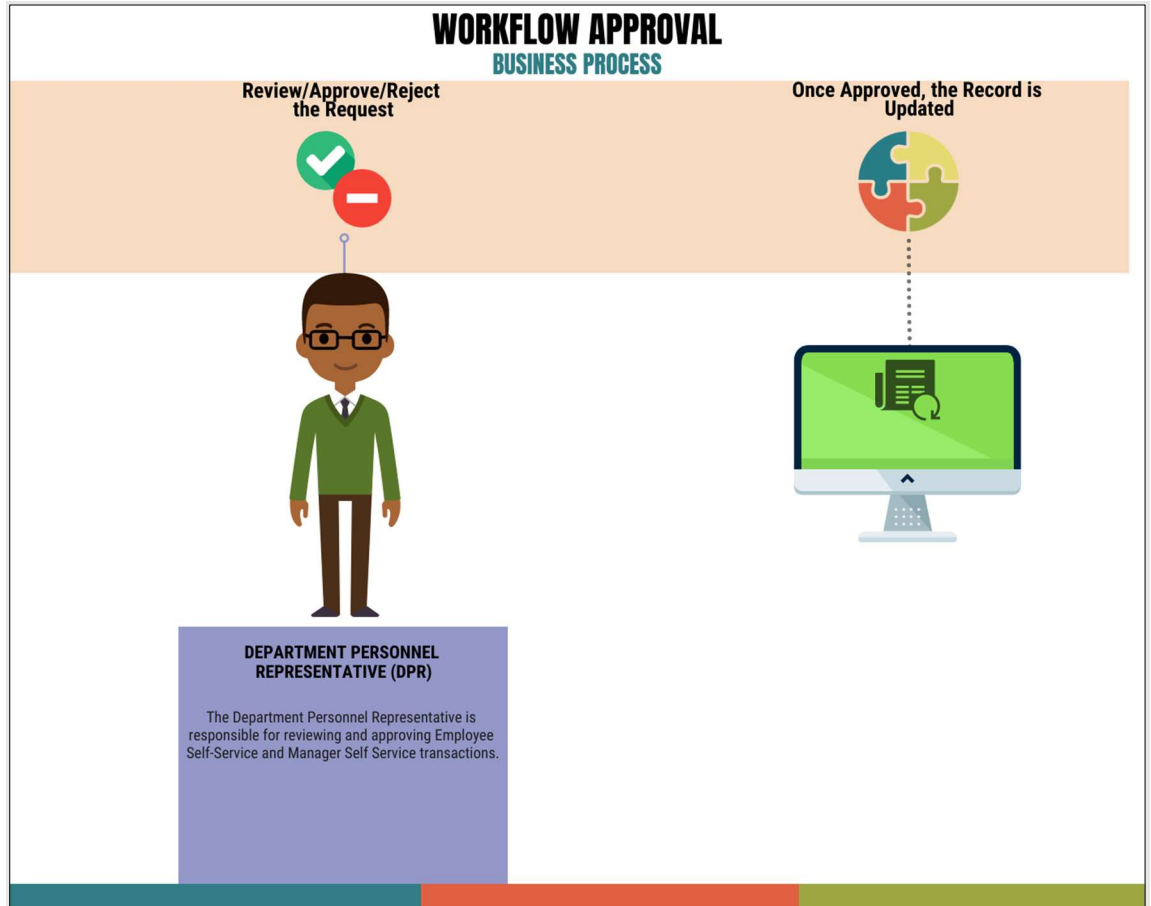
Lesson 8: Overview

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

- Review and Approve License/Certification Requests

Lesson 8: Workflow Approvals

Lesson 8: Introduction



Lesson 8: Workflow Approvals

Key Terms



The following key terms are used in this module:

Term	Definition
N/A	

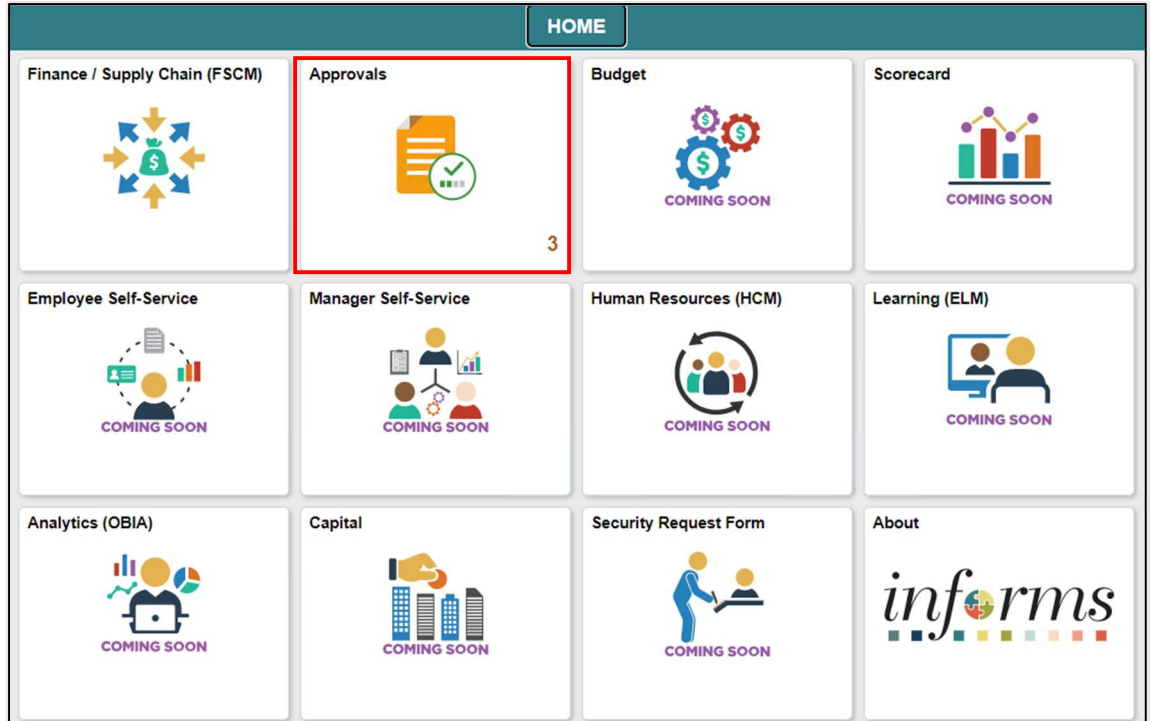
Lesson 8: Workflow Approvals

Lesson 8: Approvals (License/Certifications)

The Department Personnel Representative (DPR) is responsible for approving various transactions. One of the approvals related to guide is the Employee’s Profile License/Certification Request.

Navigate to Approvals: **Approvals**

The number on the bottom right side of the Approvals icon indicates how many items are pending approval.



There are (3) three Person Profile requests pending the DPR’s approval.

1. Select the **Licenses and Certifications** request.

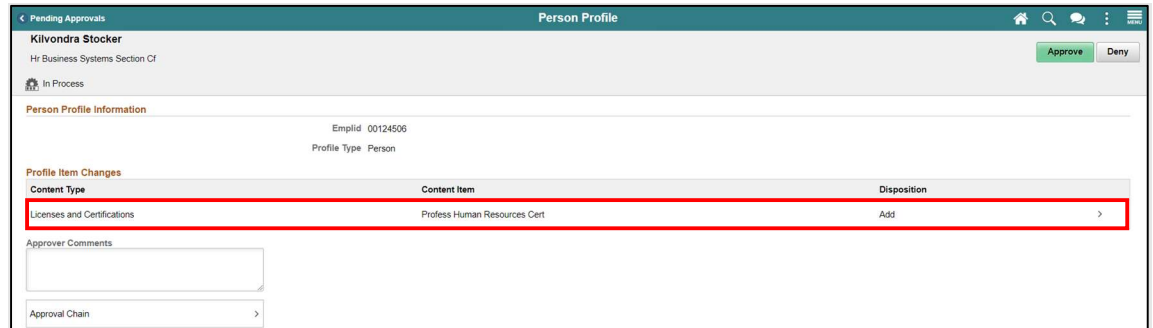
Pending Approvals			
View By	Type		
All	3	All	3 rows
Person Profile	3	Person Profile Devaughn Liang	Profile Type: Person Licenses and Certifications(1) Routed 01/20/2022
		Person Profile Kilvendra Stocker	Profile Type: Person Degrees(1) Routed 02/18/2022
		Person Profile Kilvendra Stocker	Profile Type: Person Licenses and Certifications(1) Routed 02/18/2022

Lesson 8: Workflow Approvals

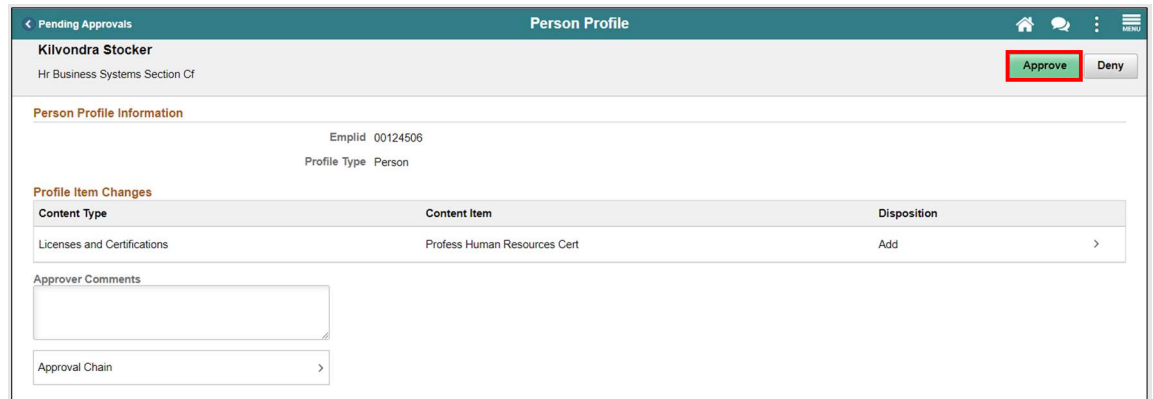
Lesson 8: Approvals (License/Certifications)

Upon the select, the Person Profile page will be displayed.

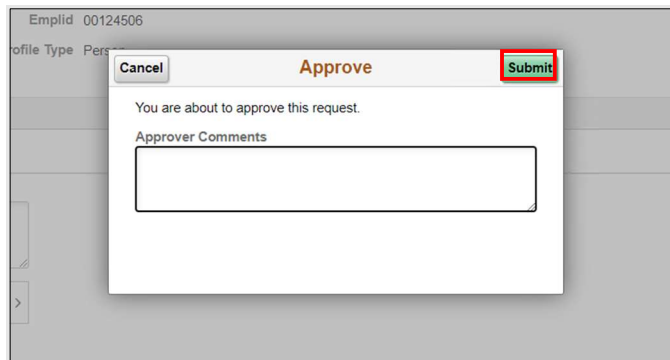
2. Select the **Profile Item Changes** content item to view the request before approving.



3. Select **Approve**.



4. Select **Submit**.



Lesson 8: Workflow Approvals

Lesson 8:

The pending and approved License and Certifications can be found on the Manage Employee Profile section.

Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile.**

The screenshot shows the 'Person Profile' page for Killvondra Stocker. The 'Approvals' section is highlighted with a red box and contains the following items:

- 1 item(s) pending approval (clock icon)
- 1 item(s) approved (since 09/27/2021) (green checkmark icon)

Below the Approvals section are tabs for Education, Qualifications, Veterans' Preference, Additional Information, and MDC Blue Book. At the bottom, there is a 'Degrees' table with the following data:

ID	Degree	Major Code	Attachments
BS	Bachelor of Science	Public Administration	
HSD	High School Diploma		

Note: Recently approved items will appear with a green check icon. Pending approvals will appear with a clock icon.

Lesson 8: Workflow Approvals

Lesson Summary

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

- Review and Approve License/Certification Requests



Lesson 8: Training Activity 1

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

Scenario DPR will review and approve a certification request.

Instructions This activity is 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 8: Training Exercise

Debrief



1. Can a License be updated to an employee's profile without being verified?

Lesson 9: Reports and Queries

Lesson 9: Overview

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

- Understand the list of Reports:
 - **RPT-HR-508:** Combo Code Summary
 - **RPT-HR-573:** Safe Driving Award
 - **RPT-HR-530:** Active and LOA Employee Counts by Business Unit
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Lesson 9: Reports and Queries

Key Terms



The following key terms are used in this Lesson.

Term	Definition
N/A	N/A

Lesson 9: Reports and Queries

Lecture 1: Reports and Queries

The following reports and queries are available for the Department Personnel Representative (DPR) to run in INFORMS.

Refer to **HCM 101: Human Resources Fundamentals** to gain step by step instructions to run the following:

Report Name	Description
Safe Driving Award	Used to obtain Departmental Employees with Safe Driving Award with Amount and Pay Period Date
Combo Code Summary	Used to obtain Departmental Combination Codes for Position Budget Funding related to Position Management
Active and LOA Employee Counts by Business Unit	Used to obtain active and leave of absence employee counts
Overtime and Earning Code, Detail Report	Used to obtain overtime and earning code details

Lesson 9: 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-508:** Combo Code Summary
 - **RPT-HR-573:** Safe Driving Award
 - **RPT-HR-530:** Active and LOA Employee Counts by Business Unit
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Module 3: Course Summary

Objectives Achieved



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

- Submit Job Change
- Position Management
- Define Department/Position Budget Data
- Submitting position change
- Submit Job Data Changes that impact benefits
- Submitting HR Transactions
- Submitting HR Salary Changes
- Workflow Approvals
- Reports and Queries

Next Steps

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

- Course assessment (tests your knowledge of the content)
- Course evaluation (collects course feedback)
- 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

- Add Position Budget Funding
- Budget Position Approval
- Compensation Position Approval
- Create New Position
- Inactivate Position
- Inactivate Position Budget Funding
- Lateral Employee Transfer
- Lic/Certification Pay Components
- Modify Position – Reports to Change
- Pay Components (LW)
- Submitting Merit Increases for Salary Grade Employees
- Submitting Merit Increases for Salary Step Employees
- Update Position Budget Funding
- Verify New Position Approval
- Verify Reports to Change via Job Data
- Workflow Approvals
- Update Employee Status
- View Employee Paycheck

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
Combination Code	A key that defines a combination of ChartFields needed for Position Budget Funding
Components of Pay	Additional elements of pay added to the employees pay. They can be added or taken away based on operational need. The legacy term is pay exception.
Earnings Codes	An earnings code defines a type of earnings that your organization requires such as regular earnings, vacation, holiday, special earnings.
Full-Time Equivalent (FTE)	A unit that indicates the workload of an employed person. FTE's are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.
Job Code	Contains the classification's information such as title, salary plan and grade, bargaining unit, and job description. Previously known as Occupational Code.
Pay Calendar	Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements such as employee type, pay frequency, same country location, and so on. A pay group consolidates a set of employees within a company for payroll processing
Pay Run IDs	Pay Run Ids enable payroll processes to be run for each calendar. A pay run id must be created for each "run". Pay Run Ids must be created and attached to a pay calendar at the beginning of a new year.
Position Data	Information related to the position such as Position Information, Job Information, Work Location, Salary Plan Information
Sandwich Row	Position effective date lands in between Job effective dates, position row will not be added. The Job record will be manually updated by the HR Position Administrator.
Top of Stack	Position effective date is equal to or greater than Job effective date, system automatically updates Job record once approved.