Miami-Dade County

*inf**o**rms*

End-User Training Guide

Course Code: ESS 203
Course: Employee Self Service -Time Management

Course Overview

Course Description	This course provides a comprehensive review of the Time Management processes. This course consists of the following modules: • Module 1: Course Introduction • Module 2: Time Management • Module 3: Course Summary
Training Audiences	The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access: Employee
Prerequisites	Participants are required to complete the following End-User Training courses prior to starting this course: • ERP 101 – Overview of ERP • ERP 102 – INFORMS Navigation, Reporting, and Online Help
Other Related Courses	Participants can attend the other related courses to Departmental HR: • ESS 201 – Employee Self Service - eProfile, ePay, and ePerformance • ESS 202 – Employee Self Service - eBenefits
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 8 Hours

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Module 1: Course Introduction

Topics

This module covers the following topics:

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

Module 1: Course Introduction

Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted system 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:

Get an overview level understanding of the Employee Self-Service Time Management business processes which include:

- Submit Time
- Submit Absence
- View Time Exceptions
- Leave Donations

Module 1: Course Introduction

Training Audience:

Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:
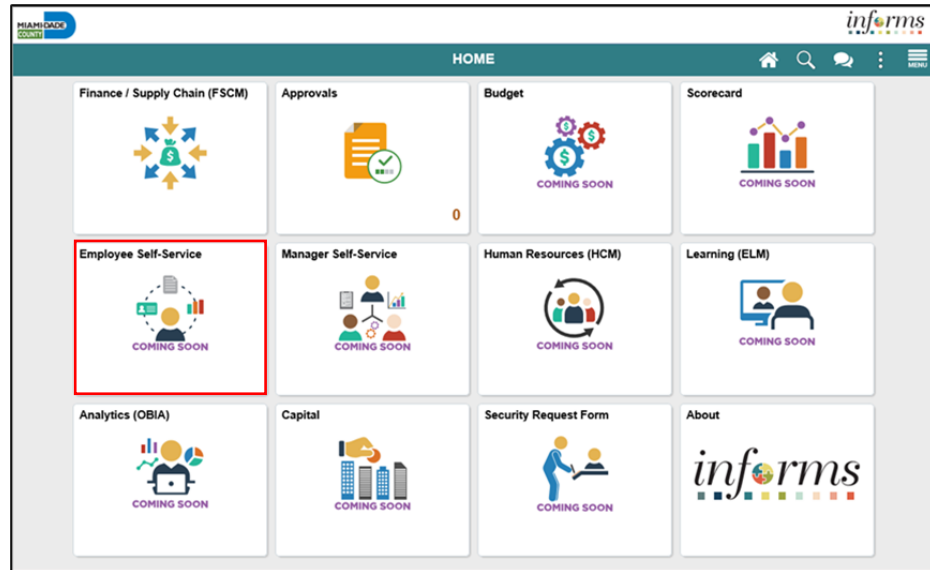
- **Employees:** The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications.

Module 1: Course Introduction

Navigation

1. Login to the INFORMS and select **Employee Self Service** from the home landing page.

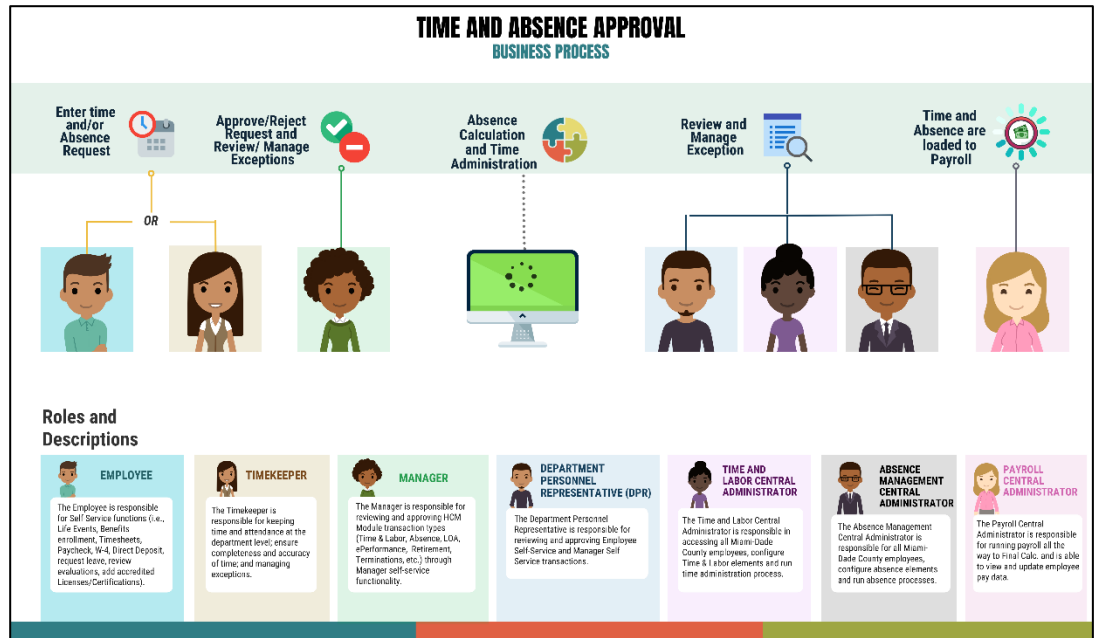# Module 1: Course Introduction

Purpose and Benefits of the Business Process

The purpose and benefits of the Time Management process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Enhanced Reporting
- Consolidated Benefit Billing System – Leave of Absence (LOA), retirees, and benefit billing all in one system

Module 1: Course Introduction

The End-to-End
Business
Process

TIME AND ABSENCE APPROVAL
BUSINESS PROCESS

| Enter time and/or Absence Request | Approve/Reject Request and Review/ Manage Exceptions | Absence Calculation and Time Administration | Review and Manage Exception | Time and Absence are loaded to Payroll |

Roles and Descriptions

EMPLOYEE	TIMEKEEPER	MANAGER	DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)	TIME AND LABOR CENTRAL ADMINISTRATOR	ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR	PAYROLL CENTRAL ADMINISTRATOR
The Employee is responsible for Self Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).	The Timekeeper is responsible for keeping time and attendance at the department level; ensure completeness and accuracy of time; and managing exceptions.	The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.	The Time and Labor Central Administrator is responsible in accessing all Miami-Dade County employees, configure Time & Labor elements and run time administration process.	The Absence Management Central Administrator is responsible for all Miami-Dade County employees, configure absence elements and run absence processes.	The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.

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
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 2: Time Management

Lessons   This module includes the following lessons:

- Submit Time
- Submit Absence
- Cancel Absence
- Unapproved Time and Absence
- View Time Exceptions
- Leave Donations

Lesson 1: Submit Time

Lesson 1:
Overview

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

- Report and submit Elapsed Time

- Adjust time through Elapsed Timesheet

- Submit holiday on Timesheet

Lesson 1: Submit Time

Lesson 1:
Introduction

TIME AND ABSENCE APPROVAL
BUSINESS PROCESS

Enter time and/or Absence Request — OR — Approve/Reject Request and Review/ Manage Exceptions — Absence Calculation and Time Administration — Review and Manage Exception — Time and Absence are loaded to Payroll

Roles and Descriptions

EMPLOYEE	TIMEKEEPER	MANAGER	DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)	TIME AND LABOR CENTRAL ADMINISTRATOR	ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR	PAYROLL CENTRAL ADMINISTRATOR
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Lesson 1: Submit Time

Key Terms

The following key terms are used in this Lesson.

Term	Definition
Reported Time	Time as it is entered on the timesheet. This is what supervisors will approve.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements and overtime.
Time Administration	INFORMS system process to trigger all the rules and generate exceptions.
Time Reporting Template	Determines fields used for time entry. There is an elapsed Time Report Template and a punch Time Reporting Template.
Time Reporter Type	Determines the information an employee must provide for work hours on the timesheet, Punch or Elapsed.

Lesson 1: Submit Time

Lecture 1:
Submit Time

This lesson will review Submit Time.

Payable time is the end product of the Time and Labor module. Payable time represents:

- The quantity of work performed, in hours or dollars
- The time reporting code that controls how the employee is paid
- The tasks to which time was reported by the employee

Online Time Entry Users

All employees who report time in the Miami-Dade County INFORMS Time and Labor module use the same pages to report work hours and tasks. These time reporting pages are the same pages that the employee's supervisor and the Department Personnel Representative (DPR)s view to approve time, too.

Key Impacts

The implementation of INFORMS Time and Labor enables the following new capabilities to departments and their employees:

- In INFORMS, there is now a single page that is used for both payment and task distribution purposes. The time and task reporting are done on the same line in the timesheet, and additional lines can be added for additional task reporting details or for more than two iterations.

- **Time reporting and approvals are completed on a weekly basis.**

NOTE: Non-Bargaining Salaried Employee's refer to Non-Bargaining Salaried Employee's Timesheet Job Aid.

Lesson 1: Submit Time

**Lecture 1: Submit Time through Elapsed Timesheet**

Submit Time through Elapsed Timesheet

This lecture outlines the following steps on how to submit time.

1. Navigation: **Homepage > Employee Self-Service > Time and Absence**.
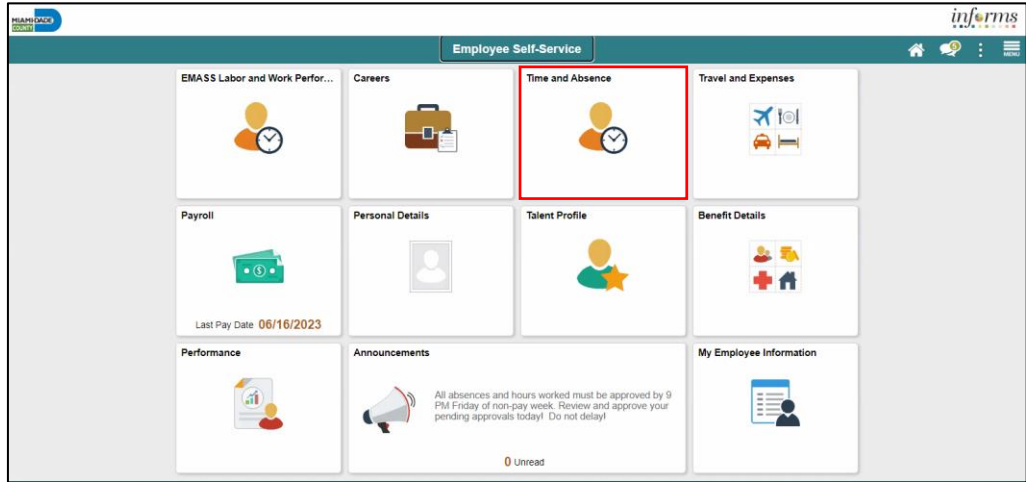
2. Select **Enter Time.**
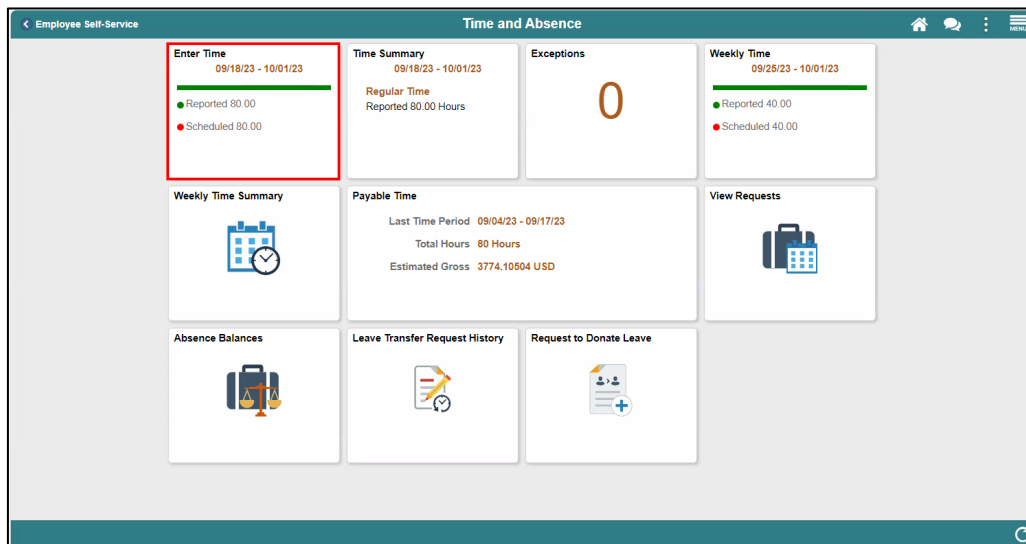
Lesson 1: Submit Time

Lecture 1: Submit Time through Elapsed Timesheet

Submit Time through Elapsed Timesheet

- Select the applicable **Time Reporting Code** (If no selection is made, when the timesheet is submitted, INFORMS will prompt an error message).
- Select the first applicable day of the time period you wish to report time for. **Note:** Timesheet will be defaulted to the current time period and display in a two-week view. The timesheet can be viewed by period or weekly. Select the desired view under the **View By** dropdown menu.

To delegate a specific number of hours to a different time reporting code for a given day, you will need to:

- Add another row for the day by Selecting the **Add a Row (+)** button.
- Select the appropriate **Time Reporting Code** from the dropdown list.
- Use the **Slider** beneath the timesheet to view additional dates. The timesheet displays two weeks at a time.
- Enter a portion of time on the applicable day where you are entering a different time reporting code.
    Note: When you enter a quantity, you must enter the time as a decimal. For example, 3 hours and 30 minutes would be entered as 3.5, not as 3.30.

Lesson 1: Submit Time

Lecture 1: Submit Time through Elapsed Timesheet

Submit Time through Elapsed Timesheet

- For **Out of Class** time reporting code, scroll to the rightmost section of the timesheet, and then select a corresponding **OCL Jobcode**.

3. Your default **Taskgroup** will auto-populate. If applicable, enter the appropriate **Task Profile ID** as directed by your department. Each different code will require its own row. Select the Lookup icon to select a different task profile ID.

4. When you have finished recording your time for the day, select **Submit**.

5. Select **OK** once a confirmation prompt is displayed.

| Lesson 1: Submit Time |

Lecture 2: Adjust Time

Adjust Time

This lecture outlines the following steps on how to adjust time.

1. Navigation: **Homepage > Employee Self-Service > Time and Absence > Enter Time**.
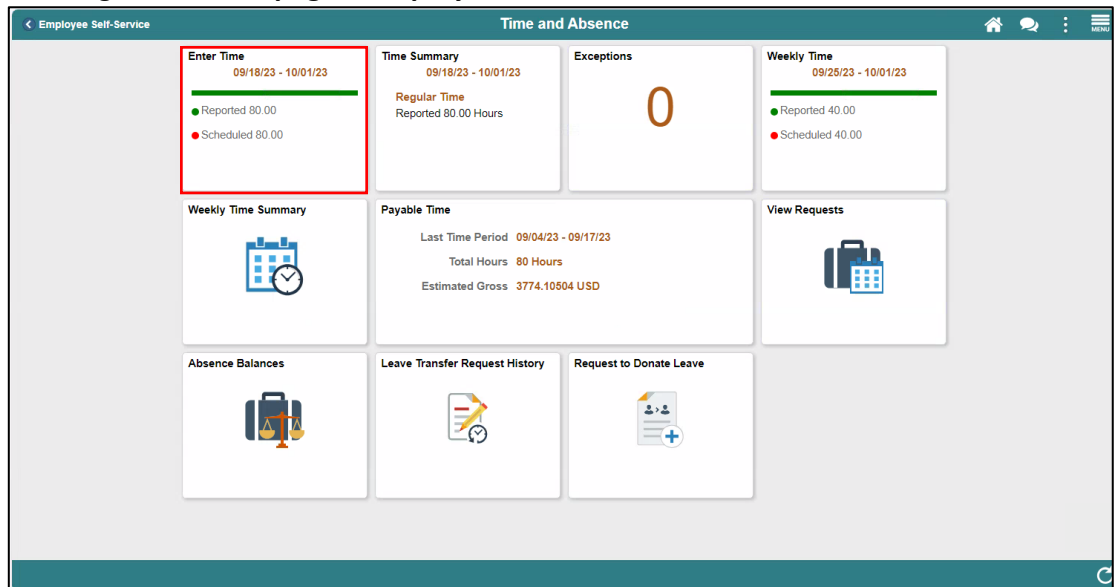
2. INFORMS will default to the current two weeks upon opening the timesheet. Use the Previous Week's and Next Week's arrows to locate the time frame you want to review. The calendar icon can be selected to search for a specific date within a pay period.

    Note: INFORMS will only allow you to go back two years from the current two weeks to adjust. If your adjustment exceeds two years prior to the current two weeks, contact your manager.

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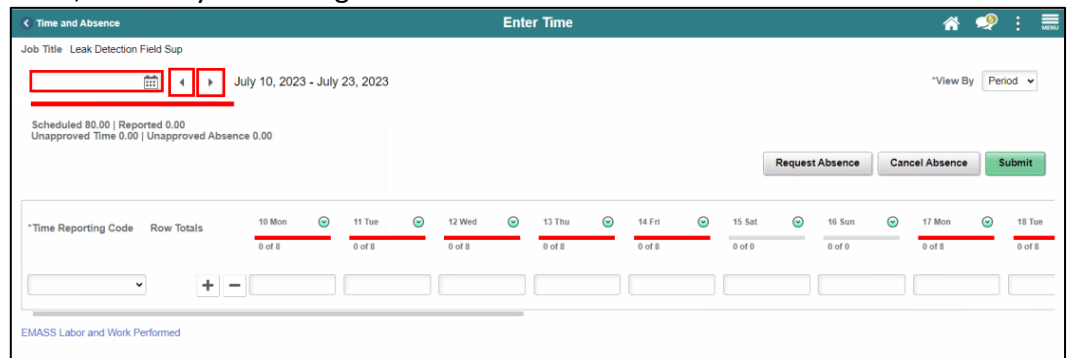
Lesson 1: Submit Time

Lecture 2:

Adjust Time

Adjust Time

3. Select the day you wish to adjust on. For this exercise, change the total amount of hours and then Select **Submit** to save your changes.

Timesheet Legend

Refer to the below legend for the meaning of the Timesheet icons.

Lesson 1: Submit Time

Lecture 3: Holiday Time

Holiday Time

This lecture outlines the following steps on how to submit time for a holiday.

Holidays will be prepopulated on the timesheet, stating HOLIDAY in red. If the Holiday falls on a scheduled workday and the employee is observing (not working) the Holiday. Do NOT enter any time or TRC for the Holiday. HOLDY – Holiday Observed TRC will automatically generate in Payable time after Time Administration process is run for the number of hours in the employee's schedule for that day.

Lesson 1: Submit Time

Lecture 3:
Unapproved
Time

Unapproved time is displayed in the left corner of timesheet.

Lesson 1: Training Activity 1

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

Scenario	Employee worked Overtime and Night Shift for a period • Employee Submits the hours worked

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. You can submit a timesheet without the time reporting code.
   a) True
   b) False

2. How far in advance can you submit your timesheets?
   a) 2 pay periods
   b) 5 pay periods
   c) 25 pay periods
   d) 1 fiscal year

3. How far back can you edit your timesheets?
   a) 2 pay periods
   b) 5 pay periods
   c) 2 years
   d) 1 fiscal year

Lesson 1: Lesson Summary

Objectives
Achieved

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

- Report and submit Elapsed Time
- Adjust time through Elapsed Timesheet
- Submit holiday on Timesheet

Lesson 2: Submit Absence

Lesson 2: Overview

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

- Use self-service pages to enter online requests for absences and view current and forecast future absence balances
- Track and validate employee takes and balances

Lesson 2: Submit Absence

Lesson 2: Introduction

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

- Use self-service pages to enter online requests for absences and view current and forecast future absence balances

- Track and validate employee takes and balances

Lesson 2: Submit Absence

Lesson 2: Introduction

Overview of the Absence Management Module

The implementation of the Absence Management module will improve current Absence Management processes. For example, the implementation automates several key calculations that are required for absence management. It also has improved processes, like Forecasting Eligibility Balances. The Absence Management module works in tandem with the Time and Labor module to create seamless processes.

The Absence Management module enables the employee to:

- Submit leave hours (current, future, and past)
- Track accruals, and available leave balances
- Validate available leave when entering takes (known as forecasting)
- Use takes to identify different types of pay
- Report FMLA

Lesson 2: Submit Absence

Lesson 2: Introduction

Overview of the Absence Management Module (cont.)

Capabilities

There are numerous capabilities being deployed in the Absence Management module. These capabilities include:

- Absence Eligibility: Employees and managers can use self-service pages to enter online requests for absences and view current and forecast future absence balances.
- Tracking and validating takes and balances.
- Sick Leave Conversion Payouts: Employee can see if they are eligible for sick leave payout and request it in Absence Management.

End-to-end Process:

- Several security roles are involved in completing tasks in Absence Management. These roles include: the Employee, Central Payroll Administration – Absence, and Absence Specialists. Together, these roles complete most Absence Management end-to-end processes.

Lesson 2: Submit Absence

Key Terms

The following key terms are used in this module:

Term	Definition
Absence Event	The period for which an employee is absent for the same reason.
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial.
Absence Balance	Leave balance available for the employee to use.
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Request	Method of entering leave, includes an Absence Type and Date(s).
Absence Take	Type of leave requested, linked to one or multiple TRC(s) (Time Reporting Code) in T&L (if cascading).
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.

Lesson 2: Submit Absence

Lecture 1:
Submit Absence

Submit Absence

An employee will use the Time and Absence page to submit absence.

- Navigation: **Main Menu > Employee Self-Service > Time and Absence > Enter Time**
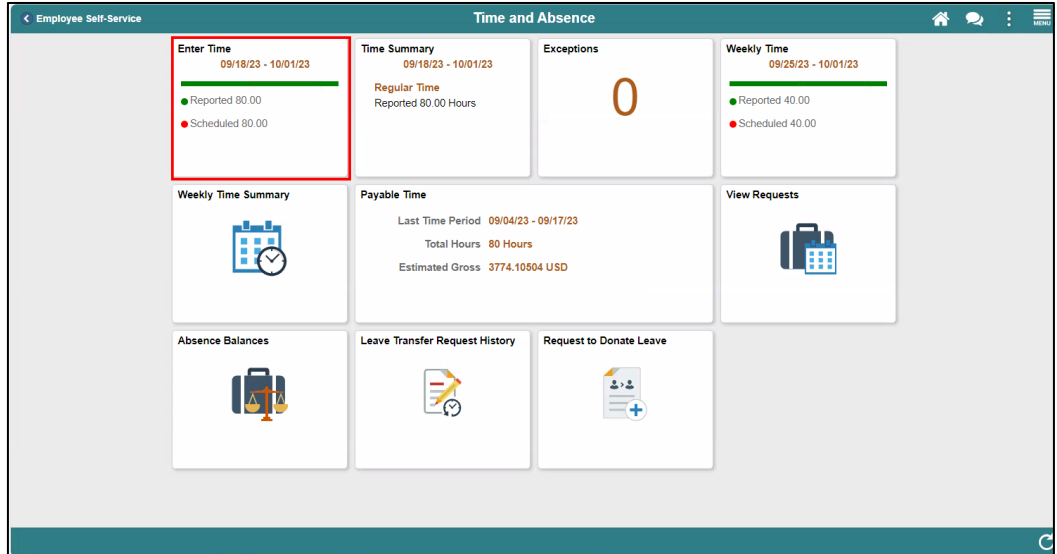
- Select the **Request Absence** button.
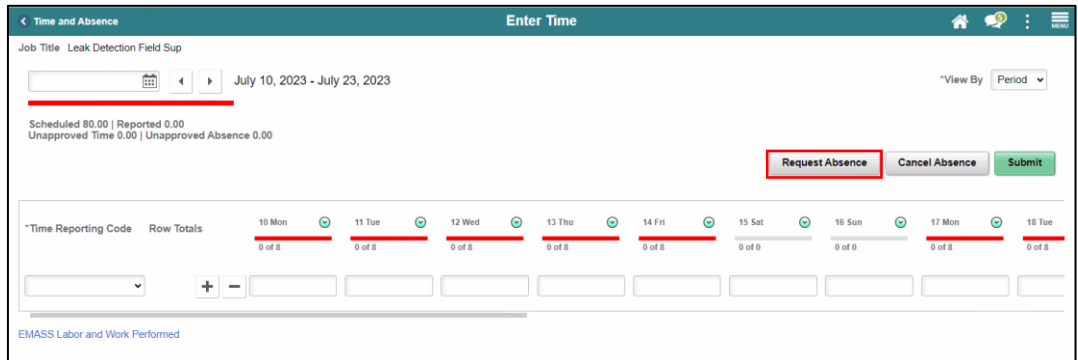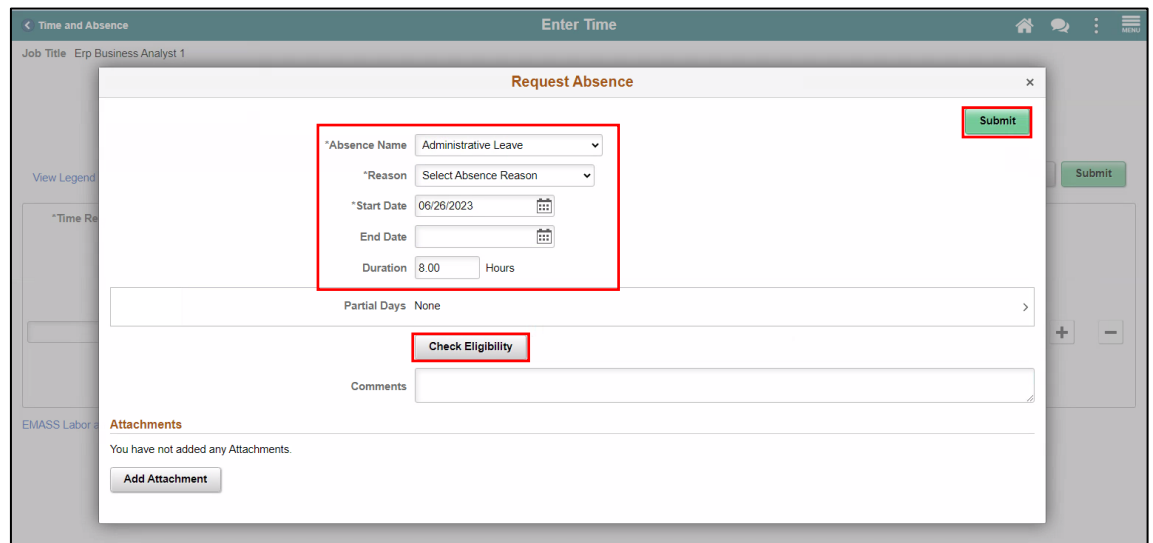
Lesson 2: Submit Absence

Lecture 1:
Submit Absence

3. Populate the following fields:
   - **Absence Name:** Absence type
   - **Reason:** Reason for absence
   - **Start Date:** Starting date of absence
   - **End Date:** Ending date of absence

   Note: Duration is automatically displayed once **Start** and **End** dates have been encoded.

4. Select the **Check Eligibility** box to check employee's available balance and eligibility of the selected absence.

5. Once complete, select the **Submit** button.

Lesson 2: Submit Absence

**Lecture 1:
Submit Absence**

6. **Optional:** The employee can select **Partial Days** field to enter partial number of hours of absence taken.

7. Select **All Days**, **End Day only**, **None**, **Start Day only**, or **Start and End Days** from drop down menu.

8. Enter **duration** and select the **Done** button.

Lesson 2: Submit Absence

Lecture 1:
Submit Absence

9. **Optional**: Attachments can be added to absence requests. This can be done by selecting **Add Attachment**.

10. Select **My Device** to attach supporting documents (i.e., Medical Certificate).

11. Select **Upload** and **Done**, then select **Add Attachment**.

Lesson 2: Submit Absence

12. Select **Submit**.

13. On the **Submit Confirmation** pop up, select the **Yes** button to submit the absence.

14. The process of submitting an absence request is now complete.

Lesson 2: Submit Absence

Employees can cancel absences from their timesheets. Follow navigation below:

- Timesheet Navigation: **Main Menu > Employee Self-Service > Enter Time > Cancel Absences**

Lesson 2: Submit Absence
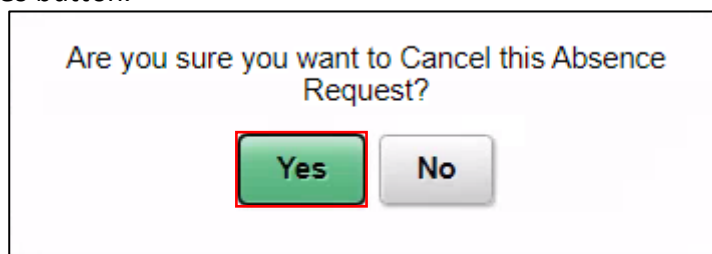
Lecture 2:
Cancel Absence

1. Select **Absence Request** that needs to be canceled.
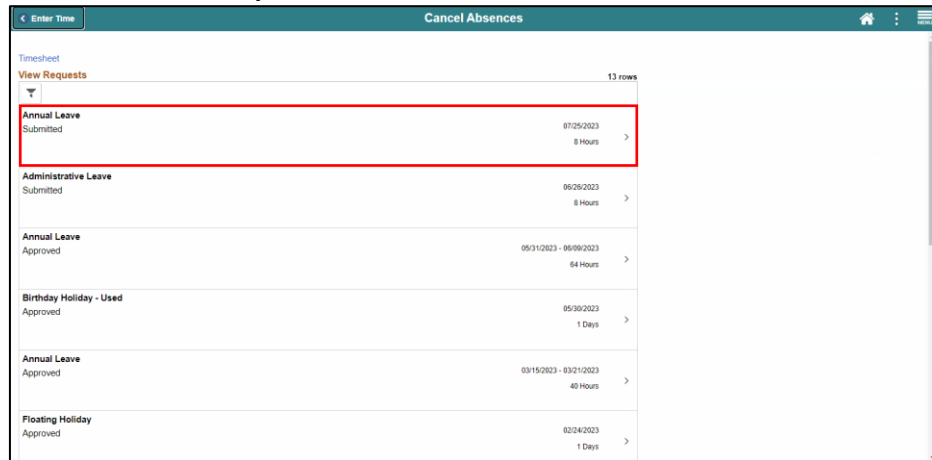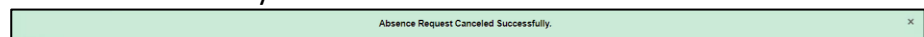

2. Select **Cancel Absence** button.
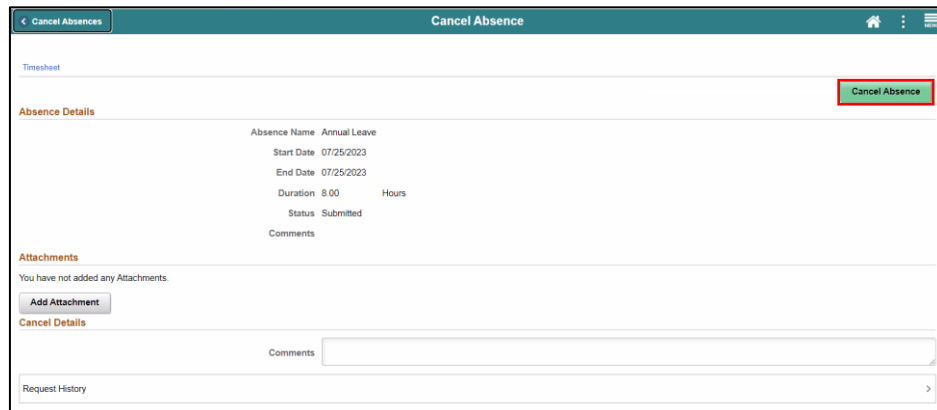
3. Select the **Yes** button.

4. Absence has successfully been canceled.

Lesson 2: Submit Absence

Lecture 3: Unapproved Absence

Unapproved Absences are displayed on the upper left side of the timesheet.

Employees can view the status of all absences via the **View Requests** tile. To navigate to the **View Requests** tile, follow navigation: **Main Menu > Employee Self-Service > Time and Absence > View Requests**

Absence with the status **Submitted** are not yet approved.

Lesson 2: Training Activity 1

Demonstration

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

Scenario

Employee requests an Annual Leave of 36 hours and start date with 4 hours partial

- Employee Submits the Absence 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 2: Training Exercise

Debrief

1. What type of Leave can you request in Absence Management?
   a) Annual
   b) FMLA
   c) Military
   d) All the above

2. You can submit absence without checking eligibility.
   a) True
   b) False

Lesson 2: Lesson Summary

Objectives Achieved

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

- Use self-service pages to enter online requests for absences and view current and forecast future absence balances

- Track and validate employee takes and balances
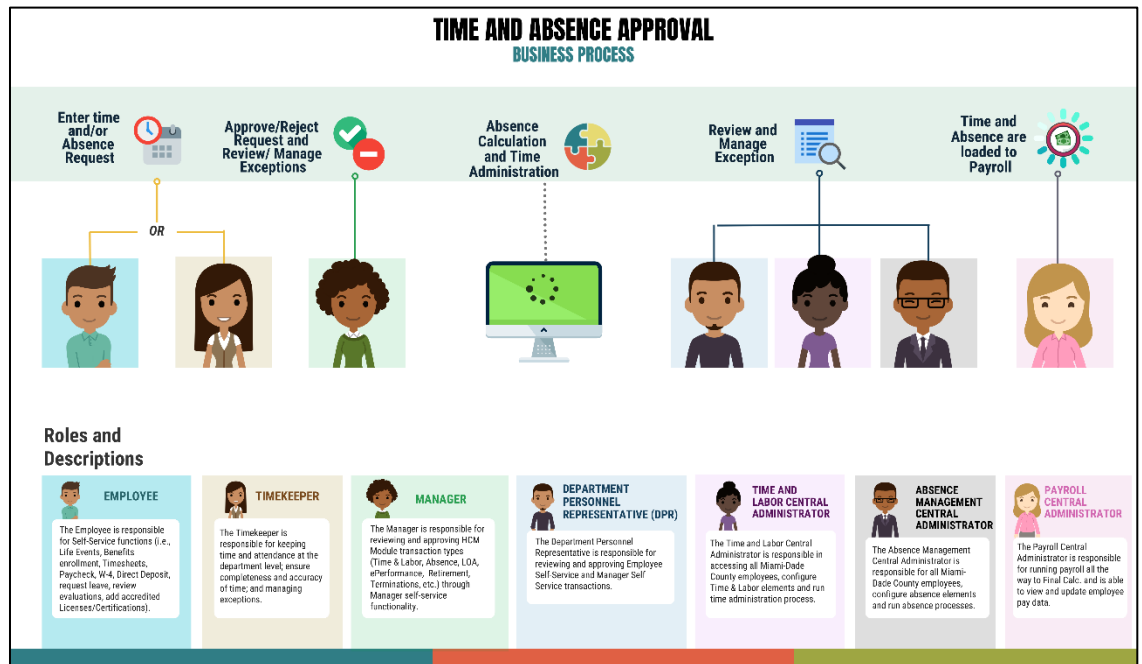
Lesson 3: View Time Exceptions

Lesson 3:
Overview

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

- Understand the difference between high, medium and low severity exceptions.
- View time reporting exceptions.

Lesson 3: View Time Exceptions

Lesson 3:
Introduction

TIME AND ABSENCE APPROVAL
BUSINESS PROCESS

Enter time and/or Absence Request

Approve/Reject Request and Review/ Manage Exceptions

Absence Calculation and Time Administration

Review and Manage Exception

Time and Absence are loaded to Payroll

OR

Roles and Descriptions

EMPLOYEE	TIMEKEEPER	MANAGER	DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)	TIME AND LABOR CENTRAL ADMINISTRATOR	ABSENCE MANAGEMENT CENTRAL ADMINISTRATOR	PAYROLL CENTRAL ADMINISTRATOR
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Lesson 3: View Time Exceptions

Key Terms

The following key terms are used in this Lesson.

Term	Definition
Exceptions	Any time reported that are not in compliance with the Pay Plan or CBA (Collective Bargaining Agreements) rules.
High Exception	Exceptions with a *High* severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted.
Medium Exception	Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Low Exception	Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Payable Time	Time that is ready to be loaded into Payroll.

Lesson 3: View Time Exceptions

Lecture 1: View Time Exceptions

This lesson will review View Time Exceptions.

Exceptions are user- and system-generated warnings and errors that indicate a problem with an employee's reported time or a problem in INFORMS.

The following topics will be reviewed in this lesson:

- Overview of Exceptions
- Review Exceptions

Overview of Exceptions

Exceptions are generated when the reported time has been approved and the Time Administration process has been run. Any reported time that violates system rules will generate an Exception.

If there is an exception on an employee's time, an icon will appear for each day on the tile after the Time Administration process is run.

Exceptions have severity levels:

- *High:* Exceptions with a High severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted.
- *Medium:* Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
- *Low:* Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.

In addition to exception severity levels, there are also exception statuses. The three exception statuses that are available when reviewing exceptions are: *Unresolved, Resolved.*

Lesson 3: View Time Exceptions

Lecture 1: View
Time Exceptions

The following are examples of different types of exceptions that can occur in INFORMS:

Exception ID	Description	Severity
MD_OFFDY	TRC cannot be posted on Off Day	High
TLX00440	TRC is not in TRC Program	High
MDTL004	NGTO exceed OVT	High
MDHOLPTM	HOLEA/HOLPD required	Medium
MDNGTEX4	NGT hours report less than minimum required	Low
MDOCL007	OCL hours may not be reported with Leave hours	Low
MDVALEX2	Less than 80/96 hours reported for the pay period	Low

Lesson 3: View Time Exceptions

Lecture 1: View Time Exceptions

An employee can view an exception.

1. Navigation: **Homepage > Employee Self-Service > Time and Absence > Exceptions**.
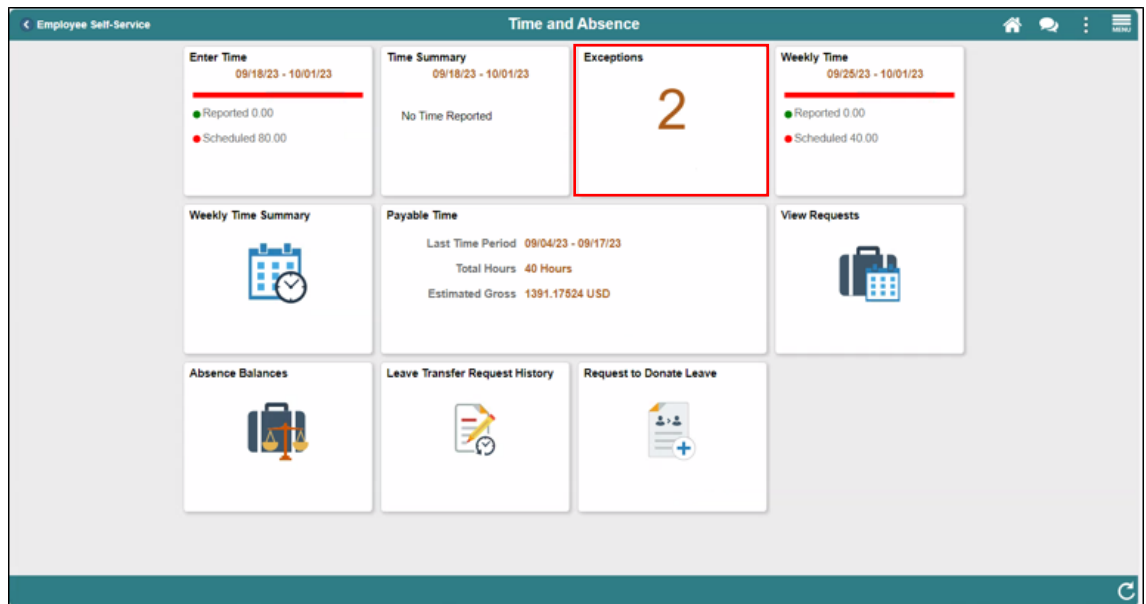
2. Select an exception from the list of exceptions listed.
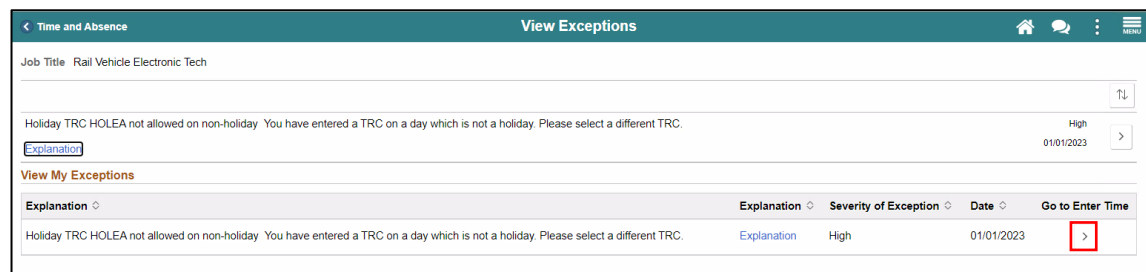
Lesson 3: View Time Exceptions

Lecture 1: View
Time Exceptions

In the Timesheet, an Exceptions icon will display in the day in which the exception is listed.

3. Resolve the exception issue.
   Note: If needed, use the **Add/View Comments** section to provide additional information or to confirm the issue has been resolved. **Add/View Comments** can be accessed using the **Action Arrow** next to the date in the timesheet.

4. Select **Submit.**

Lesson 3: View Time Exceptions

Lecture 1: View
Time Exceptions

5. A **Timesheet Submit Confirmation** page will display, select **OK**.
   Note: Exceptions are not cleared until Time and Absence process is complete in INFORMS.

Lesson 3: Training Activity 1

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

Scenario
Employee worked Overtime and Night Shift for a period and took a sick day

- Employee Submits the hours worked and the absence taken

- Supervisor approves the hours worked and the absence taken

- DPR & Supervisor Manages the exceptions

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. Which level of exception will not generate payable time?
   a) Low level
   b) Medium level
   c) High level
   d) All of the above

2. Exceptions are automatically generated after submitting a timesheet.
   a) *True*
   b) *False*

Lesson 3: Lesson Summary

Objectives
Achieved

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

Understand the difference between high, medium and low severity exceptions.
View time reporting exceptions.
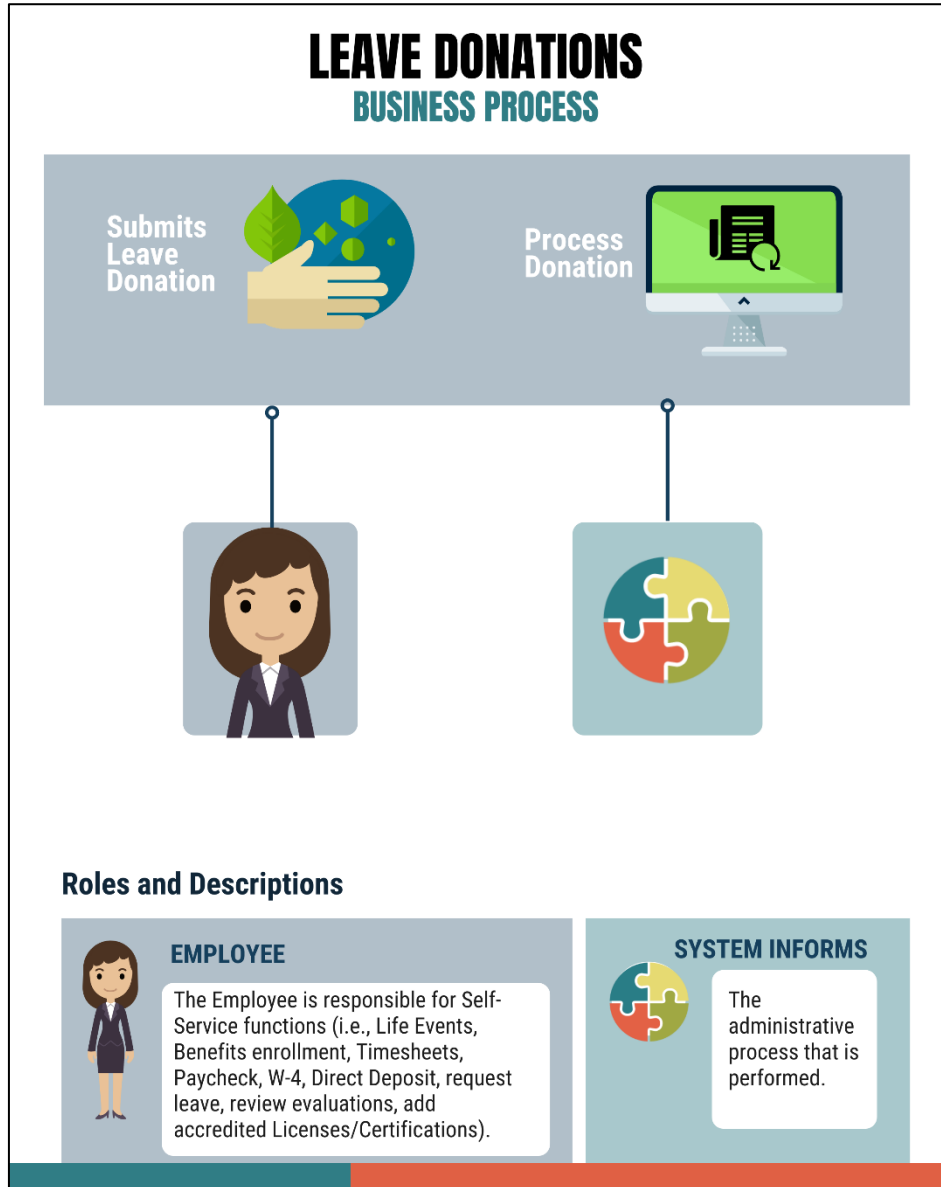
Lesson 4: Leave Donation

Lesson 4: Overview

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

- Understand the Leave Donation Process

- Donate available leave hours to other employees who have exhausted their own leave due to qualifying emergency

- Track Leave Transfer Request History

Lesson 4: Leave Donation

Lesson 4:
Introduction

LEAVE DONATIONS
BUSINESS PROCESS

Submits Leave Donation

Process Donation

Roles and Descriptions

EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

SYSTEM INFORMS

The administrative process that is performed.

Lesson 4: Leave Donation

Key Terms

The following key terms are used in this Lesson.

| Term	Definition
Description	Enter the name of an active leave transfer program.
Category	Leave pool is donated either to an individual, department, or special event.
From Entitlement	Select the entitlement from which you will donate your time. You can only select entitlements that have been defined at the program definition level. For example, select from annual leave any hours you want to donate to the selected leave transfer program.
Balance	Select to access the current Balance Inquiry page to view your balances.
Hours to Donate	Enter the amount of time you want to donate to the selected leave transfer program.
Agreement and Compliance	Select the check box to agree to the terms of the leave transfer program. You cannot submit the request to donate leave time until the check box is selected. You do not need to select the check box when you Select the Save for Later button.

Lesson 4: Leave Donation

Leave Donation

This lesson outlines the following steps on how to donate a leave.

- Navigation: **Homepage > Employee Self-Service > Time and Absence > Request to Donate Leave.**
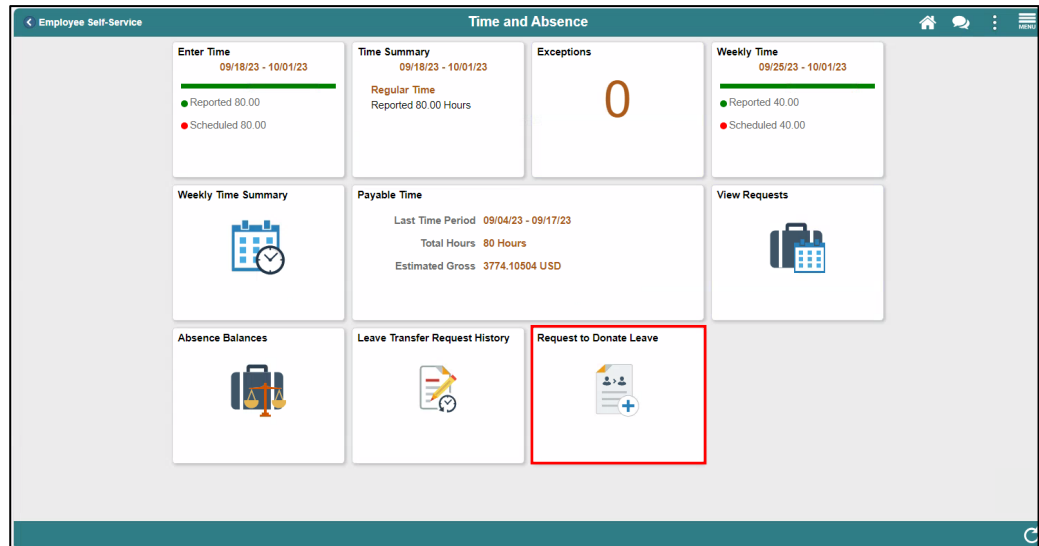
- Select a **Category** and **Program Name**.

Lesson 4: Leave Donation

3. Select an **Entitlement** and provide an **Hours to Donate.**
4. Select the checkbox for **Agreement and Compliance**, and then Select **Submit**.

5. Select **Yes** once prompted for confirmation.

6. Select **OK** once your leave is successfully donated and you will be redirected to the **Leave Transfer Requests History** page.
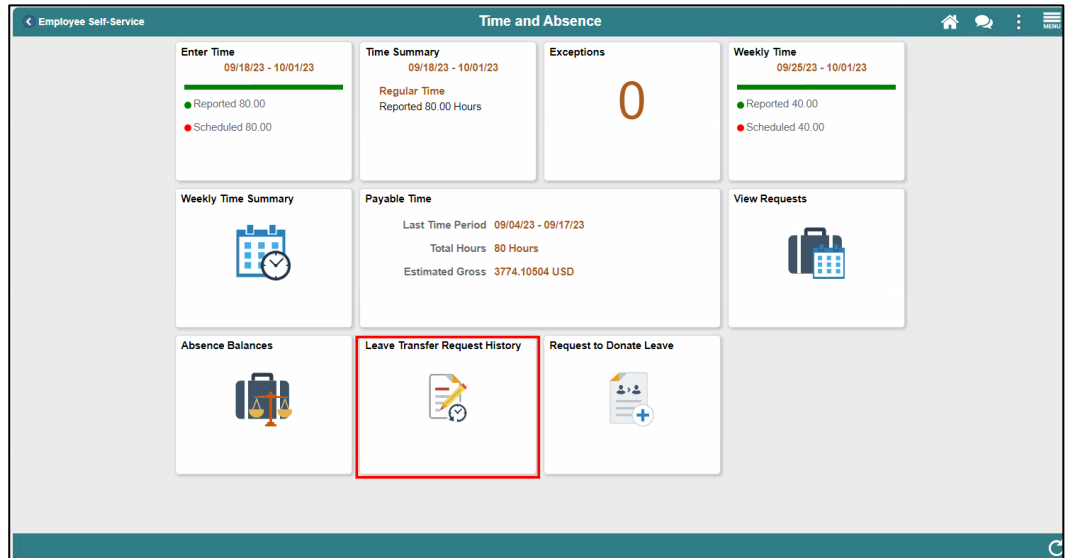
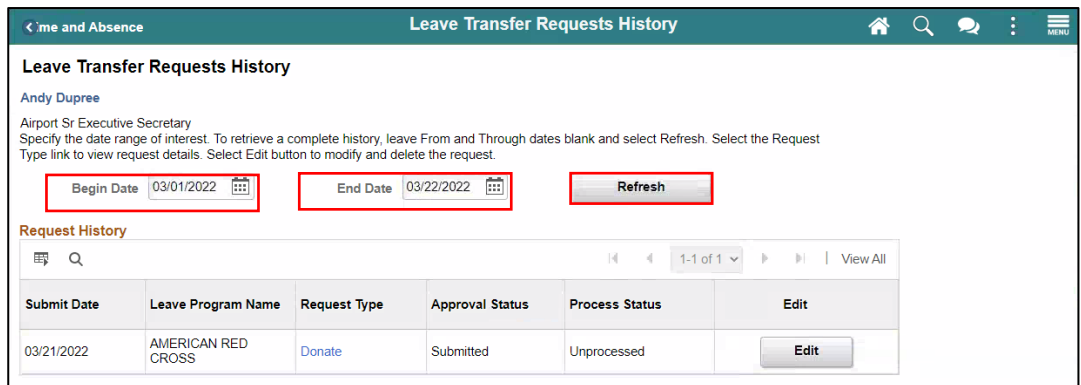## Lesson 4: Leave Donation

Lecture 2: Leave Transfer Request History

Leave Transfer Request History

1. Navigation: **Homepage > Employee Self-Service > Time and Absence > Leave Transfer Request History.**

2. Provide the **Begin Date** and **End Date**, and then Select **Refresh** to view all leave transfer transactions.

Lesson 4: Training Activity 1

Demonstration	The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.
Scenario	An Employee donates leave.
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. Which tile do employee's select to donate leave?
   a) Enter Time
   b) Request to Donate Leave
   c) Leave Transfer Request History
   d) Request Absence
2. Employees are required to donate leave on a weekly basis.
   a) True
   b) False

Lesson 4: Lesson Summary

Objectives Achieved

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

- Understand the Leave Donation Process

- Donate available leave hours to other employees who have exhausted their own leave due to qualifying emergency

- Track Leave Transfer Request History

Module 3: Course Summary

Objectives Achieved

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

- Submit time
- Submit absence
- View time exception
- Donate leaves

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
- Submit Time (Submit Time through Timesheet)
- Submit Time (Adjust Time through Timesheet)
- Submit Absence (Entering an Absence)
- View Time Exceptions (View Exceptions)
- Leave Donations (Donate Leave)
- Leave Donations (View Transferred Leave Request History)

Reference Materials (Cont.)

Reference
Materials

Job Aids:

- N/A

For additional Information:

- www.miamidade.gov/informs

Glossary

Key Terms

The following key terms are used in this course:

Term	Definition
Budget Reference	Used to identify unique budgets, when individual budgets share budget keys and overlapping budget periods.
Fund Code	The primary structural unit of accounting.
Appropriation	Identifies the specific appropriation for the ChartField.
Account	Classifies the nature of a transaction.
Reported Time	Time as it is entered on the timesheet. This is what supervisors will approve.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements and overtime.
Time Administration	INFORMS system process to trigger all the rules and generate exceptions.
Time Reporting Template	Determines fields used for time entry. There is an elapsed Time Report Template and a punch Time Reporting Template.
Time Reporter Type	Determines the information an employee must provide for work hours on the timesheet, Punch or Elapsed

Glossary

Key Terms

The following key terms are used in this course:

Term	Definition
Absence Event	The period for which an employee is absent for the same reason.
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial.
Absence Balance	Leave balance available for the employee to use.
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Request	Method of entering leave, includes an Absence Type and Date(s).
Absence Take	Type of leave requested, linked to one or multiple TRC(s) (Time Reporting Code) in T&L (if cascading).
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.
Exceptions	Any time reported that are not in compliance with the Pay Plan or CBA (Collective Bargaining Agreements) rules.

Glossary

Key Terms

The following key terms are used in this course:

Term	Definition
High Exception	Exceptions with a High severity level must be resolved in order for the reported time associated with the exception to become payable time. Data must be changed in the timesheet and re-submitted.
Medium Exception	Medium severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Low Exception	Low severity exception will produce payable time but will remain on the Exceptions Table until the exception is resolved.
Payable Time	Time loaded into payroll.
Description	Enter the name of an active leave transfer program.
Category	Leave pool is donated either to an individual, department, or special event.
From Entitlement	Select the entitlement from which you will donate your time. You can only select entitlements that have been defined at the program definition level. For example, select from annual leave any hours you want to donate to the selected leave transfer program.
Balance	Select to access the current Balance Inquiry page to view your balances.
Hours to Donate	Enter the amount of time you want to donate to the selected leave transfer program.
Agreement and Compliance	Select the check box to agree to the terms of the leave transfer program. You cannot submit the request to donate leave time until the check box is selected. You do not need to select the check box when you Select the Save for Later button.