Miami-Dade County

End-User Training Guide

Course Code: MSS 205
Course: Manager Self Service - ePerformance Management (Employee Performance Evaluation)

Course Overview

Course Description	This course provides a comprehensive review of the ePerformance Management processes.
	This course consists of the following modules:
	• Module 1: Course Introduction
	• Module 2: ePerformance Management
	• Module 3: Course Summary
Training Audiences	The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:
	• Managers
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 Manager Self-Service:
	• MSS 204 - Manager Self Service - Time Management
	• MSS 206 - Manager Self Service - Updating Team Information
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 4 Hours

Course Outline	
Content	Page

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
- Key Terms

Module 1: Course Introduction

Course Administration and Logistics

To get the most benefit from this course, participants should:

- 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:

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

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:

- **Manager**: 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.
- **Nominee**: The Nominee is responsible for providing additional feedback on an employee's evaluation and is nominated by the Employee's manager for this purpose. The Nominee is able to provide additional commentary relating to the Employee's performance.

Module 1: Course Introduction

Navigation

Below are the steps to navigate to Manager Self-Service, which will be used for navigation in the rest of this course:
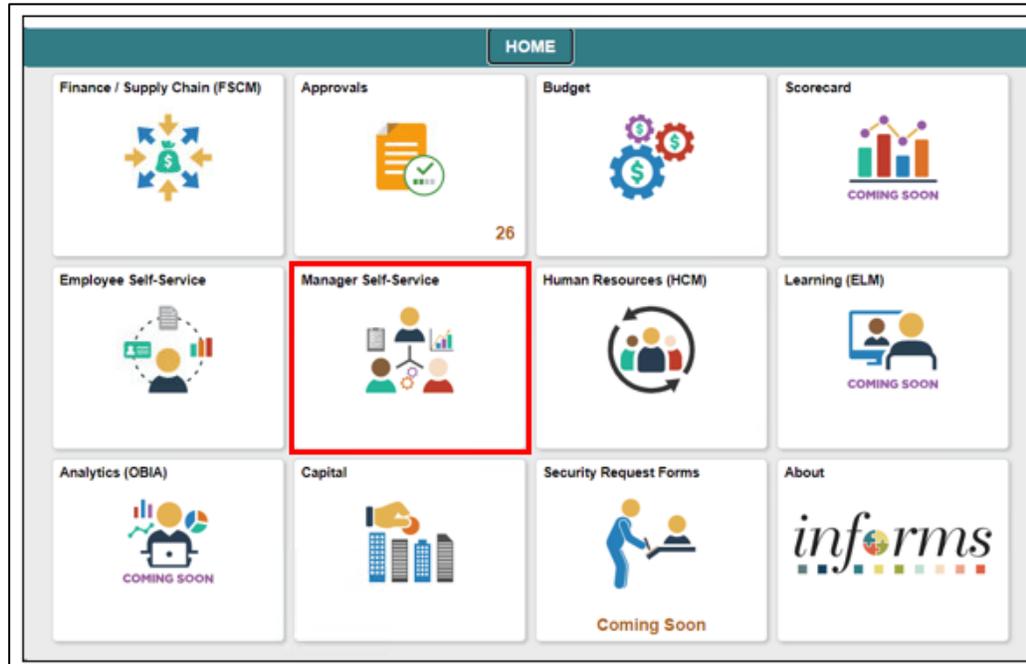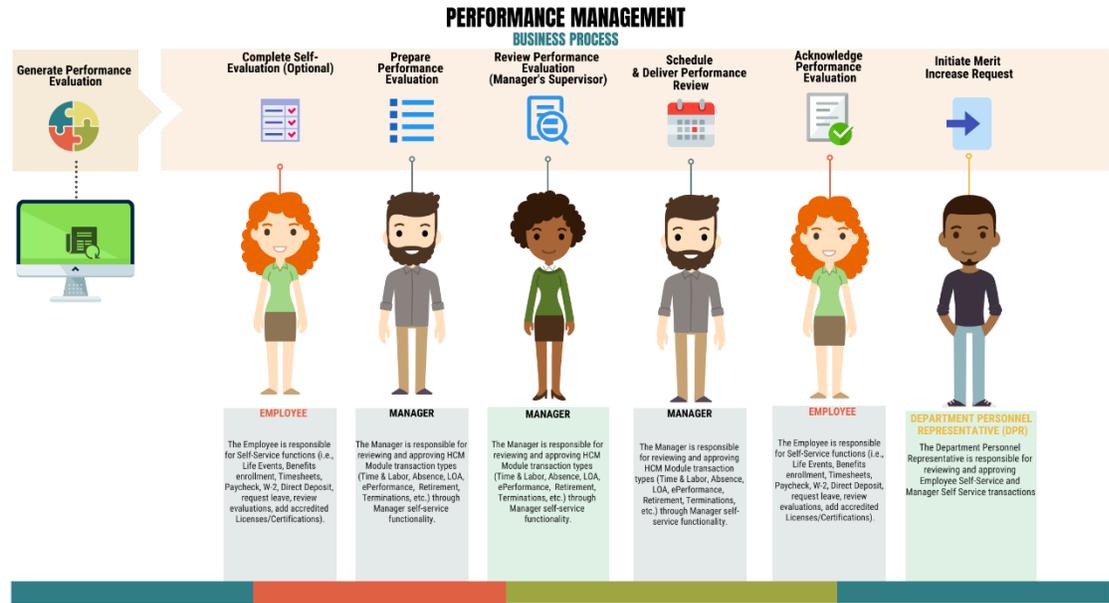
Module 1: Course Introduction

Purpose and Benefits of the Business Process

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

- Automation of County business processes
- Data persistence – INFORMS data is never deleted, only past-effective dated
- Decreased data redundancy - Perform all performance evaluation administration activities in a single common system (INFORMS) - eliminating manual data re-keying and, in so doing, reducing data entry errors, and improving data quality
- Employee empowerment - employee self-service and manager self-service interfaces are intuitive, easy to use and available on demand on multiple devices and platforms
- Enhanced data retrieval - rapid standard and ad hoc report development and deployment capabilities
- Improve workforce efficiency via collaborative processing – reviewers and approvers
- Logical separation of duties
- Robust technical platform – high on-demand availability with minimum downtime, scalable and extensible, rapid deployment of system upgrades, continuous improvement, iterative development, data security
- Streamlined operations - Automated email notifications, approval routing, consistent business process between Departments, electronic signatures, reduced processing time with online transaction processing, rapid data retrieval via ad hoc query capability, seamless integration between County systems
- Workforce resource processing effort smoothing – Performance reviews business process is driven by anniversary dates, in accordance with bargaining agreement rules.

Module 1: Course Introduction

The End-to-End Business Process

PERFORMANCE MANAGEMENT
BUSINESS PROCESS

Generate Performance Evaluation	Complete Self-Evaluation (Optional)	Prepare Performance Evaluation	Review Performance Evaluation (Manager's Supervisor)	Schedule & Deliver Performance Review	Acknowledge Performance Evaluation	Initiate Merit Increase Request
	EMPLOYEE	**MANAGER**	**MANAGER**	**MANAGER**	**EMPLOYEE**	**DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)**
	The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).	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 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 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 Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions

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.

Activity 1: 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.

Activity 2: 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.

Activity 3: 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: ePerformance Management

Module 2: ePerformance Management

This module includes the following lessons:

- Manager Requests Nominations (optional)
- Manager Prepares Employee's Evaluation
- Manager's Supervisor Reviews Employee's Evaluation (Reviewer)
- Manager shares evaluation with employee

INFORMS replaces Miami-Dade County legacy systems and consolidates all County Performance Evaluation activities on a single integrated Human Resources (HCM) platform.

Managers, Employees, Reviewers and Department Personnel Representatives (DPRs) use INFORMS for performance evaluation administration.

- Managers use INFORMS to develop, approve, and deliver Performance Evaluations to Employees.
- Employees use INFORMS to perform self-evaluations and acknowledge their Performance Evaluations.
- Reviewers navigate to their Worklist to approve Performance Evaluations.
- DPRs use INFORMS to generate Performance Evaluation documents, initiate Merit Increases when applicable, run Performance Evaluation Reports, and perform Administrative Tasks.
- Employees and Supervisors will receive email notifications when documents are created, submitted, approved and complete.
- DPRs use INFORMS to generate a performance improvement plan, which enables management to develop and create electronic documents to develop employees.

INFORMS Performance Evaluation Documents are used to support Miami-Dade County's performance reviews. INFORMS Performance Evaluation Documents are generated automatically or created manually.

This module will review Completing evaluation (Manager, Manager's Supervisor (Reviewer). Let's review how each group completes Performance Evaluations in INFORMS.

- Employees complete a self-evaluation and submit it to their Manager.
- The Employee's Manager then prepares their Performance Evaluation and submits it to the Reviewer for approval.
- INFORMS routes an email notification to the Manager once the Reviewer has approved their Manager's Performance Evaluation.
- The Manager will then schedule time to meet with the Employee to discuss their performance evaluation.
- The Employee acknowledges their Performance Evaluation.

Module 2: ePerformance Management

Module 2: ePerformance Management

There are two steps in the INFORMS Performance Evaluation Process: Complete Self Evaluation and Review Manager Evaluation.

Step 1: Complete Self Evaluation (optional)

The Employee completes the Self-Evaluation and adds their accomplishments to the Self Evaluation document.

When finished, the Employee selects "Complete".

INFORMS routes the Employee's Self Evaluation document to their Manager for review.

Step 2: Review Manager Evaluation

The Manager will then complete the various sections of the employee's evaluation and submit for approval by the Manager's Supervisor.

After the document is approved by the Manager's supervisor, the Manager shares their comments with the Employee and conducts a Performance Review.

Next, the Manager requests that the Employee acknowledge their performance review document in INFORMS.

Once the Employee's evaluation has been acknowledged and completed, INFORMS updates the performance document's status to Complete. The Employee's completed performance evaluation document will be located in INFORMS under Historical Documents.

This Lecture reviews requesting nominations, preparing the employee's evaluation as a manager, and reviewing the employee's evaluation as the manager's supervisor. All Performance Evaluation activity takes place in INFORMS. Documents are automatically generated based off anniversary dates and routed six weeks prior to their performance anniversary date. The DPR can generate an evaluation at any point, as needed after the employee has worked 26 pay periods.

Lesson 1: Requesting Nominations

Lesson 1:
Overview

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

- Nominate Participants to provide additional feedback on an employee's evaluation
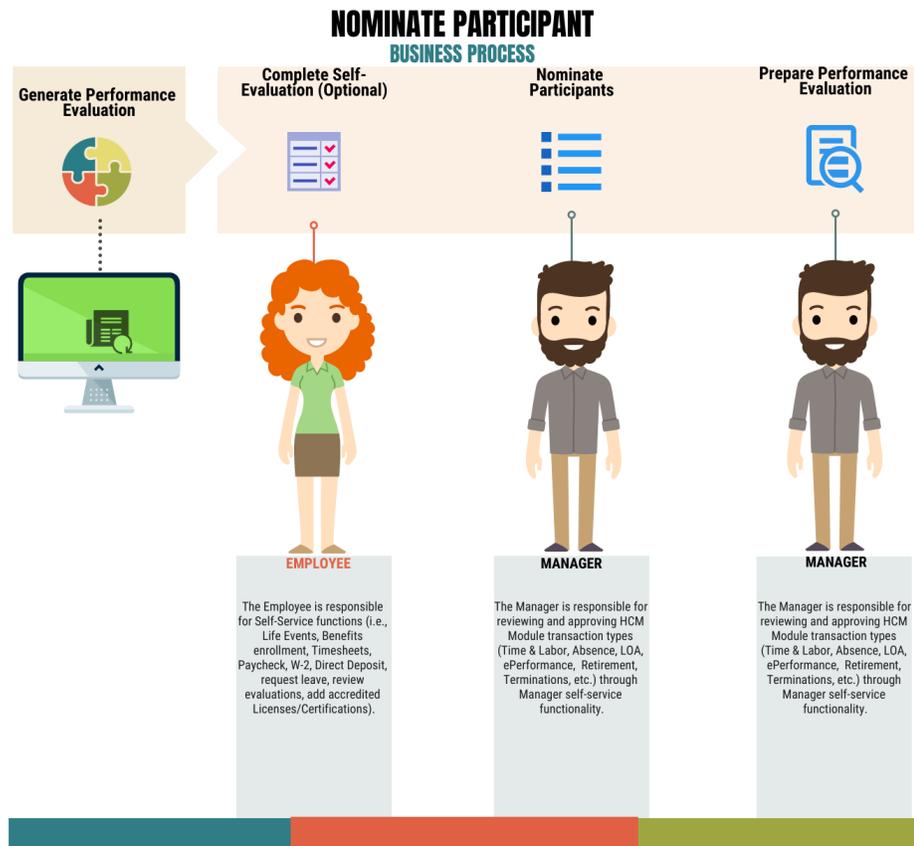
Lesson 1: Requesting Nominations

Key Terms

The following key terms are used in this lesson:

Term	Definition
Nomination	Inviting individuals other than the manager and employee to provide direct feedback into an employee's performance.

Lesson 1: Requesting Nominations

Lesson 1:

Introduction

NOMINATE PARTICIPANT
BUSINESS PROCESS

Generate Performance Evaluation	Complete Self-Evaluation (Optional)	Nominate Participants	Prepare Performance Evaluation

EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

MANAGER

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.

MANAGER

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.

Lesson 1: Requesting Nominations

Lesson 1:

Requesting Nominations

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

1. Select the **Employee Name** under **Current Documents**.
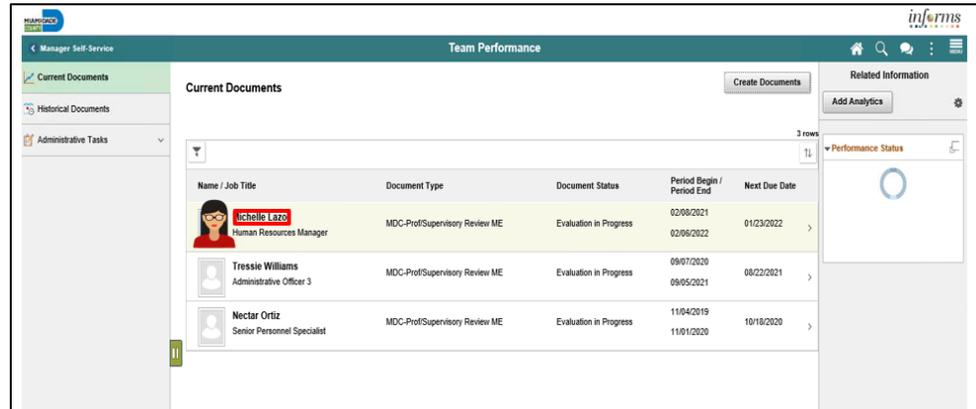
2. Select the **Nominate Participants** hyperlink.
3. Select the **Add Nominees** hyperlink.
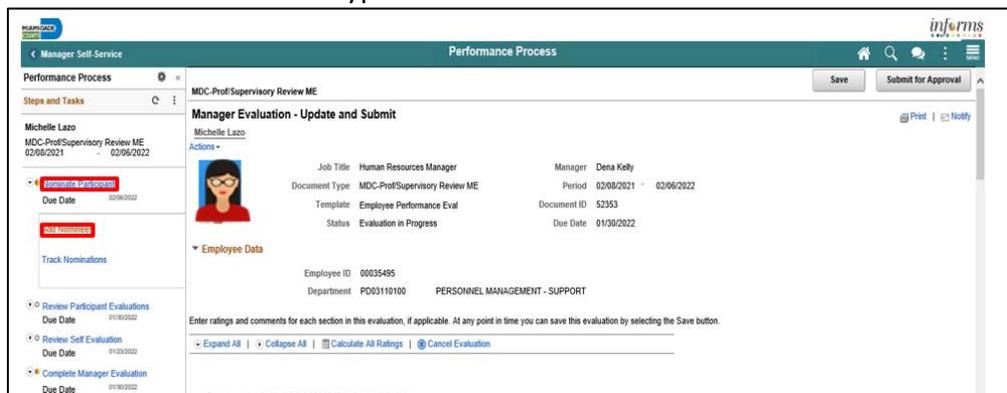
4. Select the **Add Participants** hyperlink.
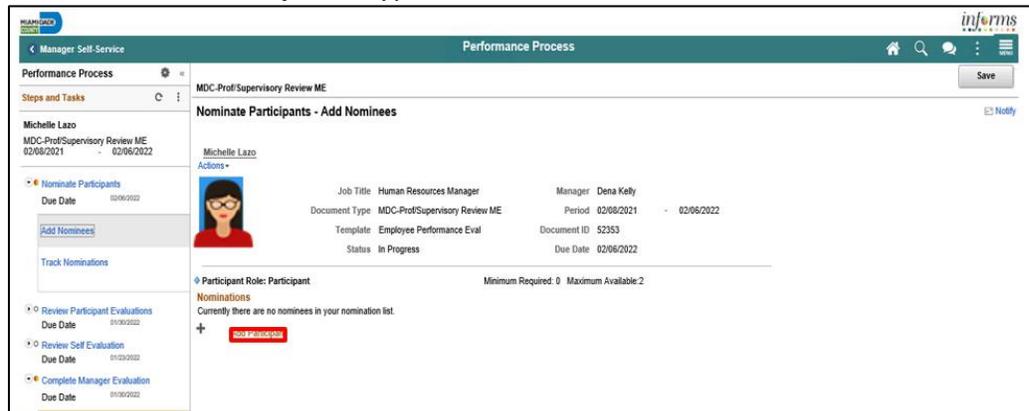
Lesson 1: Requesting Nominations

Lesson 1:

Requesting

Nominations

5. Input applicable **Search Criteria**.
6. Select the **Search** button.
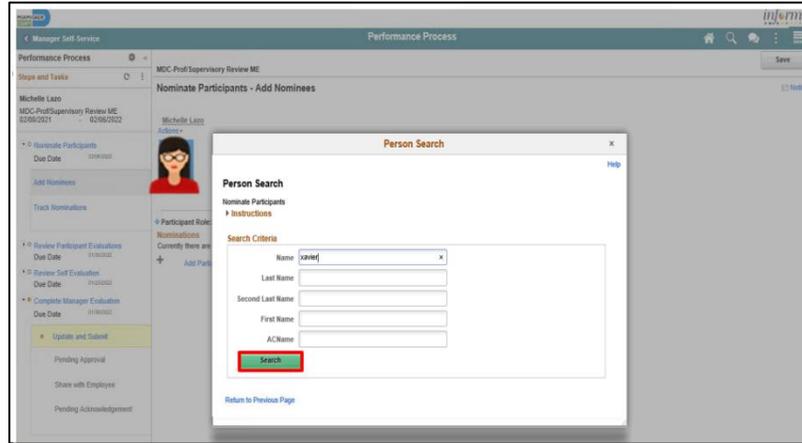
7. Select the checkbox beside the applicable search result.
8. Select the nominee and then the **OK** button.
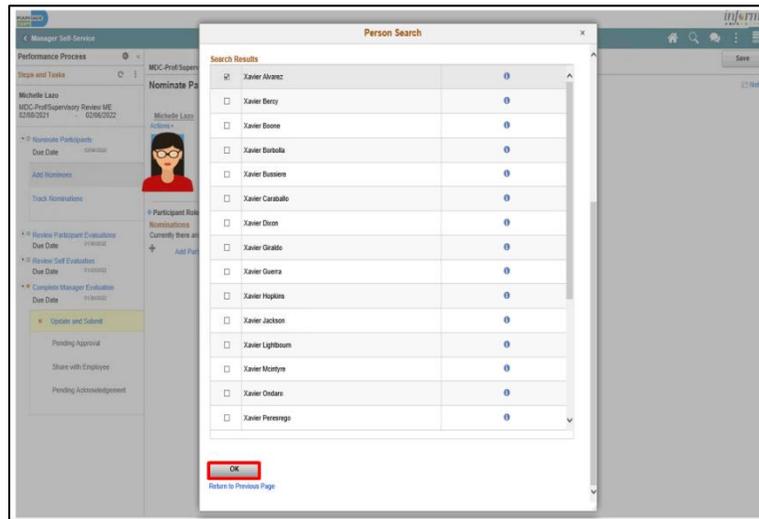
9. Select the **Submit Nominations** button.
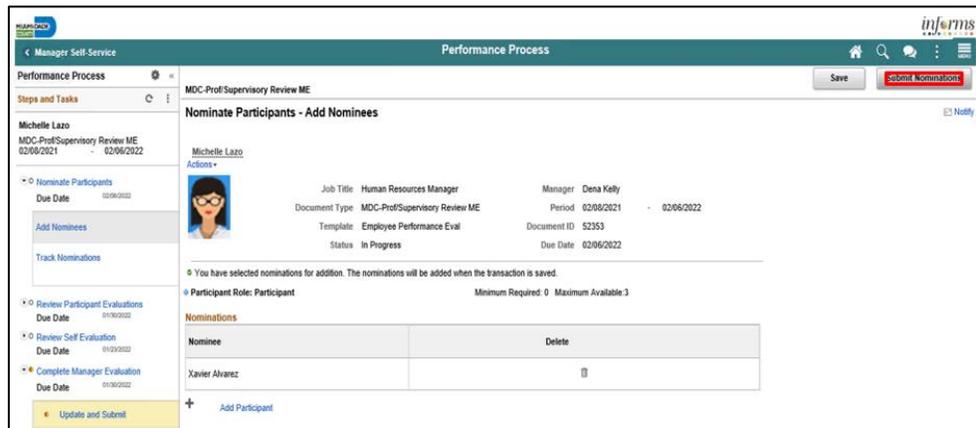
10. Select the **Confirm** button. **Note:** you will have the ability to track the status of the nominee's input.

Lesson 1: Training Activity 1

Demonstration

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

Scenario

You will nominate an additional preparer on the employee's evaluation.

Instructions

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

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

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

Relevant Resources

Remember, you have the following resources available to you:

- Training Activity Sheet
- User Productivity Kit (UPK)

Lesson 1: Training Exercise 1

Debrief

1. (True / False) You should always nominate an additional preparer to provide feedback on the employee's performance.

Lesson 1: Requesting Nominations

Objectives
Achieved

Having completed the requesting nominations lesson, the user should be able to

- Nominate Participants to provide additional feedback on an employee's evaluation

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

Lesson 2:
Overview

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

- Prepare an Evaluation as a Manager

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

Lesson 2: Introduction
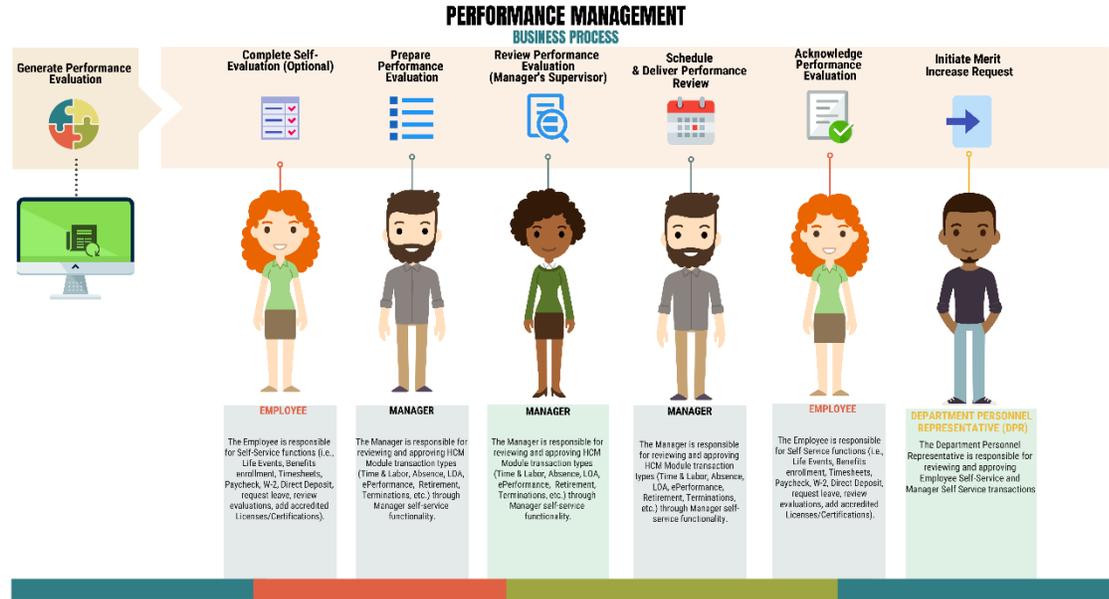
Managers must complete an annual performance evaluation for their employees in Miami Dade County. Managers must rate their employees on four or seven objectives. An Overall Rating is generated by INFORMS and is based on an average of the individual ratings. The rating model for both the individual objectives and the overall objective is the same:

1   – Unsatisfactory
1   – Needs Improvement
2   – Satisfactory
3   – Above Satisfactory
4   – Outstanding
X   – Does not apply

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

Key Terms

The following key terms are used in this lesson:

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

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

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

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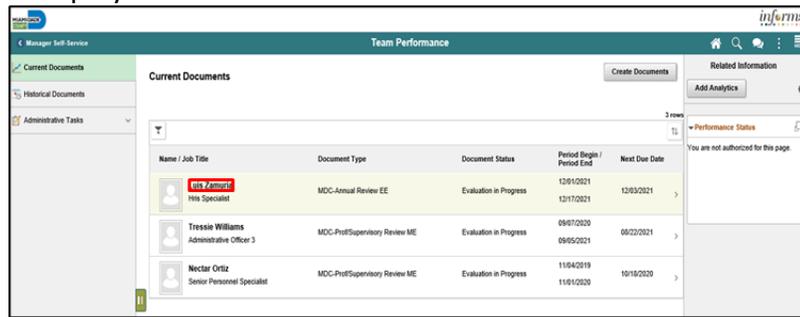

Note: The Current Performance Documents Page displays documents that are currently listed as "In Progress".

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

Complete the following for each segment within **Section 1 – PERFORMANCE OBJECTIVES**

2. Select the applicable **Manager Rating** from the dropdown.
3. Input the applicable details within the **Manager Comments** field.
4. Select the **Spell Check** option, if desired.
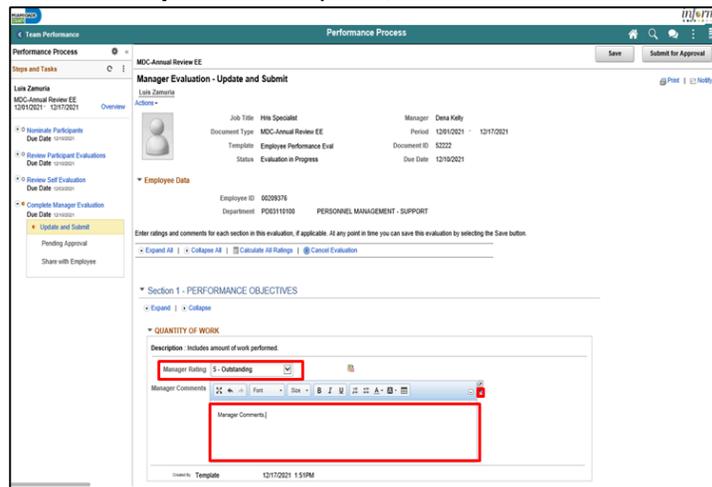
5. Complete **Section 2 -** Overall **Summary Section**

Note: The Overall Score is an automatic calculation of the employee's overall performance score. Select the calculator icon to calculate the overall score.

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

6. Input **Manager Comments** in the **Section 3 - Ways an Employee Can Improve** section.
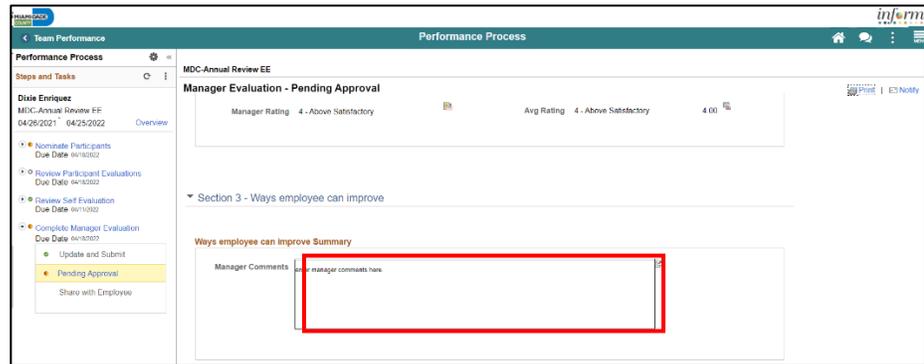
7. Review details input by the employee and add comments within **Section 4 – Employee Comments / Accomplishments.**

Note: To add any applicable attachments, select the Add Attachment hyperlink.
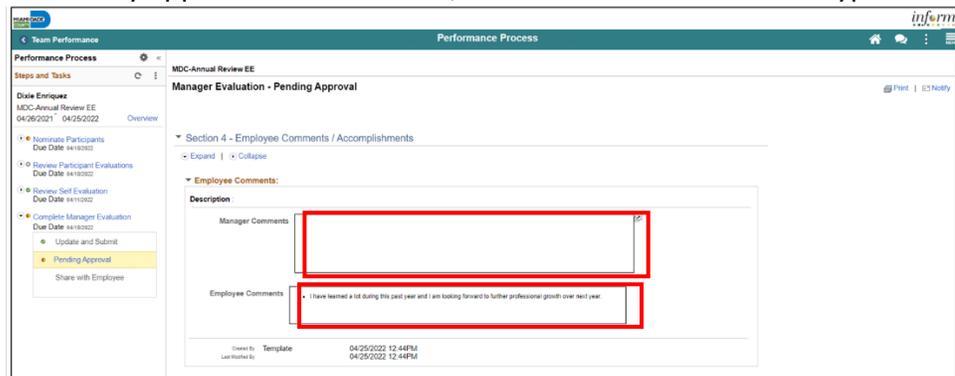
8. Select the **Save** button.
9. Select the **Submit for Approval** button. The evaluation gets routed to the Reviewer.
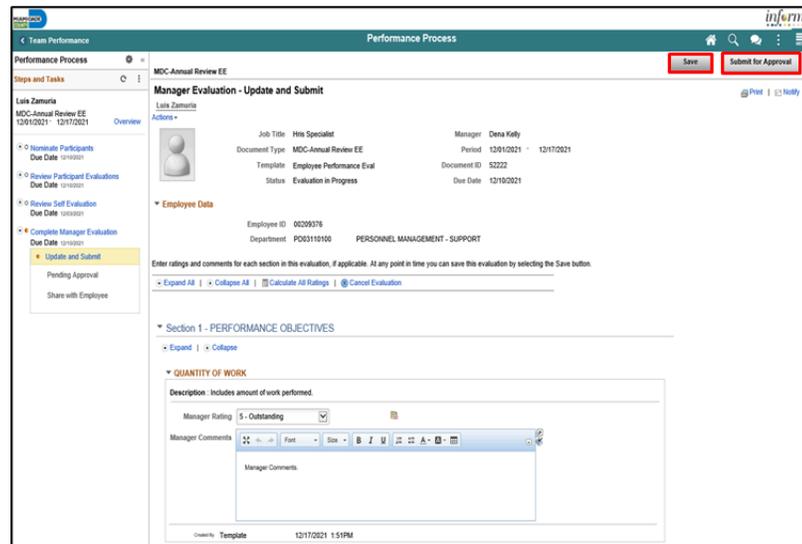
Select the **Confirm** button.

Lesson 2: Training Activity 1

Demonstration

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

Scenario

Manager prepares an evaluation for an employee.

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.

Relevant Resources

Remember, you have the following resources available to you:

- Training Activity Sheet
- User Productivity Kit (UPK)

Lesson 2: Training Exercise 1

Debrief

1. Does the manager create the annual performance evaluation for their employee?

   _____

   _____

   _____

   _____

2. Can the Manager modify the Overall Rating?

   _____

   _____

   _____

   _____

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

Objectives
Achieved

Having completed the requesting nominations lesson, the user should be able to

- Preparing an Employee's Evaluation as a Manager

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

Lesson 3:
Overview

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

- Review an Employee's Evaluation as a Manager's Supervisor

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

Lesson 3:
Introduction
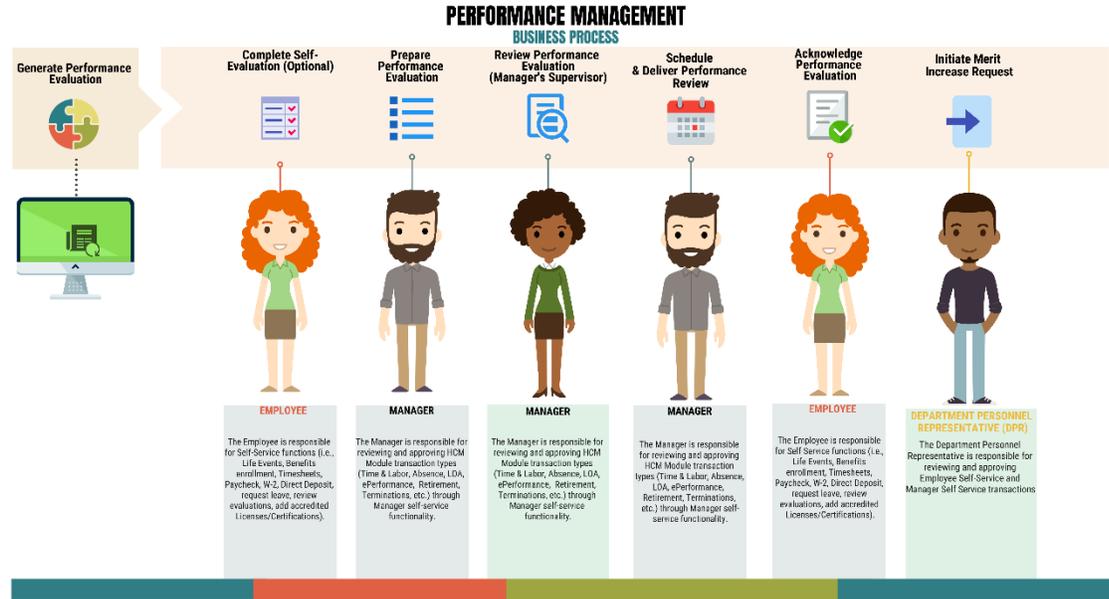
INFORMS will provide an email notification for the Reviewer to review and approve the performance evaluation and embedded in that email will be a link to access the document. The reviewer can also view the document in their approvals tile in INFORMS.

Note: The Reviewer cannot edit the evaluation. The Reviewer can only provide comments when approving or denying the evaluation.

INFORMS will display a confirmation message once the Reviewer has approved the Performance Evaluation then route an email notification to the Manager.

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

Key Terms

The following key terms are used in this lesson:

Term	Definition
Performance Evaluation	A annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for Merit Increases.

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

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

Navigate to the **Approvals** tile.

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


3. Select the **View Performance Detail** link.
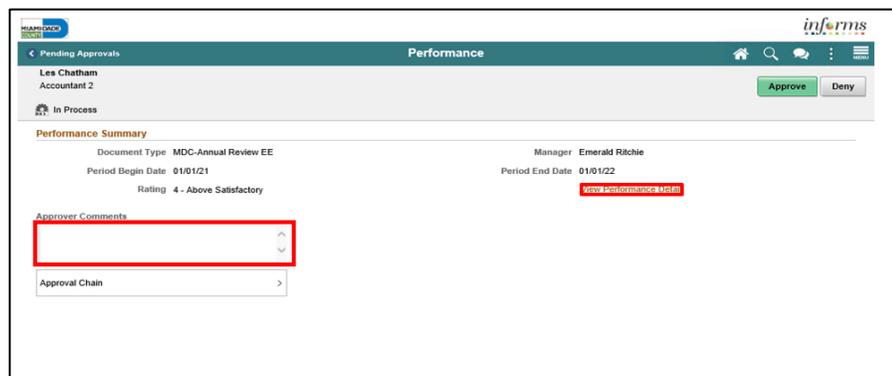
4. Review all sections of the performance evaluation document and check to see if the document contains any attachments.
5. Once the Reviewer has reviewed the entire performance evaluation, select the Approval button on the top left corner of the screen.
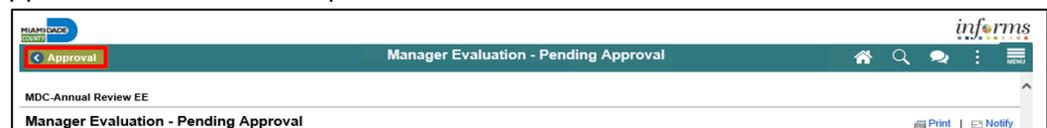
Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

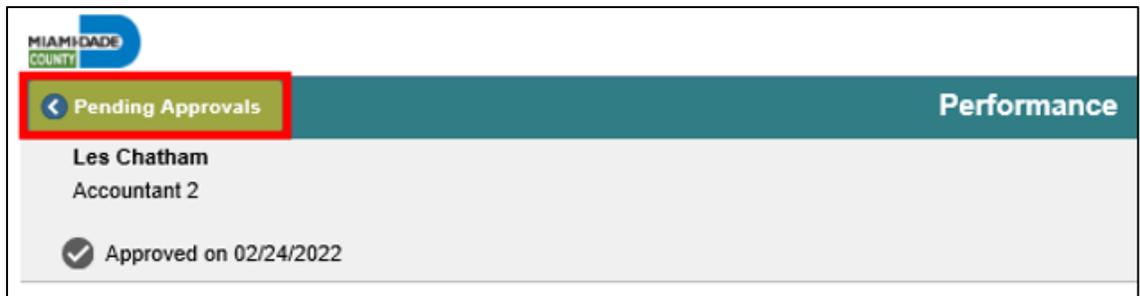Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

6. Select the **Approver Comments** field and enter desired information. Once desired information is entered, click on **Approve** button. Note, the reviewer also has the option to deny in which case the reviewer would provide the reasons for denial. At this point the document will route back to the Rater (employee's manager) to be amended and the Rater will then have to resubmit the evaluation to the Reviewer.
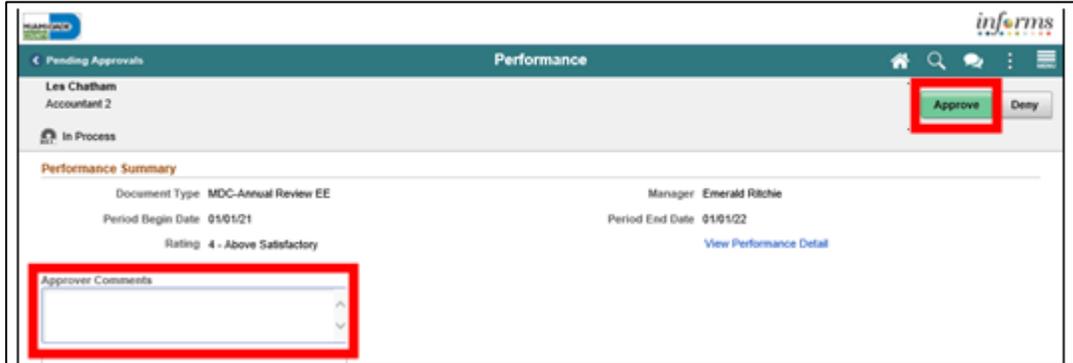
7. Select the **Submit** button.

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

Lesson 3: Training Activity 1

Demonstration

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

Scenario

Manager's Supervisor reviews the employee's evaluation.

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.

Relevant Resources

Remember, you have the following resources available to you:

- Training Activity Sheet
- User Productivity Kit

Lesson 3: Training Exercise 1

Debrief

1. (True / False) The employee is able to view the comments made by the Reviewer

    _____

    _____

    _____

    _____

2. (True / False) The Manager's Supervisor reviewing the evaluation does not have the option to deny the evaluation

    _____

    _____

    _____

    _____

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

Objectives
Achieved

Having completed the requesting nominations lesson, the user should be able to

- Review an Employee's Evaluation (Manager's Supervisor)

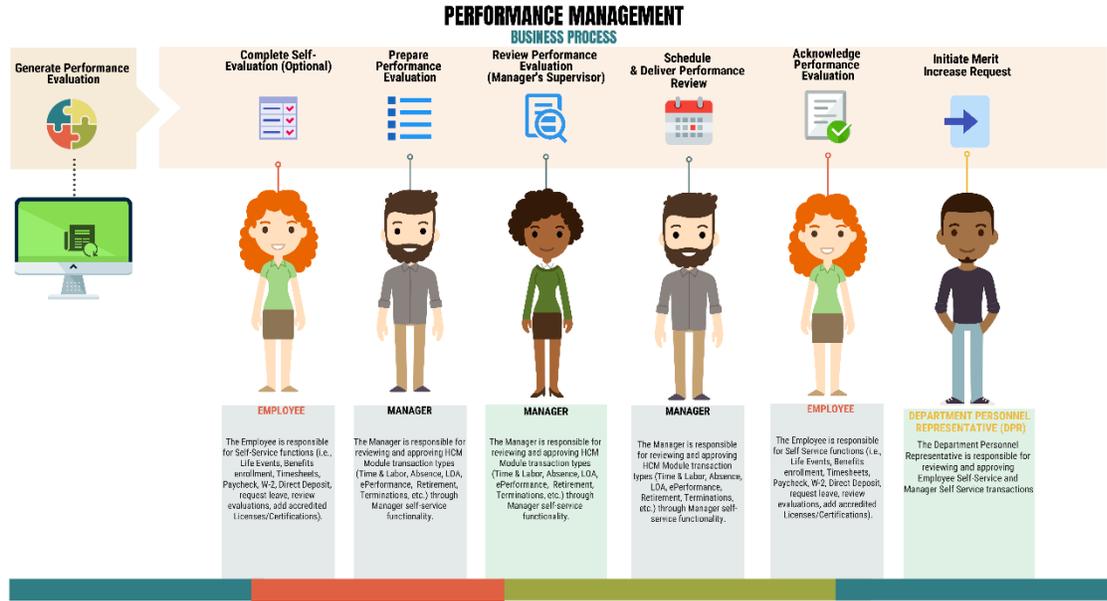## Lesson 4: Share an Evaluation with Employee as Manager

Lesson 4: Overview

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

- Share Evaluation with Employee as a Manager

Lesson 4: Share an Evaluation with Employee as Manager

Lesson 4:
Introduction

PERFORMANCE MANAGEMENT
BUSINESS PROCESS

Lesson 4: Share an Evaluation with Employee as Manager

Key Terms

The following key terms are used in this lesson:
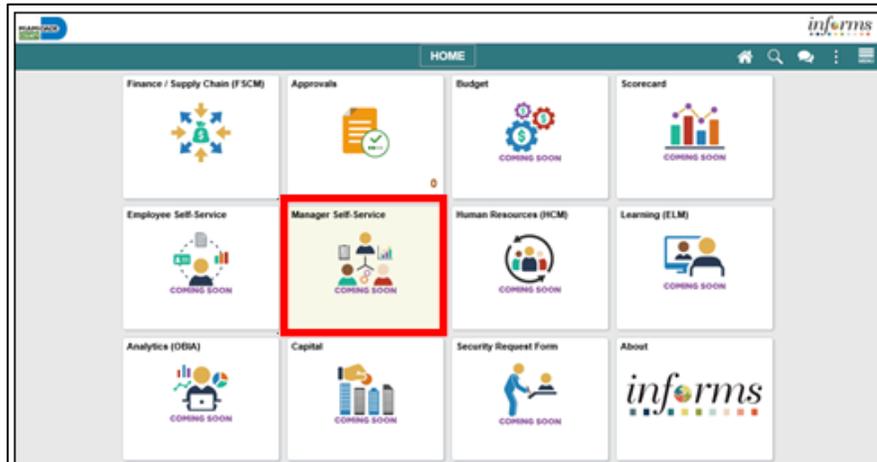
| Term	Definition
Performance Evaluation	A annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for Merit Increases.

Lesson 4: Share an Evaluation with Employee as Manager

Lesson 4:
Share an
Evaluation with
Employee as
Manager

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

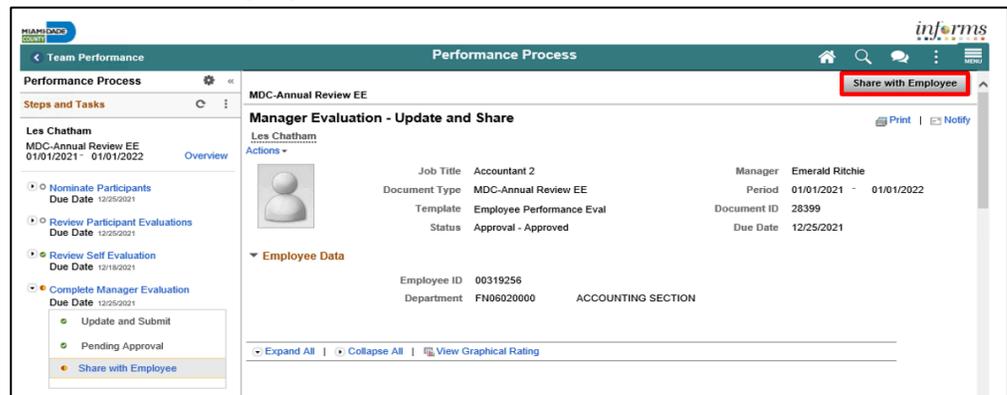1. Select **Current Document** and then **MDC-Annual Review EE**.
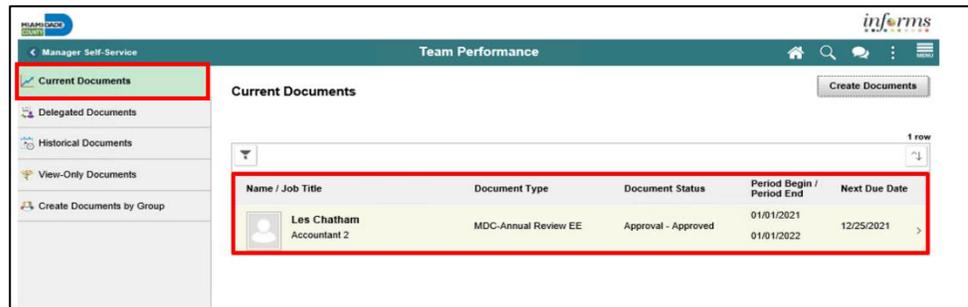
2. Select **Share with Employee.**

Lesson 4: Share an Evaluation with Employee as Manager

3. Select the **Confirm** button. This will complete the process.

The evaluation will close out (edits can no longer be made) and move to the employee's historical folder as well as the manager's historical folder.

Lesson 4: Training Activity 1

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

Scenario   Manager shares the evaluation with the employee.

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.

Relevant Resources   Remember, you have the following resources available to you:

- Training Activity Sheet
- User Productivity Kit (UPK)

Lesson 4: Training Exercise 1

Debrief

1. (True / False) Once the Manager has shared the completed evaluation with the employee, should the Manager need to edit the evaluation, he can do so.

Lesson 4: Share an Evaluation with Employee as Manager

Objectives
Achieved

Having completed the Completing an Evaluation lesson, the user should be able to:

- Share Evaluation with Employee as a Manager

Module 2: Course Summary

Objectives
Achieved

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

- Nominate Participants to provide additional feedback on an employee's evaluation
- Prepare an Evaluation as a Manager
- Review an Employee's Evaluation as a Manager's Supervisor
- Share Evaluation with Employee as a Manager

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

Module 3: Course Summary

Module 3: Course Summary

This module includes the following lessons:

- Reference Materials

- Glossary of Terms

Reference Materials

Reference
Materials

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

INFORMS Training Webpage:

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

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

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

Job Aids (Available on the INFORMS Training Webpage):

- Manager Self-Service Training Guide
- Employee Self-Service Training Guide

Glossary

Key Terms

The following key terms are used in this course:

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