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	Participants can attend the other related courses to Manager Self-Service:
Courses	 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.
Ectimated	The total duration of this course, when delivered through Instructor-led Training, is
Duration	4 Hours

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Course Outline

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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

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Module 1: Course Introduction To get the most benefit from this course, participants should: Course Administration Actively participate in class, and ask questions as needed • and Logistics

- Please turn off cell phones, and refrain from the use of email and the Internet •
- Take breaks as scheduled and return to the classroom promptly •



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

- Objectives
- 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



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

- **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.



Navigation

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

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Finance / Supply Chain (FSCM)	Approvals	Budget	Scorecard
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Employee Self-Service	Manager Self-Service	Human Resources (HCM)	Learning (ELM)
.			
Analytics (OBIA)	Capital	Security Request Forms	About
		Coming Soon	informs



Purpose and Benefits of the	The purpose and benefits of the INFORMS Manager Self-Service business process include:
Business Process	 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 rekeying 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 Bobust technical platform – bigh on-demand availability with minimum downtime
	 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.

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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 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



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Module 1: T 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:There are two steps in the INFORMS Performance Evaluation Process: Complete SelfePerformanceEvaluation and Review Manager Evaluation.

Management 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.

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Lesson 1: Requesting Nominations

Lesson 1: At the conclusion of this lesson, you will be able to:

Overview

• 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:



Lesson 1: Requesting Nominations





Lesson 1: Requesting Nominations

Lesson 1: Navigate to Manager Self-Service > Team Performance

Requesting Nominations

1. Select the Employee Name under Current Documents.

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Administrative Tasks	~	Ŧ					3 rows	✓ Performance Status	
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		tichelle Lazo Human Resources Manager	MDC-Prof/Supervisory Review ME	Evaluation in Progress	02/08/2021 02/06/2022	01/23/2022	>		
		Tressie Williams Administrative Officer 3	MDC-Prof/Supervisory Review ME	Evaluation in Progress	09/07/2020 09/05/2021	08/22/2021	>		
		Nectar Ortiz Senior Personnel Specialist	MDC-Prof/Supervisory Review ME	Evaluation in Progress	11/04/2019 11/01/2020	10/18/2020	>		

- 2. Select the Nominate Participants hyperlink.
- 3. Select the **Add Nominees** hyperlink.

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Track Nominations	Employee Data Employee ID 00035465 Department POD110100 PEDSCANJEL MANAGEMENT _SUBPORT	
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O Review Self Evaluation Due Date 01/23/2022	Expand All Collapse All Colcutate All Ratings @ Cancel Evaluation	
Complete Manager Evaluation Due Date D1/00/2022		

4. Select the Add Participants hyperlink.

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Nominate Participants Due Date Add Nominees	Job Title Human Resources Manager Manager Dena Kehy Document Type MDC-ProfSupervisory Review ME Period 02082021 - 02062022 Template Engloyee Performance Eval Document 10 52353 Status In Progress Due Date 02062022		
Track Nominations Creview Participant Evaluations Due Date encourse Creview Self Evaluation Due Date encourse Complete Manager Evaluation Due Date encourse	Participant Role: Participant Minimum Required: 0 Maximum Available 2 Nominations Currently there are no nominees in your nomination list. + expressionsplat		



Lesson 1: Requesting Nominations

Lesson 1:

Input applicable Search Criteria.
 Select the Search button.

Requesting Nominations

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Share with Employee Pending Acknowledgement		Return to Previous Page					

- 7. Select the checkbox beside the applicable search result.
- 8. Select the nominee and then the **OK** button.

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9. Select the Submit Nominations button.

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O Review Participant Evaluations Due Date 01000000 Oronoso Oronoso De Date 01001000 Oronoso Oronoso Oronotete Manager Evaluation	Participant Role: Participant Nominations Xavier Alvanez	Minimum R	equired: 0 Maximum Available:3 Delete			
Due Date Ordev2022 Update and Submit	+ Add Participant					

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 The Instructor will now demonstrate how to execute the business process through the Demonstration INFORMS training environment. Scenario You will nominate an additional preparer on the employee's evaluation. This activity will be performed individually; you must complete it on your classroom Instructions 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 Remember, you have the following resources available to you: Resources Training Activity Sheet User Productivity Kit (UPK) ٠



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

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

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





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

Lesson 2: At the conclusion of this lesson, you will be able to:

Overview

• Prepare an Evaluation as a Manager





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

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

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

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Current Documents		Current Documents			Transmitter and the second sec	Create Document	3	Related Information	n
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		Luis Zamuria	MDC Arrent Devices EE	Evaluation in Program	12/01/2021	12/02/2021			
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		Senior Personnel Specialist			11/01/2020	10.10.2020	<u>'</u>		
	- 11								

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.

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Review Participant Evaluat Due Date 12192021	tions	Status Evaluation in Progress Due Date 12/10/2021	
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Consider Manager Fusion	fina	Employee ID 00209376	
Due Date 12102021		Department PD03110100 PERSONNEL MANAGEMENT - SUPPORT	
Update and Submit		Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.	
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Share with Employe			
		* Section 1 - PERFORMANCE OBJECTIVES	
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		Manager Comments H & + Fox - Sox - B I U II II A- 0-	
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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.

 Section 2 - Overall Summary 	
Manager Rating	

section.



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

6. Input Manager Comments in the Section 3 - Ways an Employee Can Improve

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

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e Review Set Evolution Due Date evineouz e Complete Manager Evaluation Due Date evintorco e Update and Submit e Pending Approval	Section 3 - Ways employee can improve Ways employee can improve Summary Manager Comments for analyse connusts tree.	
Share with Employee		

 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.

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Dixie Enriquez MDC-Annual Review EE 04/26/2021 04/25/2022 Overview	Manager Evaluation - Pending Approval	👹 Print 🖃 Notify
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Due Date sensors Update and Submit Pending Approval Share with Employee	Manager Commonts	
	Employee Comments	

- 8. Select the Save button.
- 9. Select the **Submit for Approval** button. The evaluation gets routed to the Reviewer.

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Team Performance	Performance Process	<u> ଶ ର ବ :</u>
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Select the **Confirm** button.



Lesson 2: Training Activity 1 The Instructor will now demonstrate how to execute the business process through the Demonstration INFORMS training environment. Scenario Manager prepares an evaluation for an employee. This activity is will be performed individually; you must complete it on your classroom Instructions 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 Remember, you have the following resources available to you: Resources **Training Activity Sheet** User Productivity Kit (UPK) ٠



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:

Overview

- At the conclusion of this lesson, you will be able to:
- Review an Employee's Evaluation as a Manager's Supervisor





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.



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)



- 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.

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All		
Performance (1) Performance 4 - Above Satisfactory	Route	1 row
Les Chatham 01/01/2021 To 01/01/2022	02/23	2022

3. Select the View Performance Detail link.

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Performance Summary		
Document Type MDC-Annual Review EE	Manager	Emerald Ritchie
Period Begin Date 01/01/21	Period End Date	01/01/22
Rating 4 - Above Satisfactory		View Performance Detai
Approver Comments		
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- 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.

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Approval	Manager Evaluation - Pending Approval	🕋 🔍 🗪 : 📰
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Manager Evaluation - Pending Approval		🗃 Print 🖃 Notify



- 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.

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Rating 4 - Above Satisfactory	· · · · · · · · · · · · · · · · · · ·	Vew Performance Detail
Approver Comments		

7. Select the **Submit** button.

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You are about t	to approve this request.	
Approver Con	nments	
I approve the e	evaluation for Les Chatham for this eva	aluation peric

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

	Pending Approvals	Performance
	Les Chatham	
	Accountant 2	
	Approved on 02/24	2022
1		



Lesson 3: Training Activity 1 The Instructor will now demonstrate how to execute the business process through the Demonstration INFORMS training environment. Scenario Manager's Supervisor reviews the employee's evaluation. This activity is will be performed individually; you must complete it on your classroom Instructions 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 Remember, you have the following resources available to you: Resources **Training Activity Sheet** User Productivity Kit ٠



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



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

Overview

• Share Evaluation with Employee as a Manager







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 Navigate to: Manager Self-Service tile > Team Performance Lesson 4: inferms -Share an • ñ **Evaluation with** °° îï **Employee** as Manager Lean ښ 👴 About nalytics (OBIA) * h <u>,</u> informs



1. Select Current Document and then MDC-Annual Review EE.

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Current Documents	Current Documents				Create Documen	its
Delegated Documents						
Historical Documents						1 ro
	T					1
View-Only Documents	Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date	
Create Documents by Group				01/01/2021		

2. Select Share with Employee.

Count	Perf	ormance Process			
Performance Process	MDC-Annual Review EE Manager Evaluation - Update an Les Chatham	d Share		s	hare with Employee
MDC-Annual Review EE 01/01/2021 - 01/01/2022 Overview • • • Nominate Participants Due Date 12/2020/21 • • • Review Participant Evaluations Due Date 12/2020/21	Actions - Job Title Document Type Template Status	Accountant 2 MDC-Annual Review EE Employee Performance Eval Approval - Approved	Manager Period Document ID Due Date	Emerald Ritchir 01/01/2021 - 28399 12/25/2021	e 01/01/2022
	▼ Employee Data Employee ID Department	00319256 FN06020000 ACCOUNTING SECTION			
Pending Approval Share with Employee	Expand All Collapse All View	Graphical Rating			



Lesson 4: Share an Evaluation with Employee as Manager

Lesson 4: Share an Evaluation with Employee as Manager 3. Select the **Confirm** button. This will complete the process.

	Share with Employee	×			
Select confirm to meet with the er Upon selecting of document.	Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation. Upon selecting confirm your electronic signature will be added to this document.				
Confirm	Cancel				

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 The Instructor will now demonstrate how to execute the business process through the Demonstration INFORMS training environment. Scenario Manager shares the evaluation with the employee. This activity is will be performed individually; you must complete it on your classroom Instructions 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 Remember, you have the following resources available to you: Resources **Training Activity Sheet** User Productivity Kit (UPK) ٠



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: This module includes the following lessons:

Course Summary

- 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