

Miami-Dade County



End-User Training Guide

Course Code: MSS 206

Course: Manager Self Service - Updating Team Information

Course Overview

Course Description

This course provides a comprehensive review of the Updating Team Information processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Updating Team Information
 - Discipline Management
 - Retirement and Voluntary Separation
 - Involuntary Separation
 - Requesting leave on behalf of Employee
- 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:

- Manager
- DPR
- 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
- HR 101 - Human Resources Fundamentals

Other Related Courses

Participants can attend the other related courses to Manager Self Service:

- MSS 204 - Manager Self Service – Time Management
- MSS 205 - Manager Self Service - ePerformance Management (Employee Performance Evaluation)

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 5 Hours and 30 Minutes

Table of Contents

Content	Page
Module 1: Course Introduction	4
Module 2: Updating Team Information	13
Lesson 1: Discipline Management	14
Lesson 2: Retirement and Voluntary Separation	26
Lesson 3: Involuntary Separation	40
Lesson 4: Requesting leave on behalf of Employee	48
Module 3: Course Summary	60

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:

- Record and manage disciplinary records of employees
- Record and submit retirement and resignations of employees
- Record and submit involuntary termination of employees
- Approve and employee's retirement request
- Approve and employee's resignation request
- Request a leave on behalf of Employee
- Request a return from leave on behalf of Employee

Module 1: Course Introduction

Training Audience:

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

Roles and Responsibilities

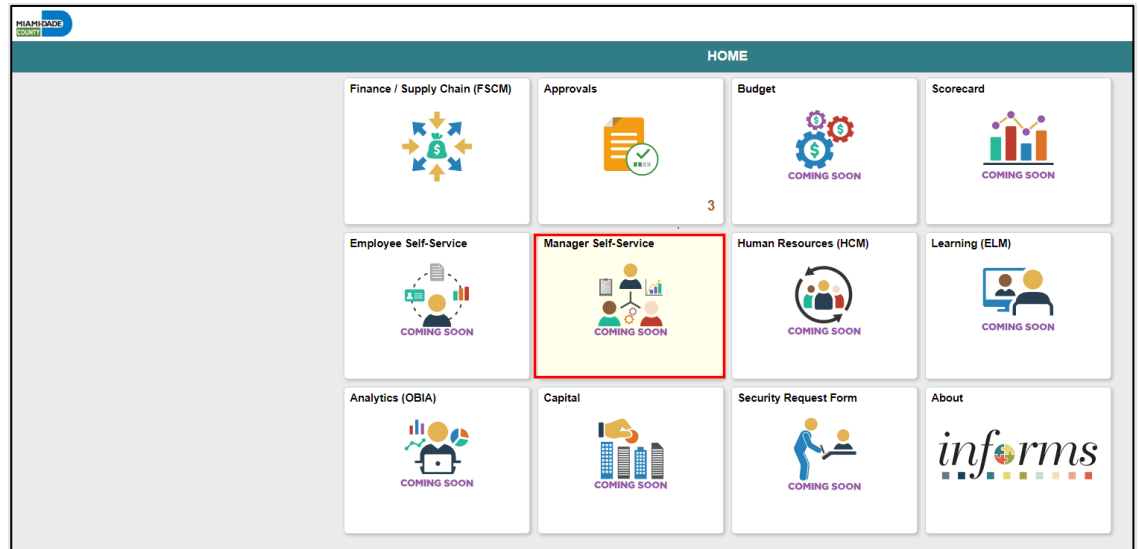
- **Manager:** The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.
- **Department Personnel Representative (DPR):** The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Module 1: Course Introduction

Navigation

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

Login to the INFORMS and select **Manager Self-Service** from the home landing page.



Module 1: Course Introduction

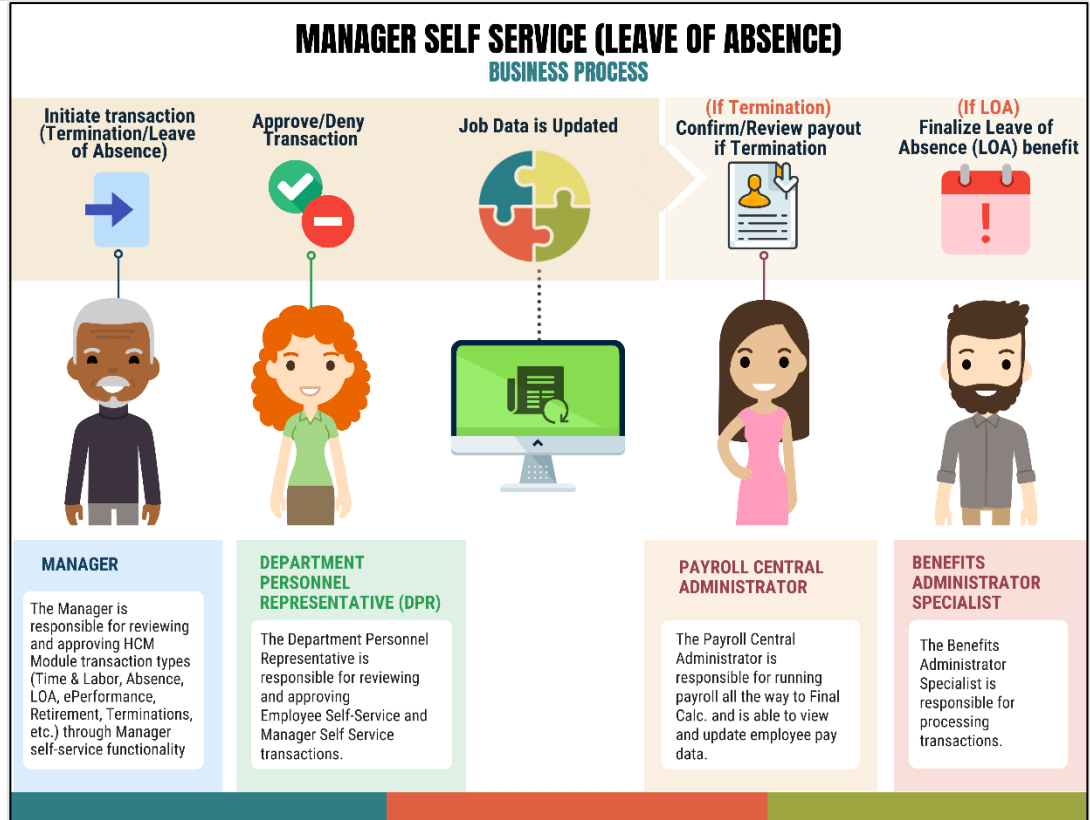
Purpose and Benefits of the Business Process

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

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Recruit to Hire to Paycheck in one system
- Enhanced Reporting
- Job Opening - Defaults from Position
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System – Leave of Absence (LOA), retirees, and benefit billing all in one system

Module 1: Course Introduction

The End-to-End Business Process



Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

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

Module 2: Updating Team Information

Lessons

This module includes the following lessons:

- Record and manage disciplinary records of employees
- Record and submit retirement and resignations of employees
- Record and submit involuntary termination of employees
- Approve and employee's retirement request
- Approve and employee's resignation request
- Request a leave on behalf of Employee
- Request a return from leave on behalf of Employee

Lesson 1: Discipline Management

Lesson 1: Overview

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

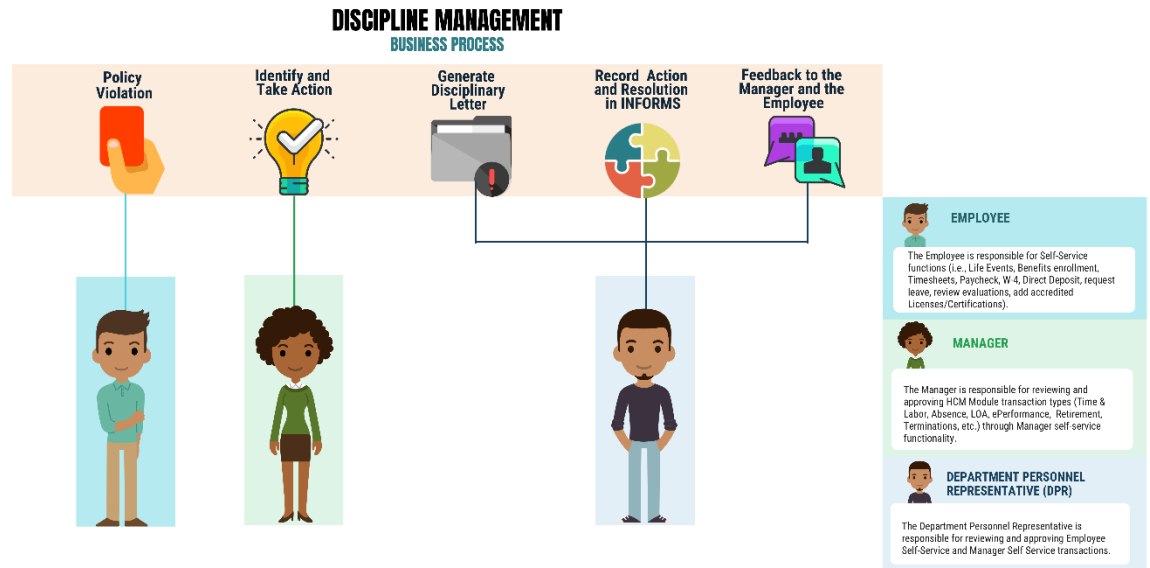
- Record employee Disciplinary Action and Action Taken Records.

Lesson 1: Discipline Management

Lesson 1: Introduction

The discipline management process is to allow the company to take disciplinary actions, corrections, and resolutions against violators of company policies. Policy violators are given disciplinary letters and their respective managers identify and act upon the corresponding disciplinary action. Alongside the manager, the Department Personnel Representative (DPR) records the disciplinary action(s) of the employee, actions taken by the manager, and disciplinary resolution to close the policy violation.

INFORMS provides the Record Administrative Actions page to enable Managers and DPRs to create and manage disciplinary records and resolutions for employees who violated policies and regulations.



Lesson 1: Discipline Management

Key Terms



The following key terms are used in this module:

Term	Definition
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
Disciplinary Action	Corrective action to reprimand the employee based on the violation.
Disciplinary Letter	A written memo addressed to the employee for the violation made.
Disciplinary Resolution	Recommended and final action that the company will take to resolve the violation made.
Violations	Policy or departmental based offenses made by the employee.

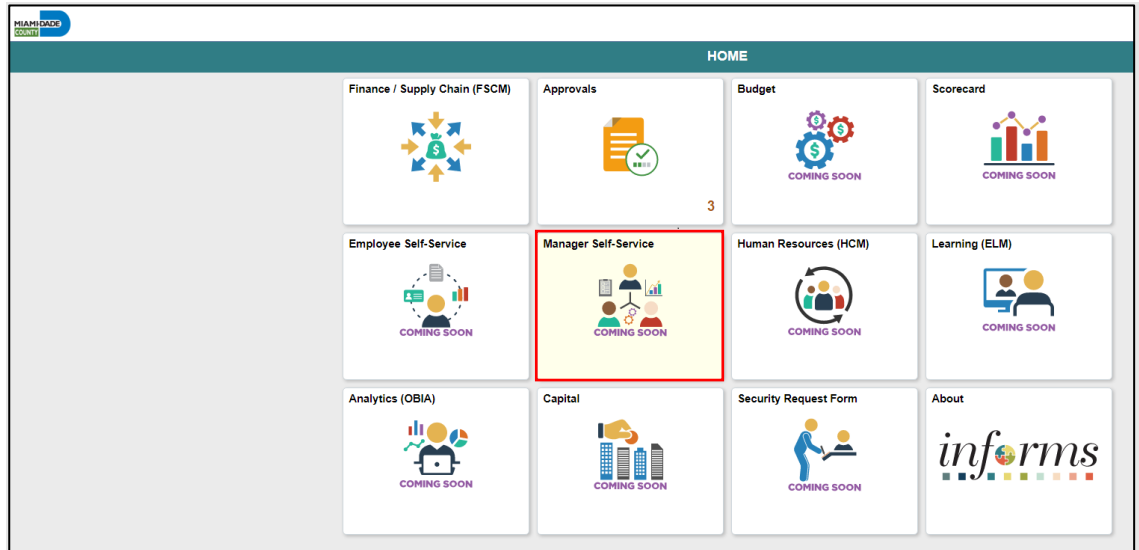
Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

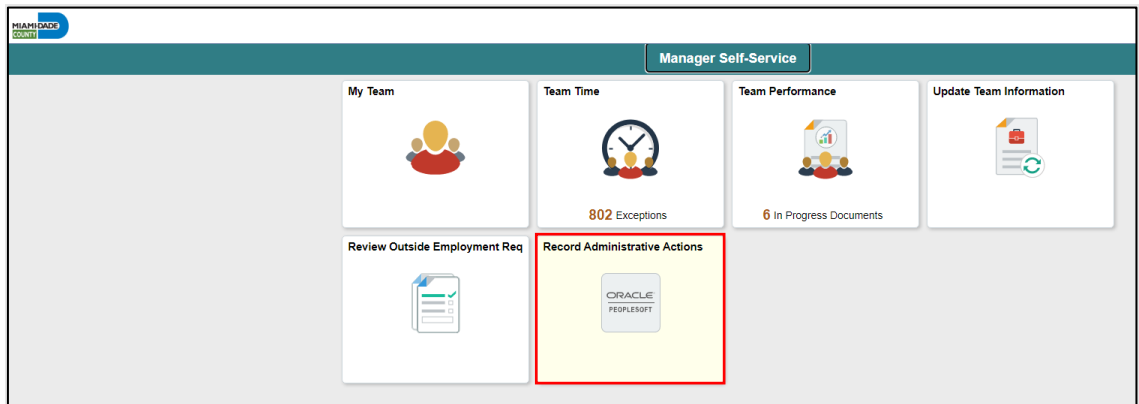
Record a Disciplinary Action and Action Taken

As a Manager, create a disciplinary action and disciplinary action taken record in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Record Administrative Actions**.



Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

3. Populate the **Search Criteria** as needed, and then select **Search**.

MIAMI-DADE COUNTY
Manager Self-Service Record Administrative Actions

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

Find an Existing Value

Search Criteria

Empl ID begins with

First Name begins with

Last Name begins with

Payroll Status =

Employee Classification begins with

Employee Type =

Business Unit begins with

Supervisor ID begins with

Job Title begins with

Case Sensitive

Search **Clear** Basic Search Save Search Criteria

4. Scroll down, and then select an employee who violated a policy or regulation.

MIAMI-DADE COUNTY
Manager Self-Service Record Administrative Actions

Case Sensitive

Search **Clear** Basic Search Save Search Criteria

Search Results

View All 1-10 of 10

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Job Title
00029548	Luz	Gutierrez	Active	AA	Hourly	Library As
00119754	Rommie	Brown III	Active	AE	Hourly	Library Pa
00184738	Norma	Salinas	Active	AA	Hourly	Library As
00185796	Jocelyne	Vieux	Active	AA	Hourly	Library As
00209602	Unita	Gustave	Active	AA	Hourly	Library As
00313118	Rachel	Boucher-Johnson	Active	AE	Hourly	Library Pa
00313119	Ricardo	Yuhico	Active	AA	Hourly	Library As
00315910	Madelin	Garcia	Active	AA	Hourly	Library As
00319413	Malihah	Osanloo	Active	AA	Hourly	Library As

Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

5. Make sure to provide the mandatory and other relevant fields in the **Disciplinary Action** tab. In this example:
 - **Type:** Search and select **Disciplinary Type** from the **Look Up** pop-up window.
 - **Incident Date:** Select the month, day, and year from the calendar icon when the violation occurred.
 - **Disciplinary Date:** Select the month, day, and year from the calendar icon when the disciplinary action will be imposed.
 - **Violations:** Search and select **Violations** from the **Look Up** pop-up window. **Note:** The description is auto-populated based on the selection.
 - **Discipline Offenses:** Search and select **Disciplinary Offense** from the **Look Up** pop-up window. **Note:** The description is auto-populated based on the selection.

MIAMI-DADE COUNTY
Record Administrative Actions

Disciplinary Action
Action Taken
Disciplinary Resolution

Norma Salinas Person ID 00184739

Total Incident 1

*Type DAR
Disciplinary Action Report
 Confidential

*Incident Date 01/14/2022

Cost

Entered By 00038584

Supervisor ID 00038584

Initiating Supervisor

*Disciplinary Date 01/14/2022

DAR Number

Disciplinary Status Active

Sheerly Moya

Sheerly Moya

Violations

Violations	Description	View Description
1	B Offensive Conduct.	View Description

Discipline Offenses

Disciplinary Offense	Description
1	

Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

- **Facts:** Provide the facts related to the **Discipline Offense**.
Note: The description is auto-populated based on the selection.
- **Administrative/Implementing Orders:** Search and select **Administrative/Implementing Orders** from the **Look Up** pop-up window.
Note: The description is auto-populated based on the selection.

Record Administrative Actions

Discipline Offenses

Disciplinary Offense	Description		
1 DAR	Refusal drug/alcohol test	+	-

Facts

Administrative/Implementing Orders

Administrative Orders	Description		
1 7-36	Workplace Violence	+	-

[View Administrative Orders](#)

Departmental Standard Operational Procedures

Dept Standard Operational Proc	Effective Date	Description		
1			+	-

Miscellaneous Departmental Violations

Miscellaneous Dept Violations	Description	View Description		
1		View Description	+	-

- Scroll down, and then select the **Action Taken** hyperlink.
Note: An **Action Taken** record is required to save a **Disciplinary Action** record.

Attachments

Attachments:

GetMessageText: No default message. (25010,13)

[Add Attachment](#)

[Print DAR](#) [Print Notes](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Disciplinary Action | [Action Taken](#) | [Disciplinary Resolution](#)

Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

6. Make sure to provide the mandatory and other relevant fields in the **Action Taken** tab. In this example:
 - **Disciplinary Step:** Type the **Disciplinary Step**, or search and select it from the **Look Up** pop-up window.
 - **Action Date:** Type the date, or select the month, day, and year from the calendar icon when the disciplinary action is conducted.
 - **Discussed With:** Type the **Empl ID** of the manager whom the employee discussed with regarding the disciplinary action, or search and select it from the **Look Up** pop-up window.
 7. Select **Save** to create the disciplinary record.
- Note:** A DAR number is created and a notification is sent to the DPR.

MIAMI-DADE COUNTY

Manager Self-Service Record Administrative Actions

Disciplinary Action **Action Taken** Disciplinary Resolution

Norma Salinas Person ID 00184739

Total Incident 1

Disciplinary Information 1 of 1 | View All

Disciplinary Type	DAR	Disciplinary Action Report
Incident Date	01/14/2022	DAR Number

Action Taken 1 of 1 | View All

*Disciplinary Step: PND Pending

*Action Date: 01/14/2022

Discussed With: 00000022 David Connolly

Comment:

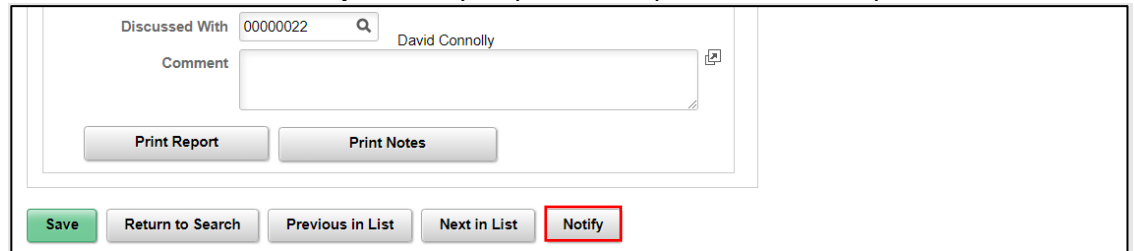
Print Report **Print Notes**

Save **Return to Search** **Previous in List** **Next in List** **Notify**

Lesson 1: Discipline Management

Lecture 1: Record a Disciplinary Action and Action Taken

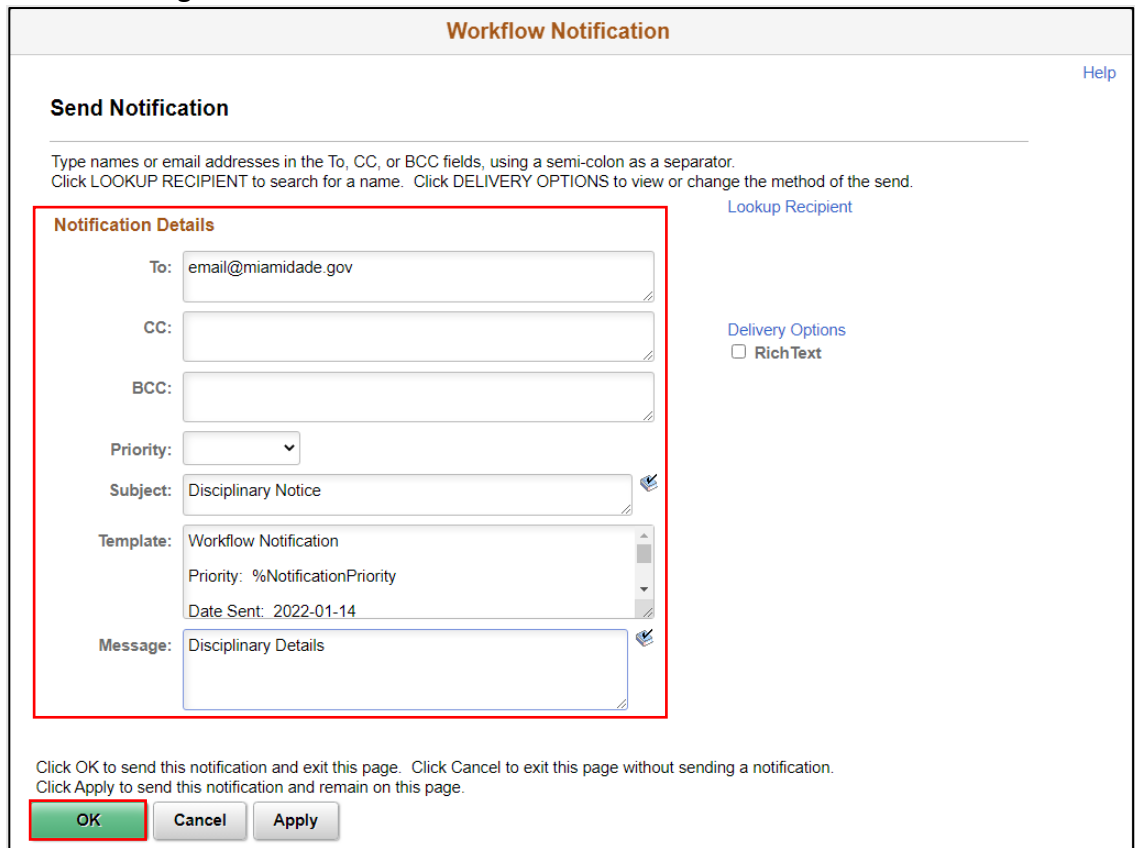
8. If needed, select **Notify** to notify a specific recipient within a department.



The screenshot shows a form with the following elements:

- Discussed With: 00000022 (with a search icon) and David Connolly
- Comment: A large text area with a copy icon.
- Buttons: Print Report, Print Notes, Save, Return to Search, Previous in List, Next in List, and Notify (highlighted in red).

- To send Ad Hoc notifications, populate the **Notification Details** and then select **Ok** to go back to the Action Taken tab.



The screenshot shows the 'Workflow Notification' form with the following elements:

- Header: Workflow Notification (with a Help link)
- Section: Send Notification
- Instructions: Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.
- Notification Details (highlighted in red):
 - To: email@miamidade.gov
 - CC:
 - BCC:
 - Priority: (dropdown menu)
 - Subject: Disciplinary Notice
 - Template: Workflow Notification
 - Priority: %NotificationPriority
 - Date Sent: 2022-01-14
 - Message: Disciplinary Details
- Delivery Options: RichText
- Buttons: OK (highlighted in red), Cancel, Apply

Lesson 1: Training Activity 1

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

Scenario A Manager updates an employee record using the Manager Self Service tile.

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

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

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

Lesson 1: Training Exercise

Debrief



1. A Disciplinary Action record can only be saved after providing information on the Action Taken tab.
 - a) True
 - b) False
2. The Add Row icon must be selected to create a Disciplinary Resolution record for an existing Disciplinary Action and Action Taken record.
 - a) True
 - b) False

Lesson 1: Lesson Summary

Objectives Achieved



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

- Record employee Disciplinary Action and Action Taken Records.

Lesson 2: Retirement and Voluntary Separation

Lesson 2: Overview

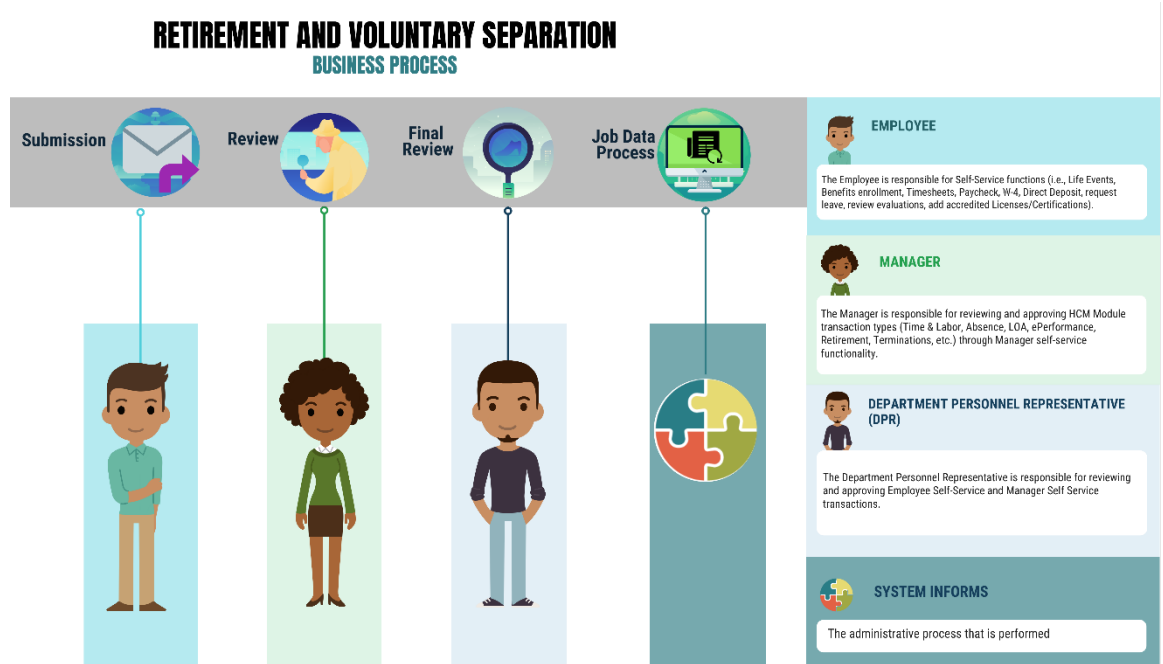
At the conclusion of this lesson, you will be able to:

- Submit a retirement request of behalf of the employee
- Submit a resignation request on behalf of the employee
- Approve and employee's retirement request
- Approve and employee's resignation request

Lesson 2: Retirement and Voluntary Separation

Lesson 2: Introduction

The retirement and voluntary separation process enables the employees to retire or resign from the county on their own volition. The Manager receives the requests which are then reviewed and approved. Once the requests are approved, it is then routed to the DPR for final approval. The DPR approves the retirement or voluntary separation submitted by the employee.



Lesson 2: Retirement and Voluntary Separation

Key Terms



The following key terms are used in this module:

Term	Definition
Retirement	The employee's decision to permanently leave the County.
Voluntary Separation	The employee's decision to resign from the County.

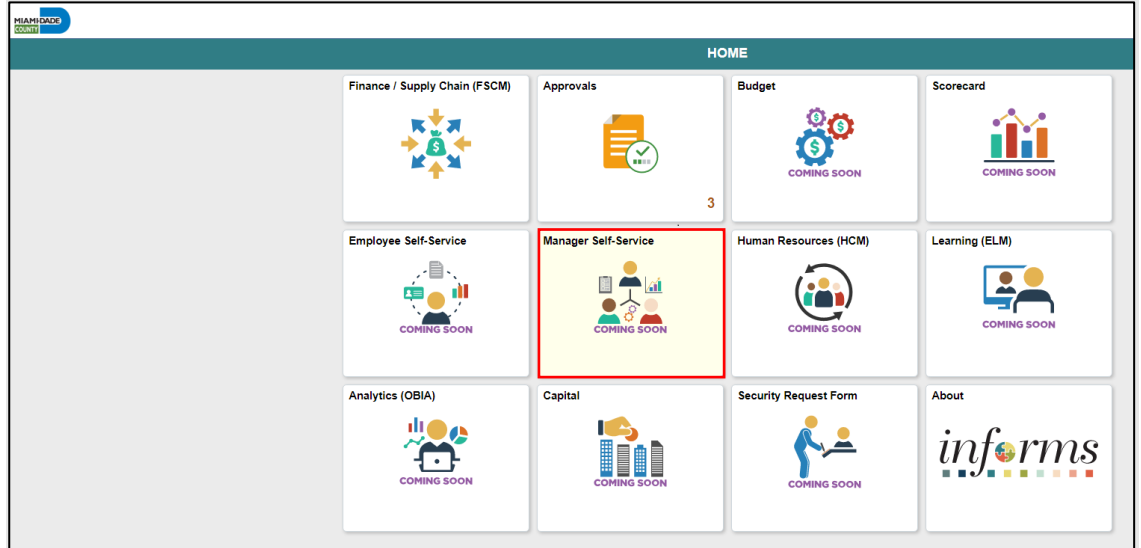
Lesson 2: Retirement and Voluntary Separation

Lecture 1: File a Retirement on behalf of Employee

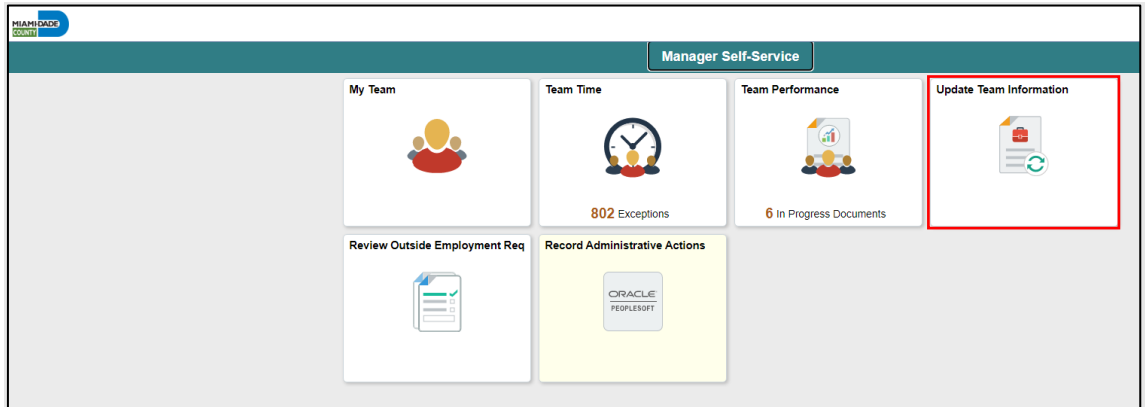
File a Retirement on behalf of Employee

As a Manager, file for retirement in INFORMS.

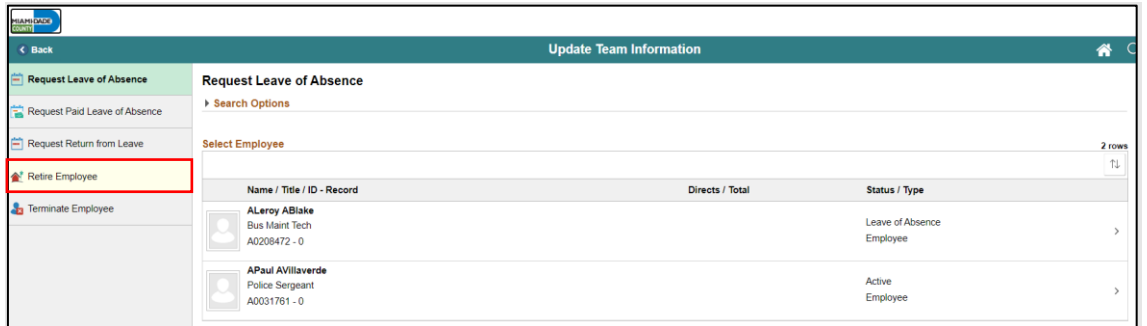
1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Update Team Information**.



3. Select **Retire Employee**.



Lesson 2: Retirement and Voluntary Separation

Lecture 1: File a Retirement on behalf of Employee

4. Select an employee to retire.

The screenshot shows the 'Retire Employee' interface. On the left is a navigation menu with options: Request Leave of Absence, Request Paid Leave of Absence, Request Return from Leave, Retire Employee (highlighted), and Terminate Employee. The main area is titled 'Retire Employee' and includes a search bar and a table of employees. The table has columns for Name / Title / ID - Record, Directs / Total, and Status / Type. Two employees are listed: ALeroy ABlake (Bus Maint Tech, A0208472 - 0) and APaul AVillaverde (Police Sergeant, A0031761 - 0). The second row is highlighted with a red border, and a 'Select Employee' button is visible next to it.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

5. Confirm that the Reason is Retirement, and then select Next.

The screenshot shows the 'Retire Employee' 'Job Detail' screen for APaul AVillaverde. A progress bar at the top shows '1 Job Detail' and '2 Review & Submit'. A 'Next >' button is highlighted with a red box. The 'Work and Job Information' section includes a 'Transaction Date' of 01/13/2022 and a 'Reason' dropdown menu set to 'Retirement', which is also highlighted with a red box. Below this is the 'Current Information' section with the following details:

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

6. Provide Comments as needed, and then select Submit.

The screenshot shows the 'Retire Employee' 'Review and Submit' screen for APaul AVillaverde. A progress bar at the top shows '1 Job Detail' and '2 Review & Submit'. A 'Submit' button is highlighted with a red box. The 'Review and Submit' section displays the same information as the previous screen, including the 'Reason' of Retirement. Below this is a 'Comments' section with a large empty text area outlined in red.

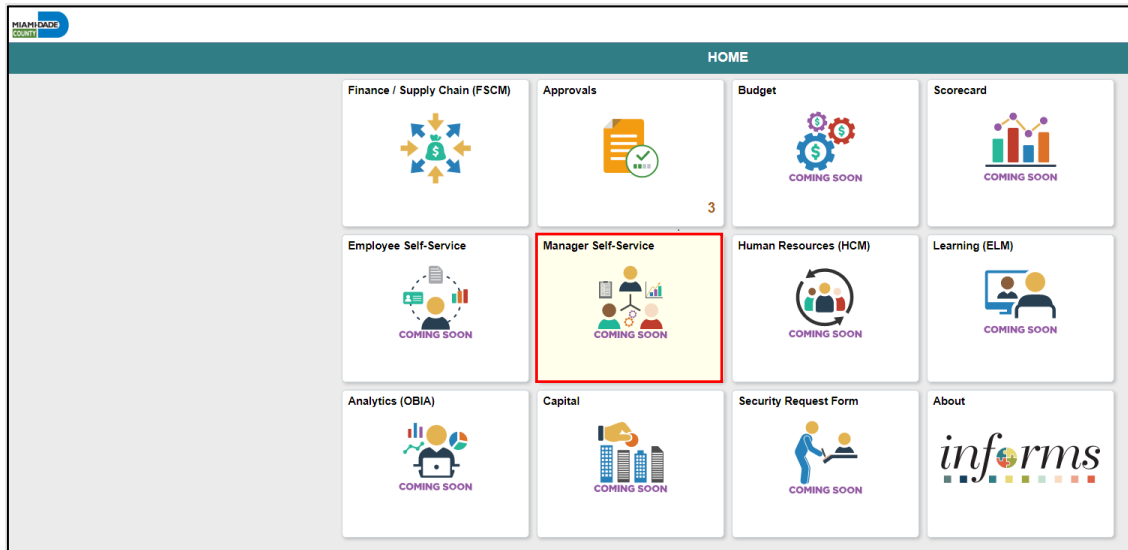
Lesson 2: Retirement and Voluntary Separation

Lecture 2: File a Resignation on behalf of Employee

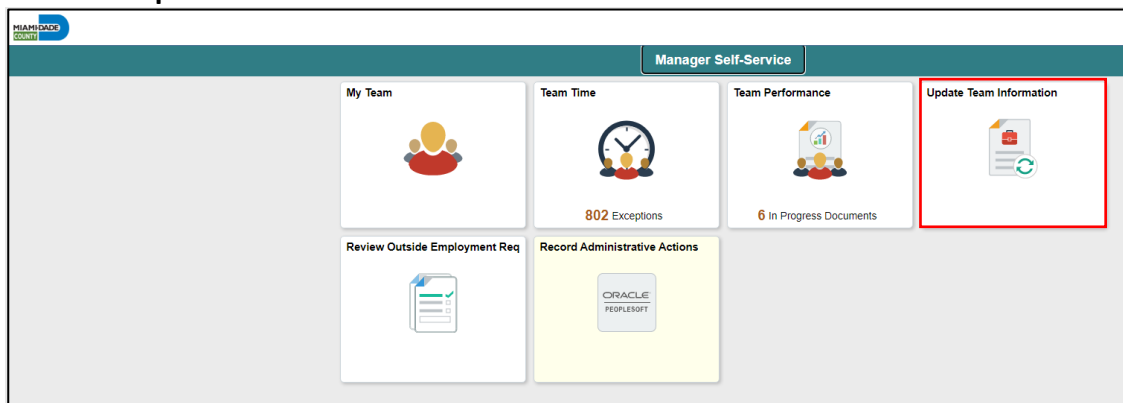
File a Resignation on behalf of Employee

As a Manager, file for resignation in INFORMS.

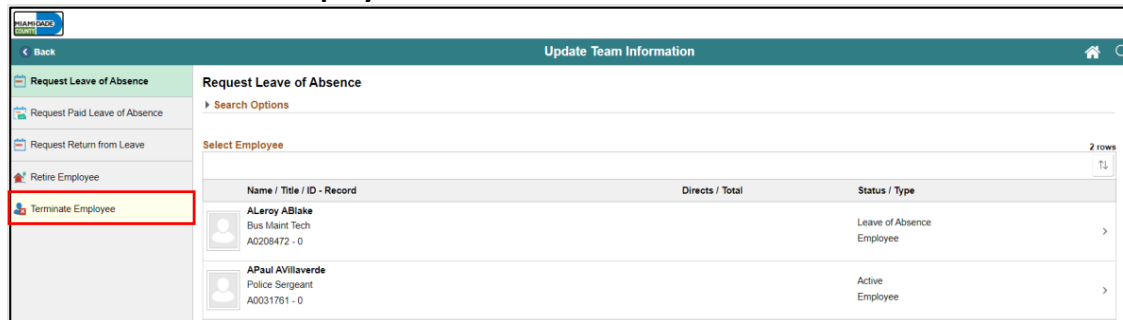
1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Update Team Information**.



3. Select **Terminate Employee**.



Lesson 2: Retirement and Voluntary Separation

Lecture 2: File a Resignation on behalf of Employee

4. Select an employee to resign.

The screenshot shows the 'Terminate Employee' interface. On the left is a sidebar with navigation options: Request Leave of Absence, Request Paid Leave of Absence, Request Return from Leave, Retire Employee, and Terminate Employee (highlighted). The main area is titled 'Update Team Information' and 'Terminate Employee'. It includes a search bar and a table with 2 rows. The second row, for 'APaul AVillaverde' (Police Sergeant, ID A0031761-0), is highlighted with a red border. A 'Select Employee' button is located below the table.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

5. Confirm that the Reason is Voluntary Resignation, and then select Next.

The screenshot shows the 'Job Detail' step of the 'Terminate Employee' process for 'APaul AVillaverde'. A progress bar at the top indicates 'Job Detail' (1) and 'Review & Submit' (2). The 'Reason' dropdown menu is set to 'Voluntary Resignation' and is highlighted with a red box. A 'Next' button is located in the top right corner. Below the dropdown is the 'Current Information' section.

Work and Job Information

*Transaction Date: 01/13/2022

*Reason: Voluntary Resignation

Current Information

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

6. Provide Comments as needed, and then select Submit.

The screenshot shows the 'Review and Submit' step of the 'Terminate Employee' process. The progress bar at the top indicates 'Job Detail' (1) and 'Review & Submit' (2). The 'Reason' is confirmed as 'Voluntary Resignation'. Below the 'Current Information' section is a 'Comments' field, which is highlighted with a red box. A 'Submit' button is located in the top right corner.

Review and Submit

Transaction Date: 01/13/2022

Reason: Voluntary Resignation

Current Information

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

Comments

Lesson 2: Retirement and Voluntary Separation

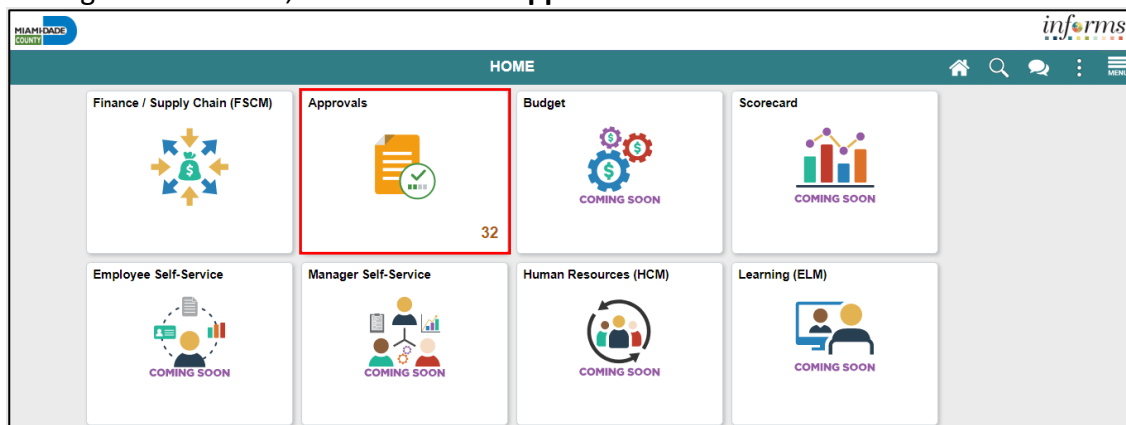
Lecture 3: Approve Employee Retirement

This lesson will review Retirement and Voluntary Termination Approvals.

Approve Employee Retirement

As a Manager, approve the employee's retirement record in INFORMS.

1. Login to INFORMS, and then select **Approvals**.



2. Select **Retire Employee**.

View By	Type			
All	270			
Address Change	3			
Create Position	12			
DPR Salary Change	92			
Forms	46			
Job Opening	1			
Manage Position	9			
Payable Time	100			
Reported Time	1			
Request Leave of Absence	2			
Retire Employee	2			
Terminate Employee	2			

Payable Time	Quantity for Approval	Start Date	End Date	Status
APaul AVillaverde	Quantity for Approval -16 Hours	03/09/2020	03/16/2020	Routed 08/04/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020
	Quantity for Approval 0 Hours	-	-	Routed 09/03/2020

3. Select an employee to retire from the **Retire Employee** page.

Retire Employee	Reason	Status
Retire Employee Dwight Wilson Jr	Reason - Retirement	Routed 03/16/2021
Retire Employee Esther Reyes	Reason - Retirement	Routed 09/21/2021

Lesson 2: Retirement and Voluntary Separation

Lecture 3: Approve Employee Retirement

4. Provide the **Approver Comments**, and then select **Approve**.

Pending Approvals Retire Employee

Dwight Wilson Jr
Hr Services Clerk

Approve **Deny**

Summary

Transaction Date 03/16/21 Reason Retirement
Requester Tommy Salleh

Unchanged Job Information

Position Number HR SERVICES CLERK - 00003229
Job Title Hr Services Clerk - 000451
Reports To Manager MARINA MANAGER 3 - 00011594

Requester Comments

None

Approver Comments
Retire employee

Approval Chain >

5. Select **Submit**.

Note: Approver Comments can be changed as needed.

Cancel **Approve** **Submit**

You are about to approve this request.

Approver Comments
Retire employee

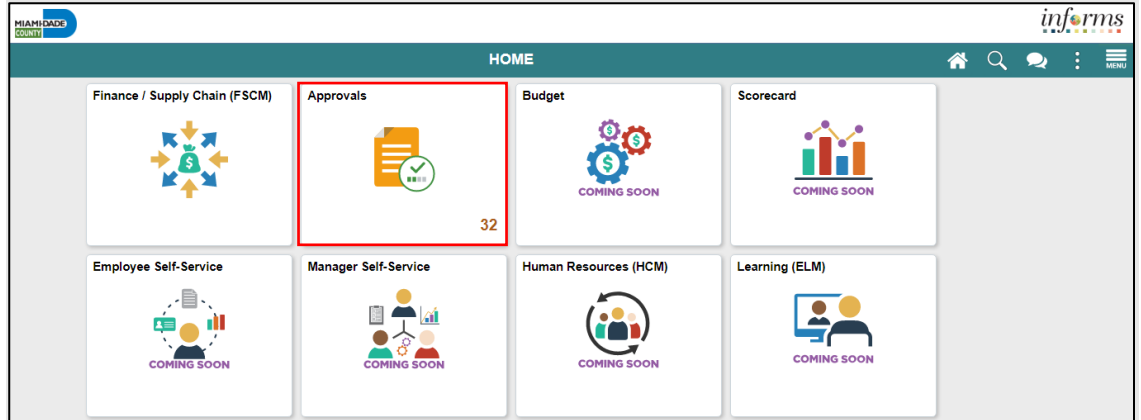
Lesson 2: Retirement and Voluntary Separation

Approve Employee Voluntary Separation

Lecture 4:
Approve
Employee
Voluntary
Separation

As a Manager, approve the employee's resignation record in INFORMS.

1. Login to INFORMS, and then select **Approvals**.



2. Select **Terminate Employee**.

View By		Type			
All	270				
Address Change	3				
Create Position	12				
DPR Salary Change	92				
Forms	46				
Job Opening	1				
Manage Position	9				
Payable Time	100				
Reported Time	1				
Request Leave of Absence	2				
Retire Employee	2				
Terminate Employee	2				

Pending Approvals				
All 270 rows				
Payable Time	APaul AVillaverde	Quantity for Approval -16 Hours	03/09/2020 - 03/16/2020	Routed 08/04/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020
Payable Time		Quantity for Approval 0 Hours	-	Routed 09/03/2020

3. Select an employee to resign from the **Terminate Employee** page.

View By		Type			
All	270				
Address Change	3				
Create Position	12				
DPR Salary Change	91				
Forms	46				

Pending Approvals				
Terminate Employee 2 rows				
Terminate Employee	Ricardo Diaz	Reason - End of Assignment		Routed 10/30/2020
Terminate Employee	Happy Halleburton	Reason - Voluntary Resignation	Attachments 1	Routed 03/17/2021

Lesson 2: Retirement and Voluntary Separation

Lecture 4: Approve Employee Voluntary Separation

4. Provide the **Approver Comments**, and then select **Approve**.

The screenshot shows a web interface for terminating an employee. At the top, it says 'Pending Approvals' and 'Terminate Employee'. The employee's name is 'Happy Halleburton' and his title is 'Office Support Specialist 1'. There are 'Approve' and 'Deny' buttons at the top right. The 'Approve' button is highlighted with a red box. Below this, there is a 'Summary' section with fields for 'Transaction Date' (01/29/21), 'Reason' (Voluntary Resignation), and 'Requester' (Ernie Els). A section titled 'Unchanged Job Information' lists 'Position Number', 'Job Title', and 'Reports To Manager'. Below that is an 'Attachments' section with a dropdown arrow. The 'Requester Comments' section contains the text 'test'. The 'Approver Comments' section has a text input field containing 'Voluntary resignation', which is also highlighted with a red box. At the bottom, there is an 'Approval Chain' section with a dropdown arrow.

5. Select **Submit**.
Note: Approver Comments can be changed as needed.

The screenshot shows a confirmation dialog box titled 'Approve'. It has 'Cancel' and 'Submit' buttons at the top, with the 'Submit' button highlighted in green. The main text reads 'You are about to approve this request.' Below this is a section titled 'Approver Comments' with a text input field containing 'Voluntary resignation'.

Lesson 2: Training Activity 1

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

Scenario As a Manager approves a Retirement and a Termination using the Approvals tile.

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. A Manager can submit a Resignation Request on behalf of an employee.
 - a) True
 - b) False
2. The Manager provides the first approval in a Resignation or Retirement request.
 - a) True
 - b) False

Lesson 2: Lesson Summary

Objectives Achieved



Now that you have completed the Retirement and Voluntary Separation lesson, you should be able to:

- Submit a retirement request of behalf of the employee
- Submit a resignation request on behalf of the employee
- Approve and employee's retirement request
- Approve and employee's resignation request

Lesson 3: Involuntary Separation

Lesson 3: Overview

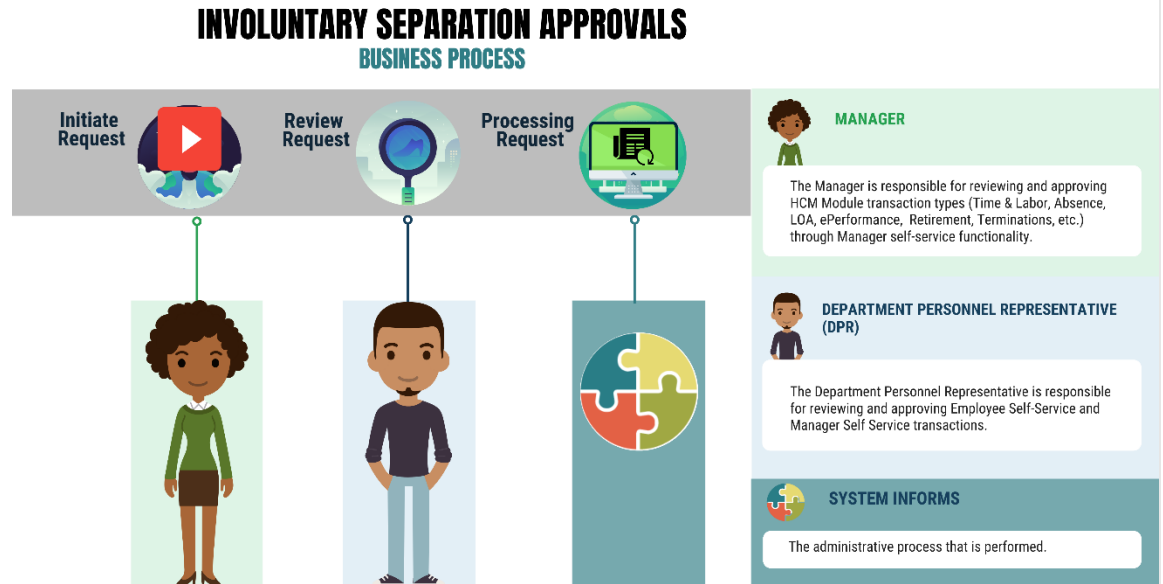
At the conclusion of this lesson, you will be able to:

- Submit a record for an employee's involuntary separation

Lesson 3: Involuntary Separation

Lesson 3: Introduction

INFORMS provides the Update Team Information page to enable Managers and DPRs to submit an involuntary separation of an employee.



Lesson 3: Involuntary Separation

Key Terms



The following key terms are used in this module:

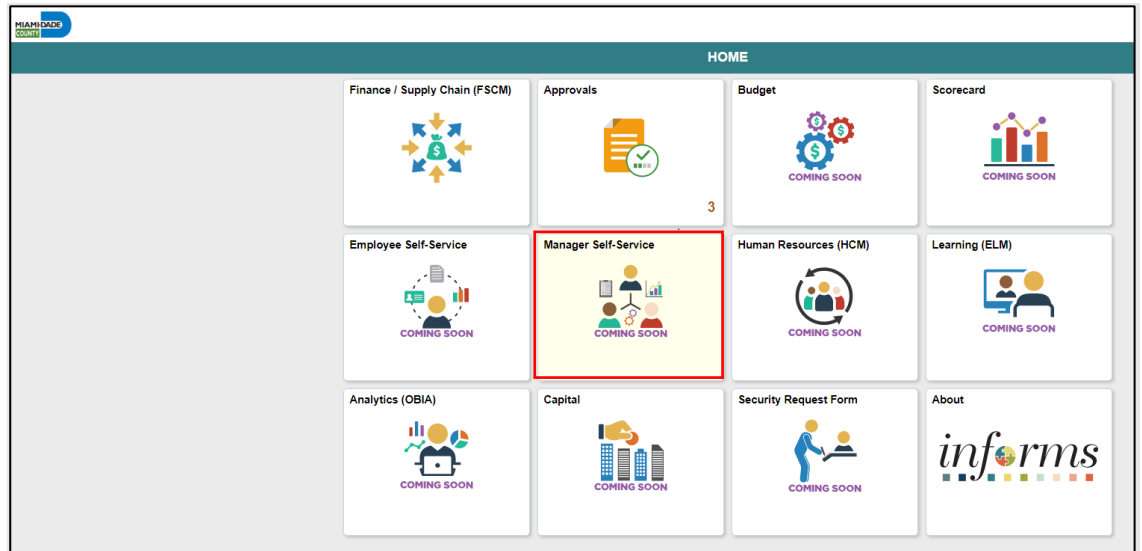
Term	Definition
Involuntary Separation	Occurs when the department chooses to separate employees through reduction in force or by termination for conduct reasons.

Lesson 3: Involuntary Separation

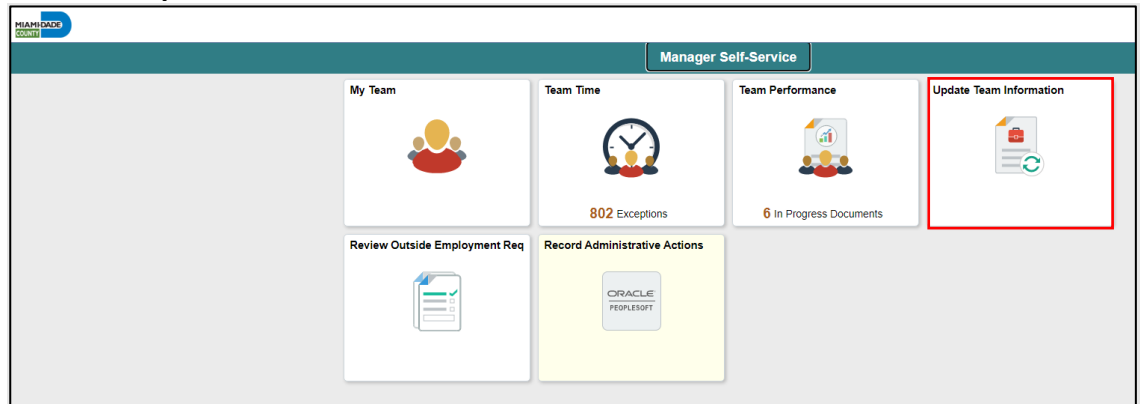
Lecture 1: Involuntary Separation

As a Manager, file an involuntary separation for an employee in INFORMS.

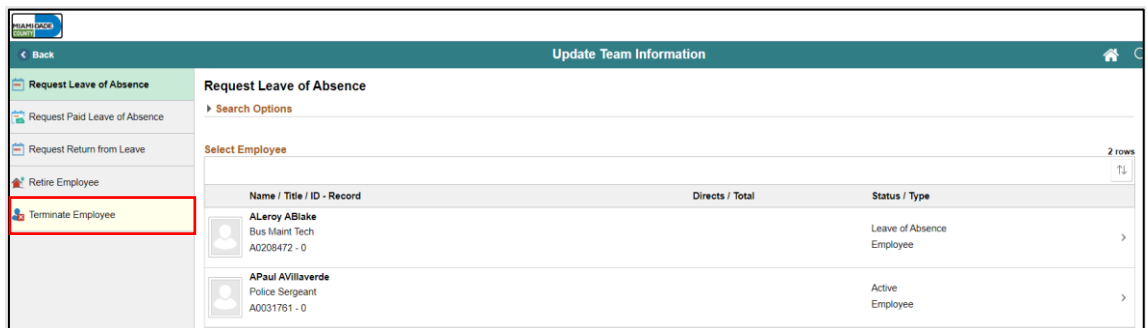
1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Update Team Information**.



3. Select **Terminate Employee**.



Lesson 3: Involuntary Separation

Lecture 1: Involuntary Separation

4. Select an employee to terminate.

The screenshot shows the 'Terminate Employee' interface. On the left is a sidebar with navigation options: Request Leave of Absence, Request Paid Leave of Absence, Request Return from Leave, Retire Employee, and Terminate Employee (which is selected). The main area is titled 'Update Team Information' and 'Terminate Employee'. It includes a 'Search Options' section and a 'Select Employee' section with a table of 2 rows. The second row, for 'APaul AVillaverde' (Police Sergeant, ID A0031761 - 0), is highlighted with a red border. A 'Select Employee' button is located below the highlighted row.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

5. Select **Involuntary Separation** as the Reason, and then select **Next**.

The screenshot shows the 'Terminate Employee' screen at the 'Job Detail' step (indicated by a green circle with '1'). The employee 'APaul AVillaverde' (Police Sergeant) is shown. A progress bar indicates the next step is 'Review & Submit' (indicated by a green circle with '2'). A 'Next >' button is highlighted with a red box. The 'Work and Job Information' section includes a 'Transaction Date' field set to 01/13/2022 and a 'Reason' dropdown menu set to 'Involuntary Separation', which is highlighted with a red box. Below this is the 'Current Information' section with fields for Position Title, Job Title, Reports To, and Manager Name.

Work and Job Information

Transaction Date: 01/13/2022

Reason: Involuntary Separation

Current Information

Position Title: Police Sergeant A0008083

Job Title: Police Sergeant 004202

Reports To: Correctional Sergeant A0002309

Manager Name: ADeandre ADaniels

6. Provide **Comments** as needed, and then select **Submit**.

The screenshot shows the 'Terminate Employee' screen at the 'Review & Submit' step (indicated by a green circle with '2'). The employee 'APaul AVillaverde' (Police Sergeant) is shown. A progress bar indicates the previous step was 'Job Detail' (indicated by a blue circle with '1'). A 'Submit' button is highlighted with a red box. The 'Review and Submit' section displays the same information as the previous screen. Below this is a 'Comments' section with a large red-bordered text input field.

Review and Submit

Transaction Date: 01/13/2022

Reason: Involuntary Separation

Current Information

Position Title: Police Sergeant A0008083

Job Title: Police Sergeant 004202

Reports To: Correctional Sergeant A0002309

Manager Name: ADeandre ADaniels

Comments

Lesson 3: Training Activity 1

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

Scenario As a Manager approves an Involuntary Separation using the Approvals tile.

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

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

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

Lesson 3: Training Exercise

Debrief



1. An employee can be involuntarily terminated for misconduct reasons.
 - a) True
 - b) False
1. Managers can submit involuntary separation requests.
 - a) True
 - b) False

Lesson 3: Lesson Summary

Objectives Achieved



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

- Submit a record for an employee's involuntary separation

Lesson 4: Requesting leave on behalf of Employee

Lesson 4: Overview

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

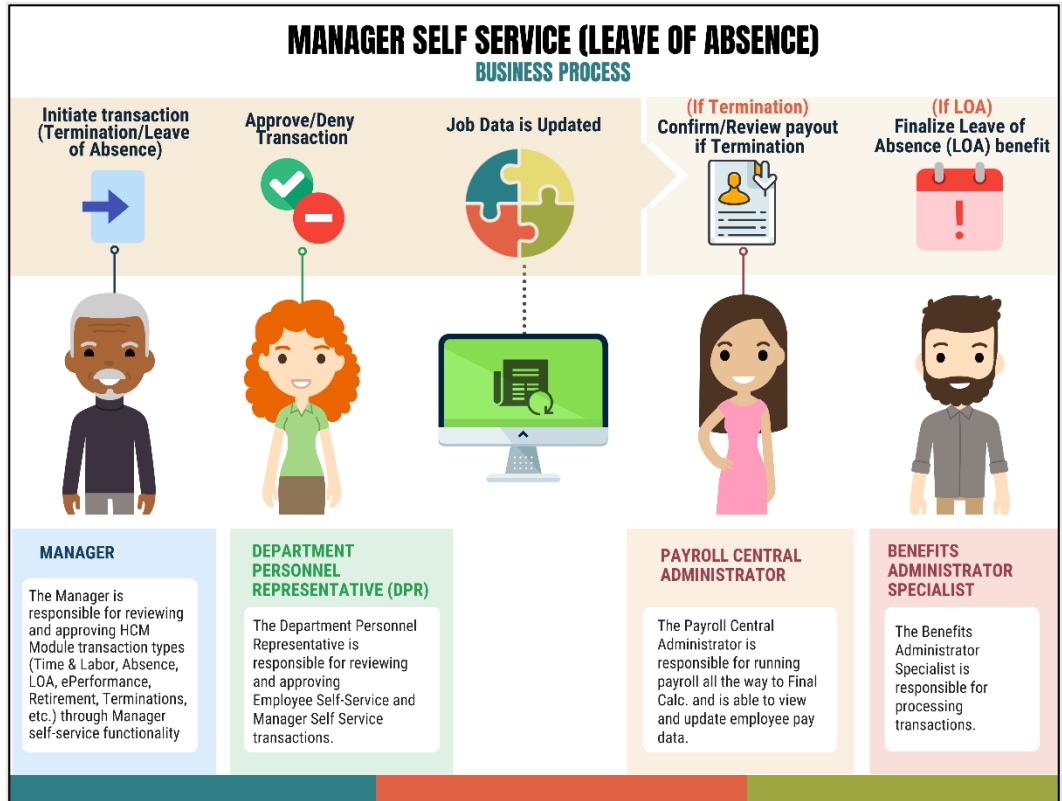
- Submit a record for an employee's leave of absence
- Submit a record for an employee's return from leave

Lesson 4: Requesting leave on behalf of Employee

Lesson 4: Introduction

Leave of Absence

INFORMS provides the Update Team Information page to enable Manager's to request a leave of absence on behalf of an employee.

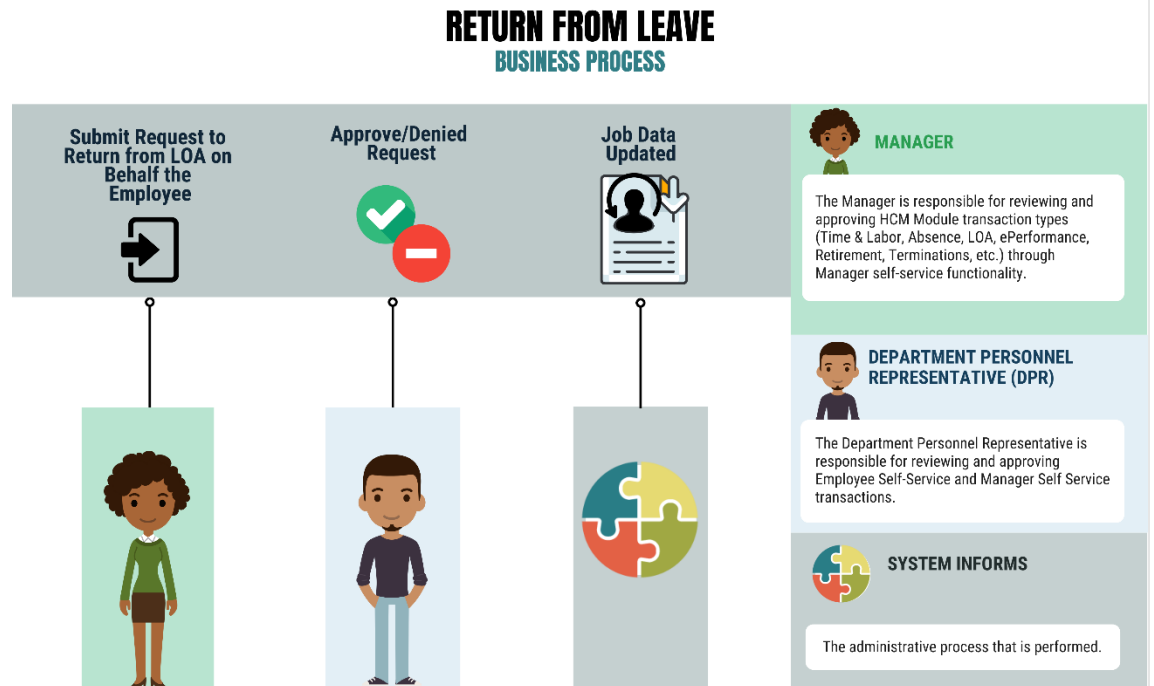


Lesson 4: Requesting leave on behalf of Employee

Lesson 4: Introduction

Return from Leave

The Manager submits the request to return from LOA on behalf the employee, it routes to the DPR, and once is approved, the Job Data is updated in INFORMS.



Lesson 4: Requesting leave on behalf of Employee

Key Terms



The following key terms are used in this module:

Term	Definition
LOA	Leave of Absence is a request for an employee to be absent from work for a period of time.

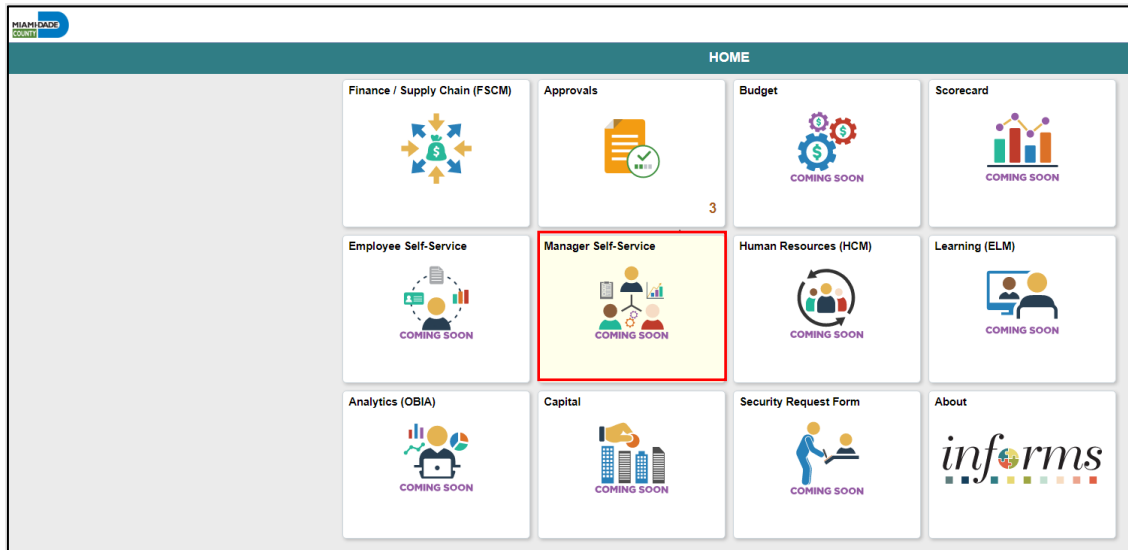
Lesson 4: Requesting leave on behalf of Employee

Lecture 1: File a Leave of Absence

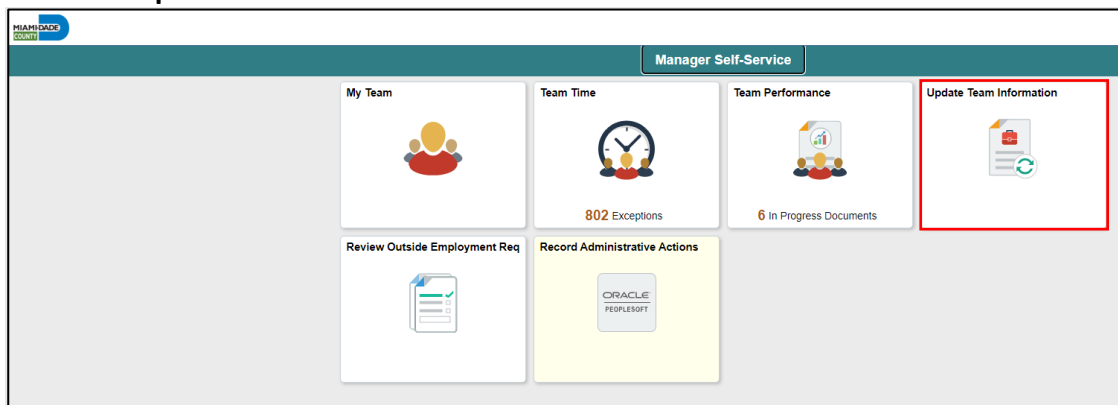
File a Leave of Absence

As a Manager, file for a leave of absence on behalf of an employee in INFORMS.

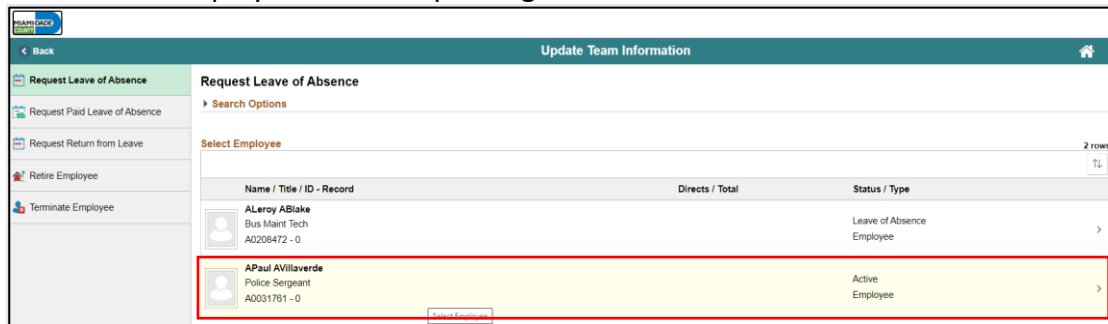
1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Update Team Information**.



3. Select an employee who is requesting a leave of absence.



Lesson 4: Requesting leave on behalf of Employee

Lecture 1: File a Leave of Absence

4. Confirm that the Reason is PERSONAL - LOA.

Request Leave of Absence

APaul AVillaverde
Police Sergeant

Transaction Date: 01/13/2022

Reason: PERSONAL - LOA

Business Unit: Police PD

Department: HOMICIDE - LAW ENF PD04080100

Expected Return Date: [Calendar Icon]

5. Type the date, or select the month, day, and year from the calendar icon when the employee is expected to return, and then select **Next**.

Request Leave of Absence

APaul AVillaverde
Police Sergeant

Transaction Date: 01/13/2022

Reason: PERSONAL - LOA

Business Unit: Police PD

Department: HOMICIDE - LAW ENF PD04080100

Expected Return Date: 01/31/2022

6. Provide **Comments** as needed, and then select **Submit**.

Request Leave of Absence

APaul AVillaverde
Police Sergeant

Transaction Date: 01/13/2022

Reason: PERSONAL - LOA

Business Unit: Police PD

Department: HOMICIDE - LAW ENF PD04080100

Expected Return Date: 01/31/2022

Comments: [Empty Text Area]

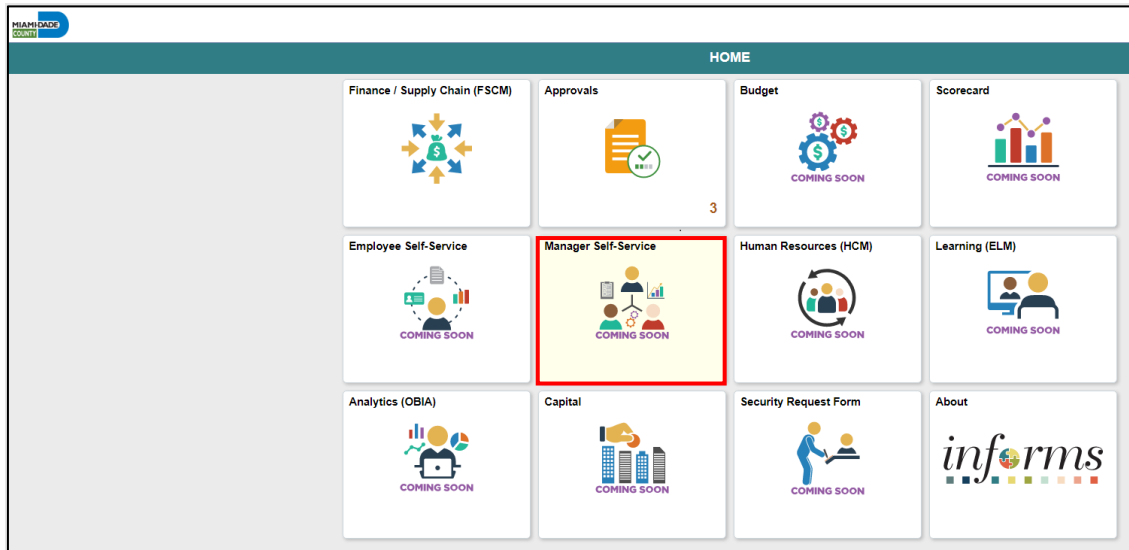
Lesson 4: Requesting leave on behalf of Employee

Lecture 2: File a Return from Leave

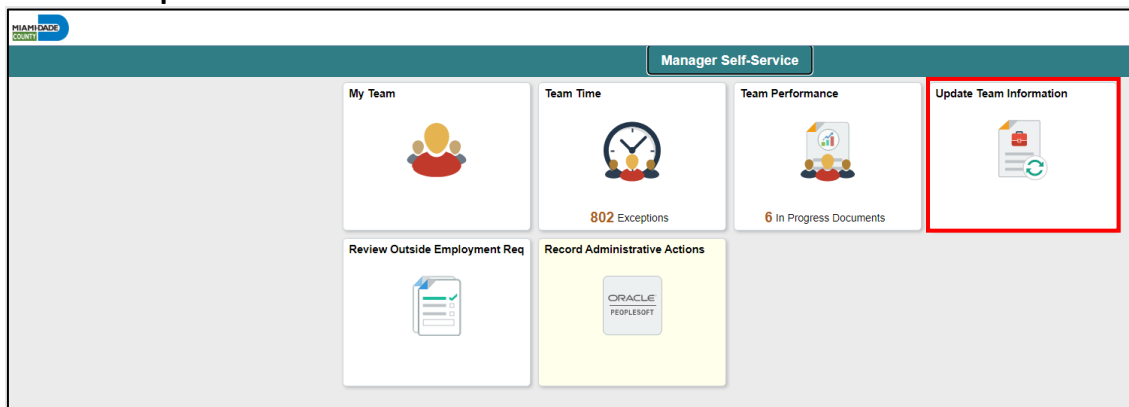
File a Return from Leave

As a Manager, file for a return from leave on behalf of an employee in INFORMS.

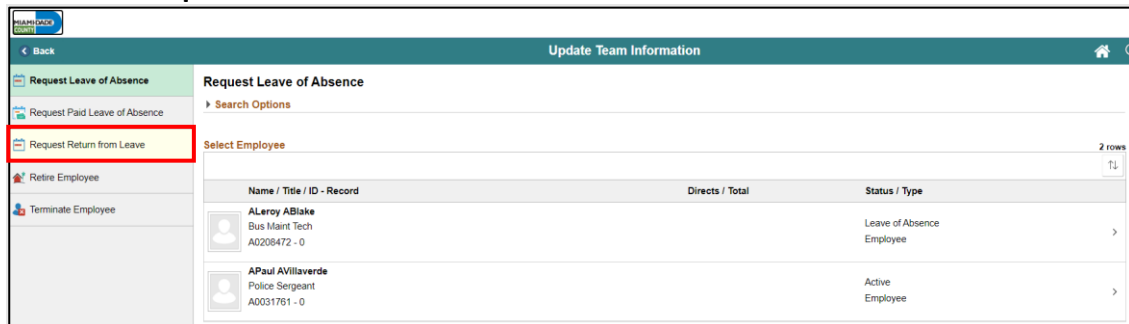
1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.



2. Select **Update Team Information**.



3. Select **Request Return from Leave**.



Lesson 4: Requesting leave on behalf of Employee

Lecture 2: File a Return from Leave

4. Select an employee who is requesting a return from leave.

The screenshot shows the 'Request Return from Leave' form in the 'Update Team Information' section. The 'Select Employee' step is active, displaying a table of employees. The first row, for 'ALeroy ABlake', is highlighted with a red border. The table has columns for 'Name / Title / ID - Record', 'Directs / Total', and 'Status / Type'.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul Avillaverde Police Sergeant A0031761 - 0		Active Employee

5. Confirm that the Reason is Return From Leave, and then select Next.

The screenshot shows the 'Request Return from Leave' form in the 'Job Detail' step. The 'Reason' dropdown menu is set to 'Return From Leave' and is highlighted with a red box. The form also displays 'Work and Job Information' and 'Current Information'.

Work and Job Information

*Transaction Date: 01/13/2022

Reason: Return From Leave

Current Information

Business Unit: Transportation & Public Works TP
Department: CAPITAL PROJECTS TPCP010000

6. Provide Comments as needed, and then select Submit.

The screenshot shows the 'Request Return from Leave' form in the 'Review & Submit' step. The 'Comments' field is highlighted with a red box. The form displays the same information as the previous steps, including the transaction date, reason, and current information.

Review and Submit

Transaction Date: 01/13/2022
Reason: Return From Leave

Current Information

Business Unit: Transportation & Public Works TP
Department: CAPITAL PROJECTS TPCP010000

Comments

Lesson 4: Training Activity 1

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

Scenario As a Manager submits a leave of absence on behalf of an employee.

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

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

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

Lesson 4: Training Exercise

Debrief



1. Managers can submit a leave of absence request on behalf of an employee.
 - a) True
 - b) False
2. Managers can submit a return from leave request on behalf of an employee.
 - a) True
 - b) False

Lesson 4: Lesson Summary

Objectives Achieved



Now that you have completed the Requesting Leave on behalf of Employee lesson, you should be able to:

- Submit a record for an employee's leave of absence
- Submit a record for an employee's return from leave

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the Manager Self-Service course. You now should be able to:

- Discipline Management
- Retirement and Voluntary Separation
- Involuntary Separation
- Requesting leave on behalf of Employee

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

- **Discipline Management (Record Disciplinary Action and Disciplinary Action Taken)**
- **Discipline Management (Record Disciplinary Resolution)**
- **Retirement and Voluntary Separation (Employee Retirement)**
- **Retirement and Voluntary Separation (Voluntary Separation)**
- **Retirement and Voluntary Separation (Approve Employee Retirement)**
- **Retirement and Voluntary Separation (Approve Employee Voluntary Separation)**
 - **Involuntary Separation**
- **Requesting Leave on behalf of Employee (Entering Leave of Absence)**
- **Requesting Leave on behalf of Employee (Requesting Return from Leave)**

Reference Materials (Cont.)

Reference Materials



For additional Information:

- www.miamidade.gov/informs

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
Disciplinary Action	Corrective action to reprimand the employee based on the violation.
Disciplinary Letter	A written memo addressed to the employee for the violation made.
Disciplinary Resolution	Recommended and final action that the company will take to resolve the violation made.
Violations	Policy or departmental based offenses made by the employee.
Retirement	The employee's decision to permanently leave the County.
Voluntary Separation	The employee's decision to resign from the County.
Involuntary Separation	Occurs when the department chooses to separate employees through reduction in force or by termination for conduct reasons.
LOA	Leave of Absence is a request for an employee to be absent from work for a period of time.