



Miami-Dade County

Financial Disclosures for DPRs Job Aid

Version 1.0

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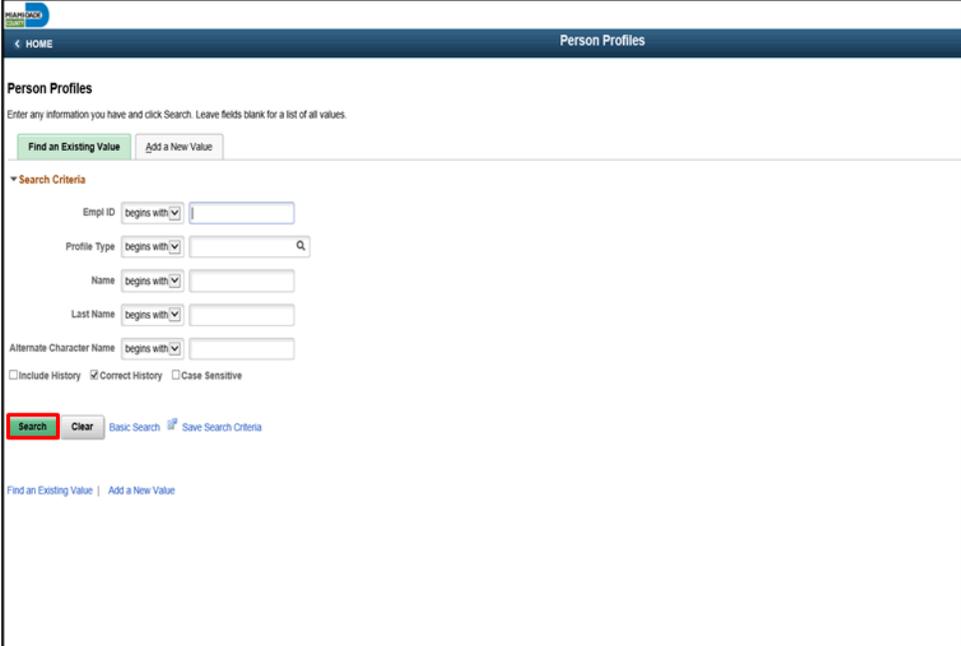
ADDING AND UPDATING FINANCIAL DISCLOSURES FOR DPRS Error! Bookmark not defined.

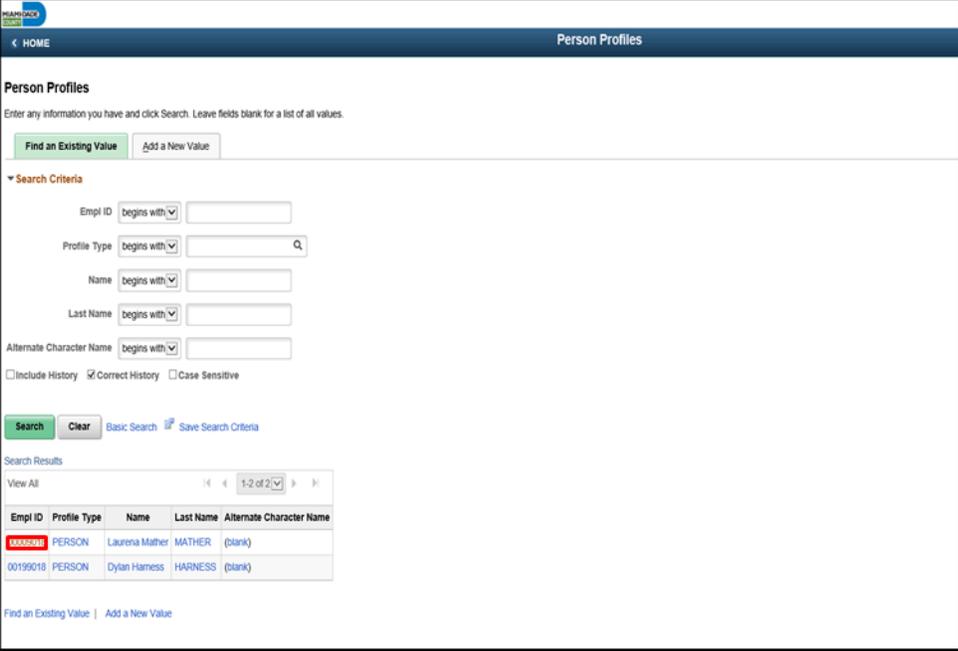
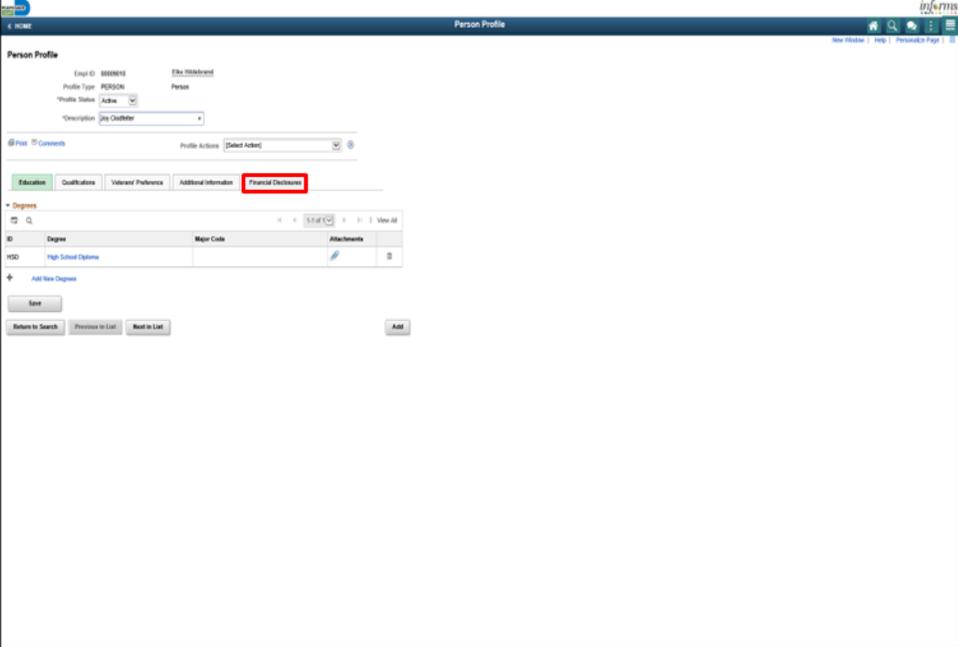
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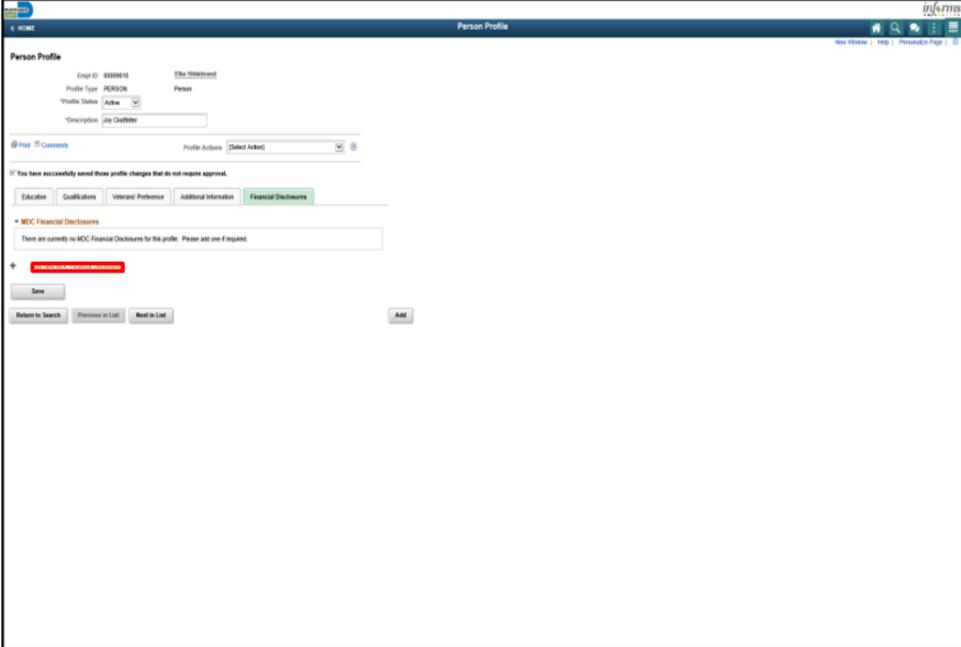
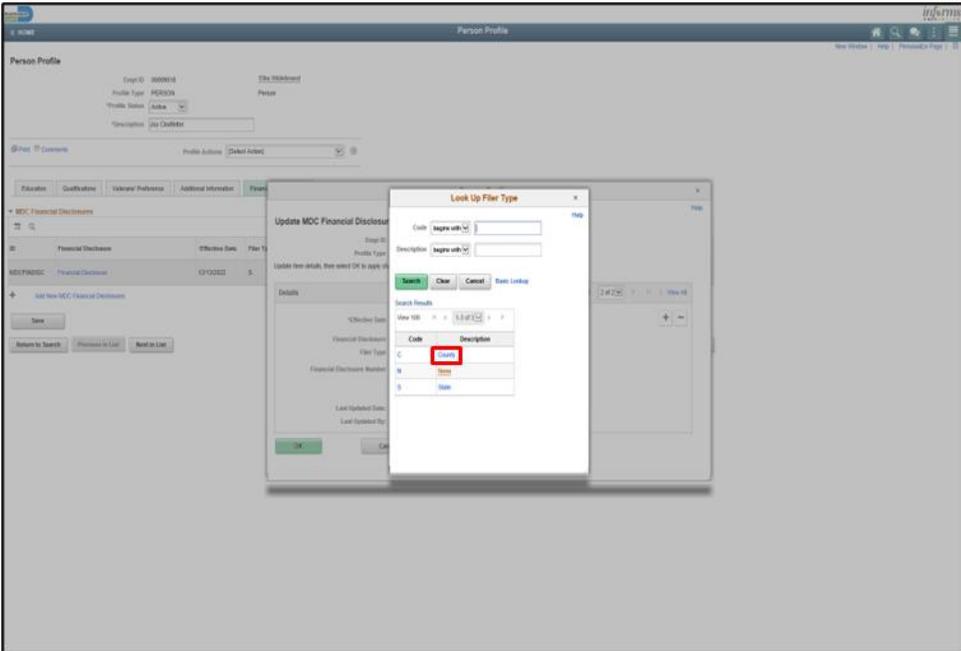
Purpose

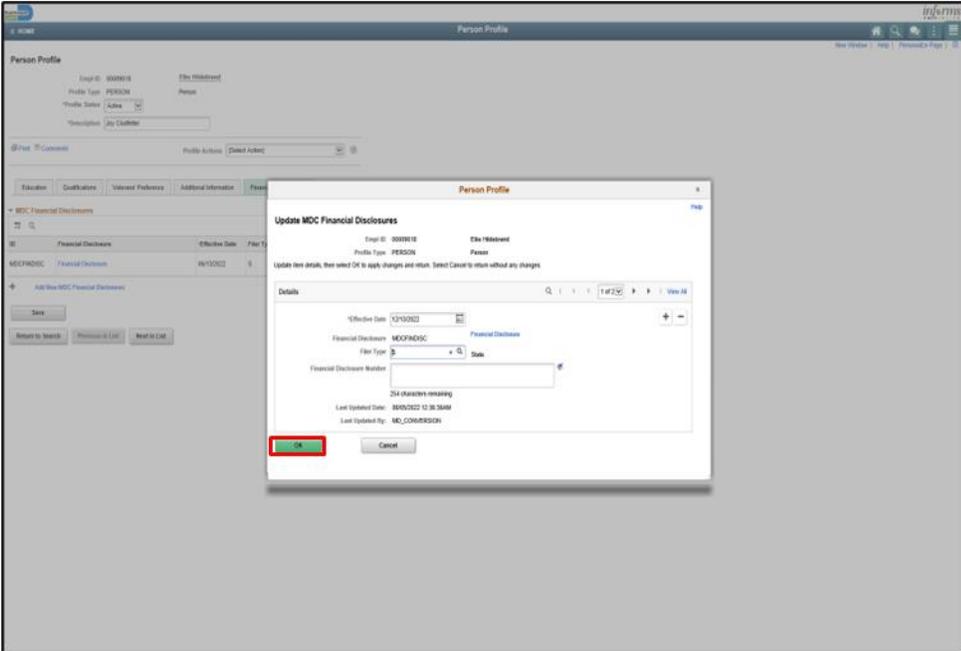
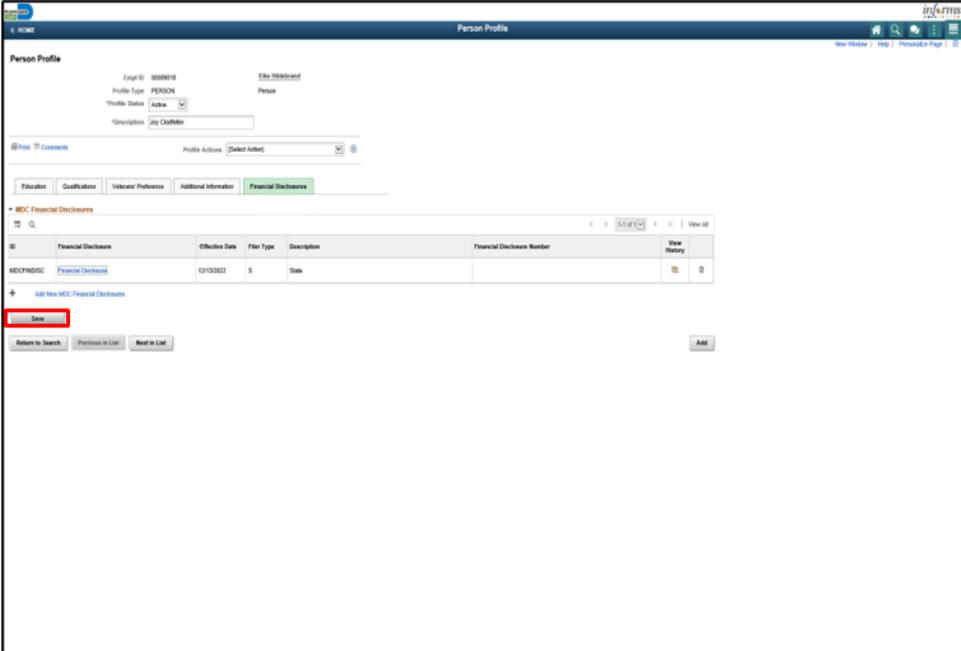
This document explains the key activities involved in adding and updating financial disclosures. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

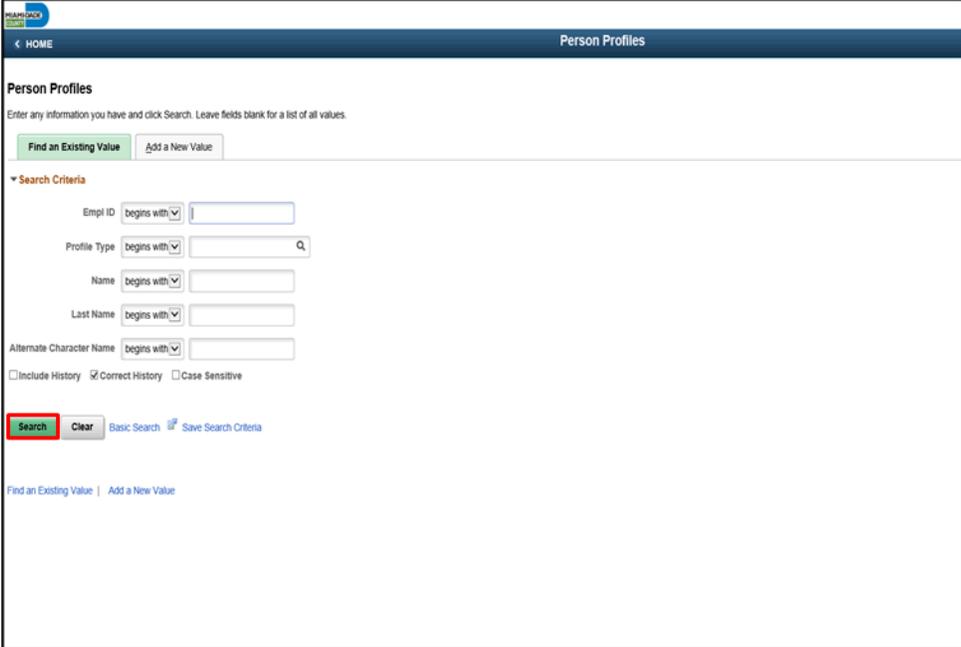
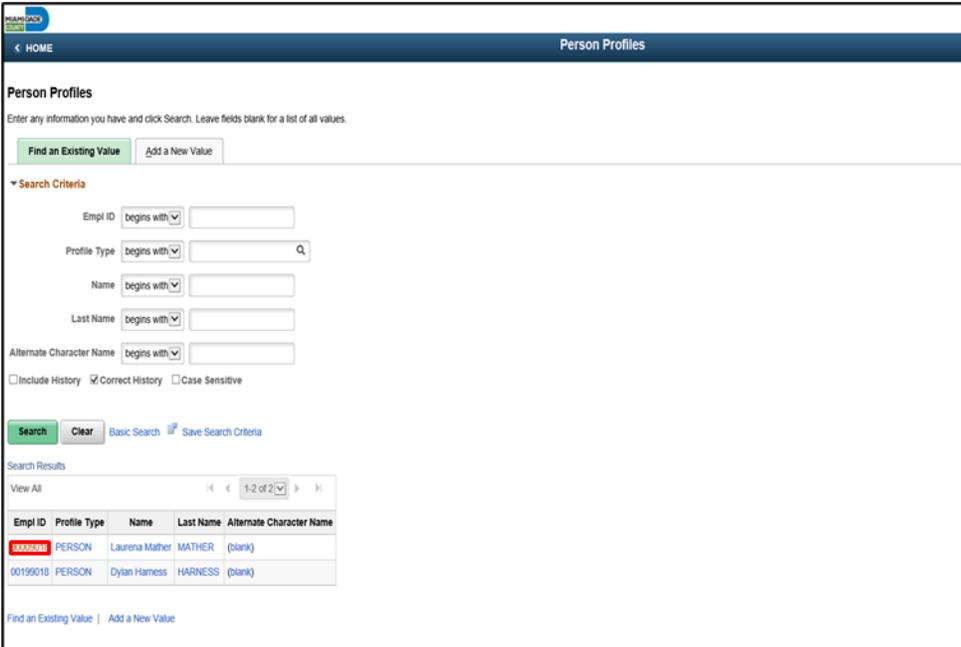
ADDING AND UPDATING FINANCIAL DISCLOSURES FOR DPRS

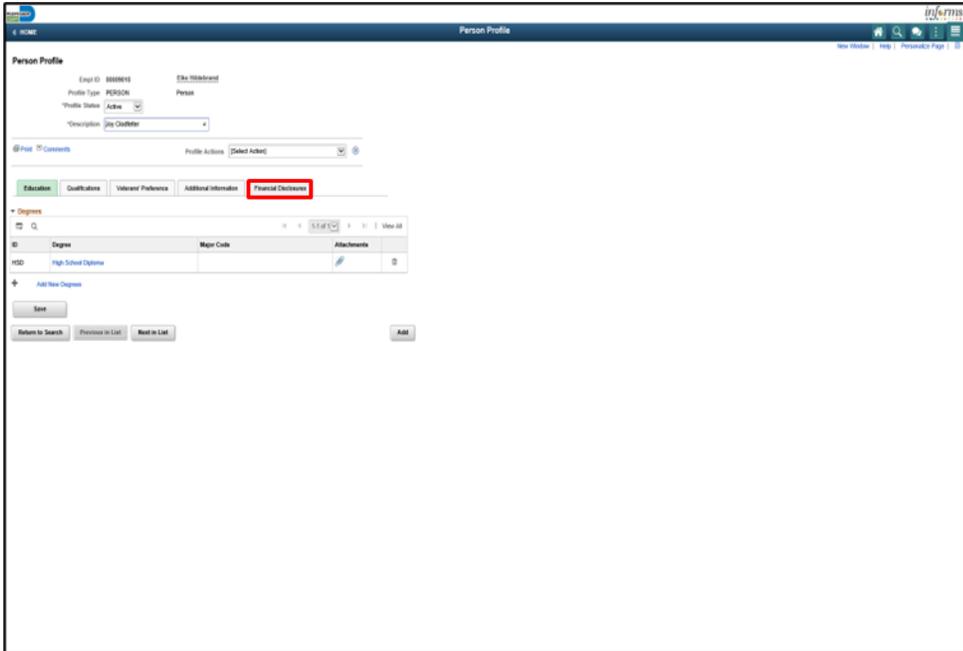
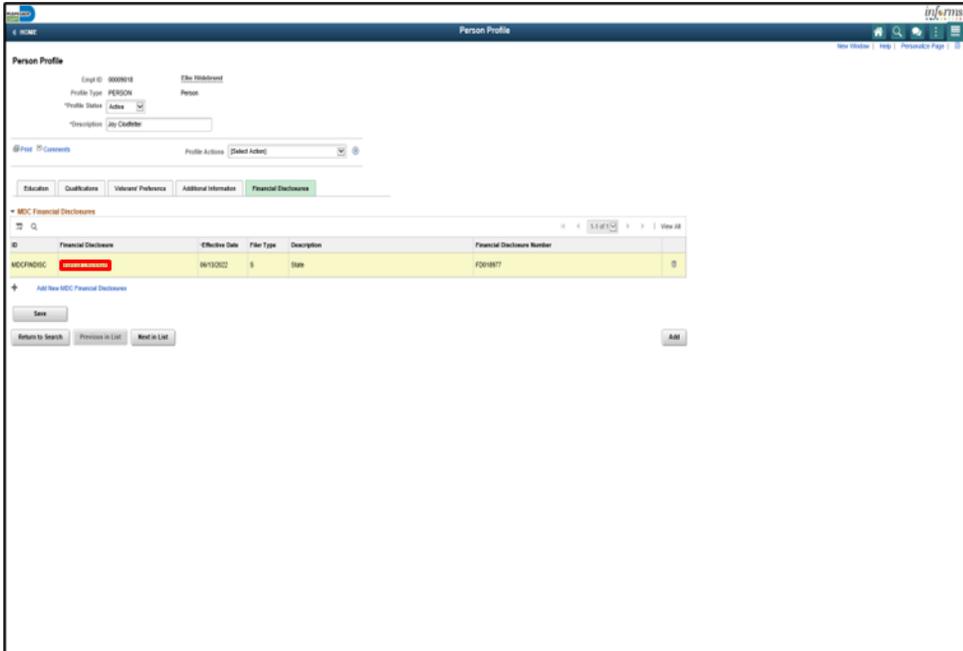
Step	Action
Add a Financial Disclosure for an employee that has never reported.	
1.	Navigate to: NavBar > Navigator > HCM > Workforce Development > Profile Management > Profiles > Manage Employee Profile
2.	<p>Input applicable search parameters then select the Search button.</p>  <p>The screenshot shows the 'Person Profiles' search page. It includes a header with 'Person Profiles' and a navigation breadcrumb. Below the header, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. A section titled 'Search Criteria' contains several search filters: 'Empl ID begins with', 'Profile Type begins with', 'Name begins with', 'Last Name begins with', and 'Alternate Character Name begins with'. Each filter has a dropdown menu and a text input field. At the bottom of the search criteria section, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. Below these are 'Search' and 'Clear' buttons, with 'Search' highlighted in red. There are also links for 'Basic Search' and 'Save Search Criteria'.</p>

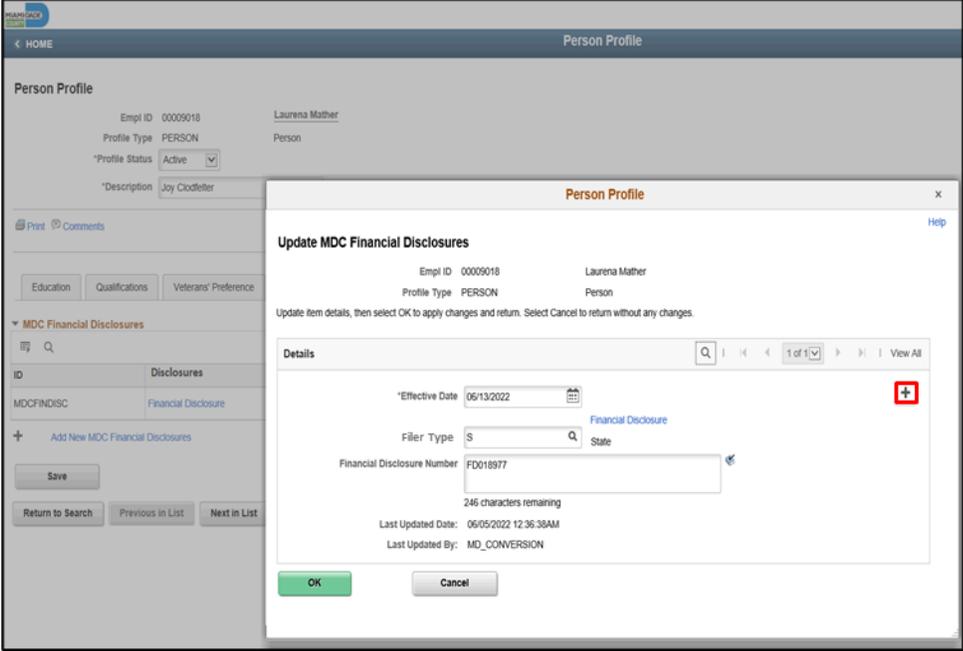
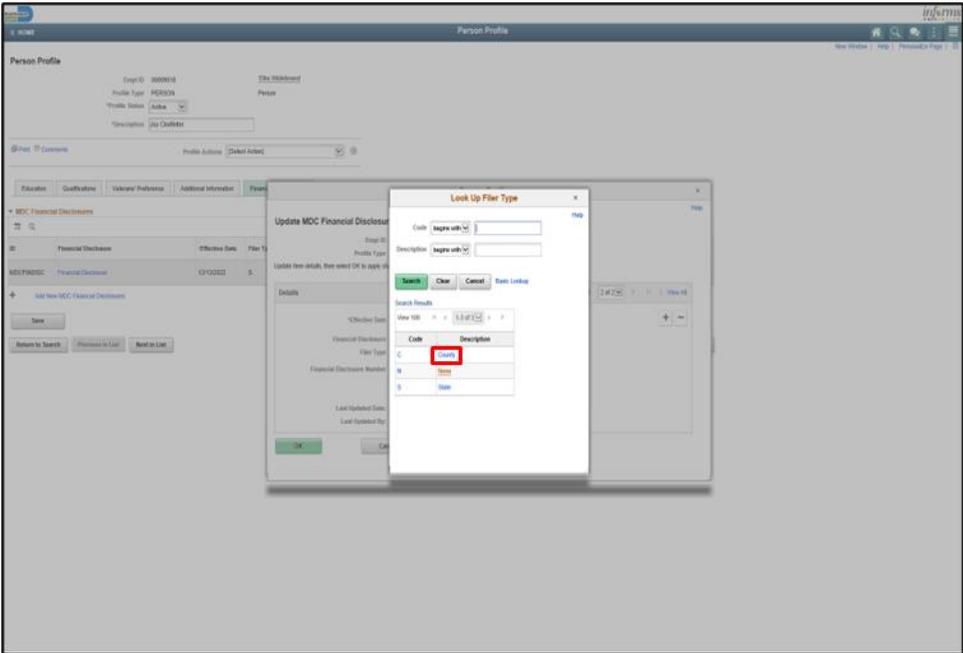
Step	Action															
3.	<p>Select the applicable employee.</p>  <table border="1" data-bbox="370 877 701 949"> <thead> <tr> <th>Empl ID</th> <th>Profile Type</th> <th>Name</th> <th>Last Name</th> <th>Alternate Character Name</th> </tr> </thead> <tbody> <tr> <td>00000000</td> <td>PERSON</td> <td>Laurena Mather</td> <td>MATHER</td> <td>(blank)</td> </tr> <tr> <td>00199018</td> <td>PERSON</td> <td>Dylan Harness</td> <td>HARNESS</td> <td>(blank)</td> </tr> </tbody> </table>	Empl ID	Profile Type	Name	Last Name	Alternate Character Name	00000000	PERSON	Laurena Mather	MATHER	(blank)	00199018	PERSON	Dylan Harness	HARNESS	(blank)
Empl ID	Profile Type	Name	Last Name	Alternate Character Name												
00000000	PERSON	Laurena Mather	MATHER	(blank)												
00199018	PERSON	Dylan Harness	HARNESS	(blank)												
4.	<p>Select the Financial Disclosures tab.</p>  <table border="1" data-bbox="370 1308 771 1346"> <thead> <tr> <th>ID</th> <th>Degree</th> <th>Major Code</th> <th>Attachments</th> </tr> </thead> <tbody> <tr> <td>HSD</td> <td>High School Diploma</td> <td></td> <td></td> </tr> </tbody> </table>	ID	Degree	Major Code	Attachments	HSD	High School Diploma									
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HSD	High School Diploma															

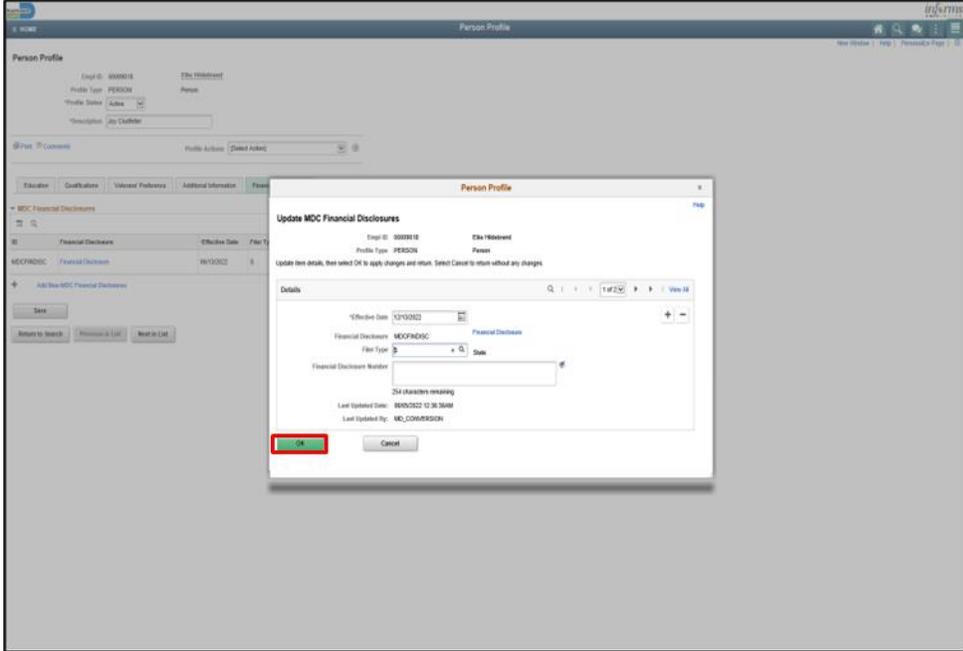
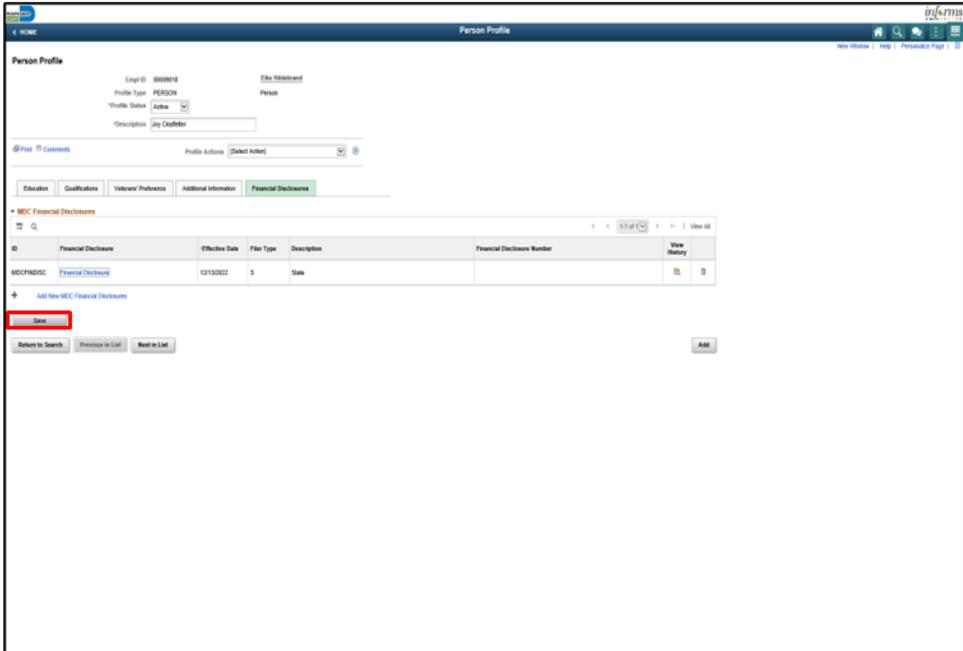
Step	Action
5.	<p>Select the Add New MDC Financial Disclosures link.</p> 
6.	<p>Input or search for the applicable Filer Type. C – County Filer S – State Filer N – Employee that used to file but no longer needs to file.</p> 

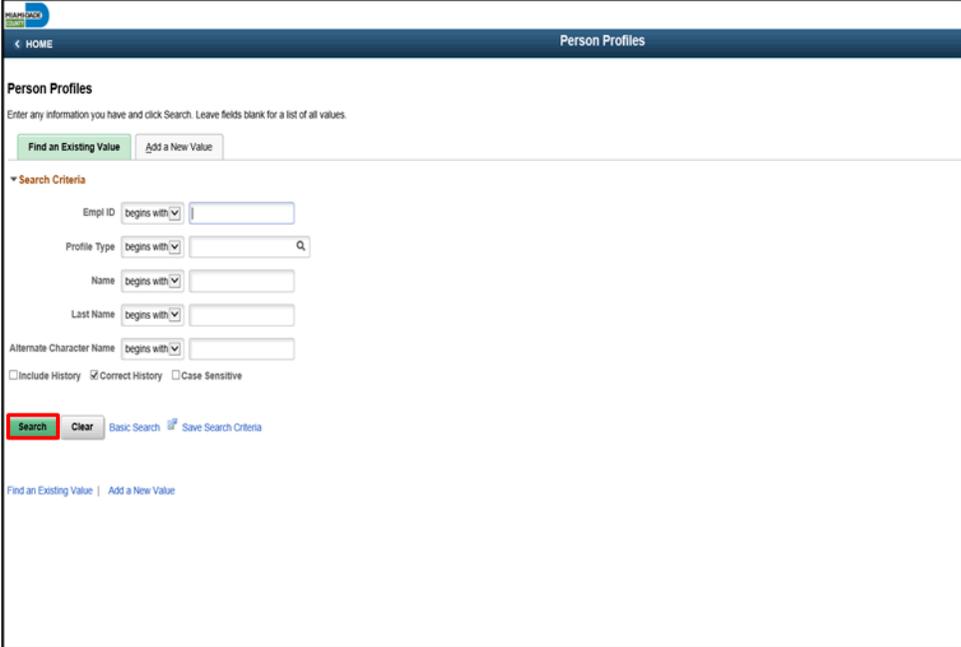
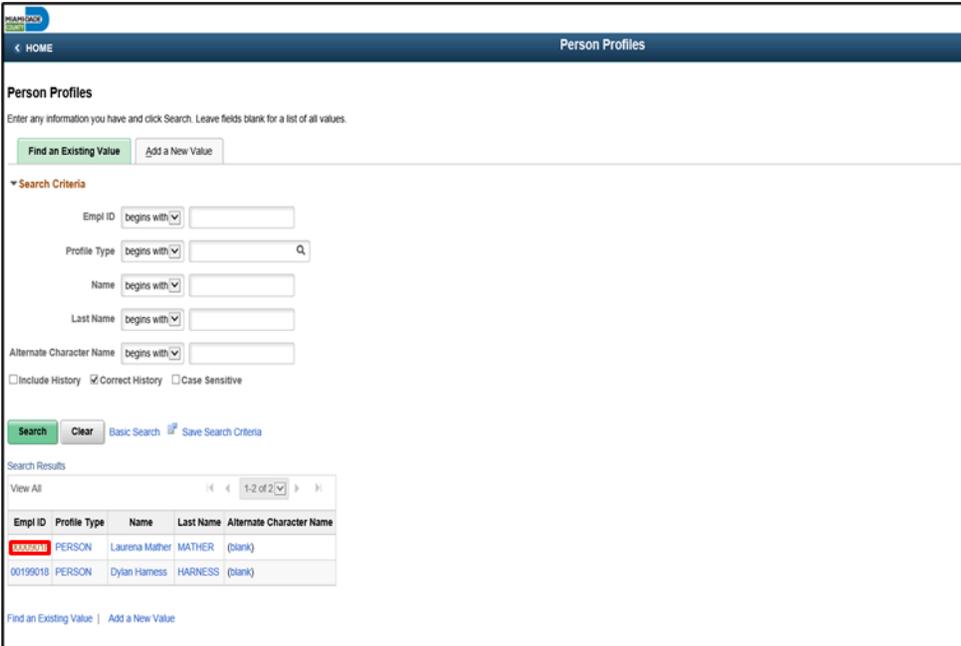
Step	Action
7.	<p>Select the OK button.</p> 
8.	<p>Select the Save button.</p> 
<p>Add a Financial Disclosure for an employee that has previously reported.</p>	
1.	<p>Navigate to: NavBar > Navigator > HCM > Workforce Development > Profile Management > Profiles > Manage Employee Profile</p>

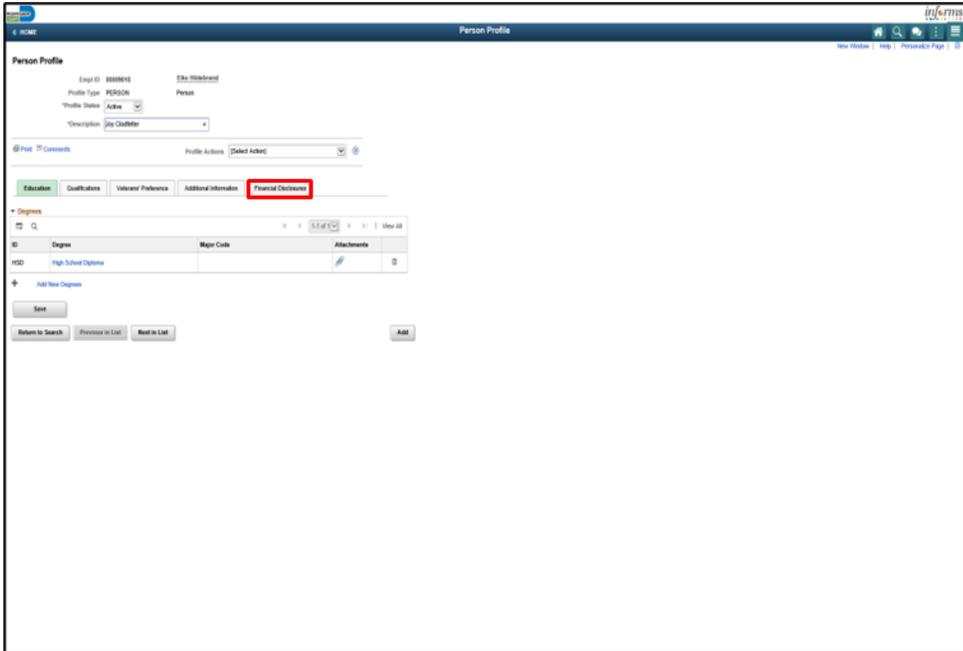
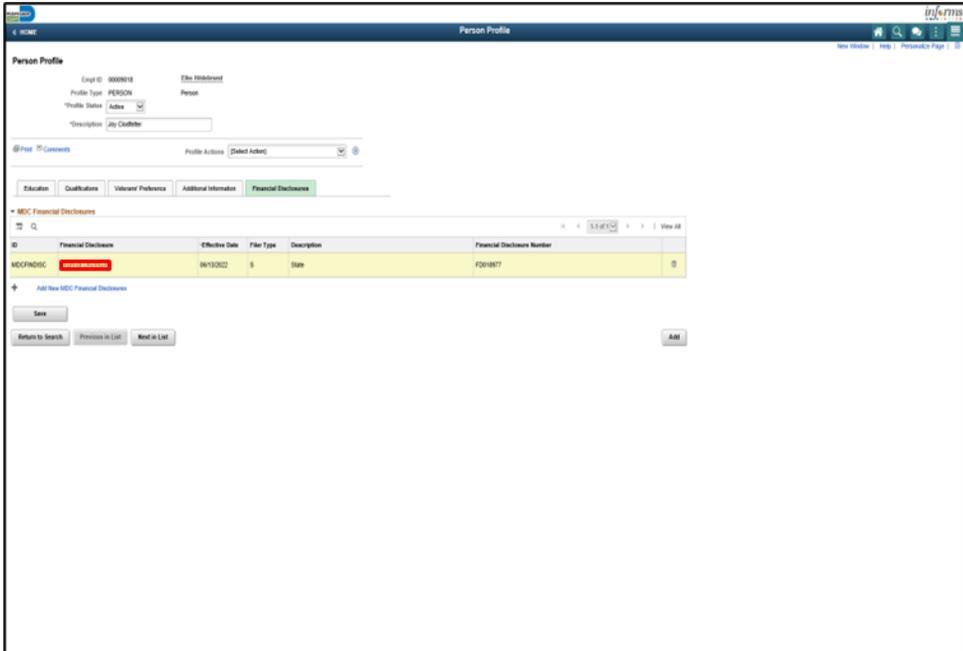
Step	Action															
2.	<p>Input applicable search parameters then select the Search button.</p>  <p>The screenshot shows the 'Person Profiles' search page. It includes a header with 'Person Profiles', a search instruction, and two buttons: 'Find an Existing Value' and 'Add a New Value'. Below is a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Profile Type', 'Name', 'Last Name', and 'Alternate Character Name', each followed by a text input field. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search criteria are buttons for 'Search' (highlighted in red), 'Clear', 'Basic Search', and 'Save Search Criteria'.</p>															
3.	<p>Select the applicable employee.</p>  <p>The screenshot shows the 'Person Profiles' search results page. It includes the same search criteria section as above. Below the search criteria is a 'Search Results' section with a 'View All' link and a pagination control showing '1-2 of 2'. A table of search results is displayed with the following data:</p> <table border="1" data-bbox="367 1577 703 1650"> <thead> <tr> <th>Empl ID</th> <th>Profile Type</th> <th>Name</th> <th>Last Name</th> <th>Alternate Character Name</th> </tr> </thead> <tbody> <tr> <td>00199010</td> <td>PERSON</td> <td>Laurena Mather</td> <td>MATHER</td> <td>(blank)</td> </tr> <tr> <td>00199010</td> <td>PERSON</td> <td>Dylan Harness</td> <td>HARNESS</td> <td>(blank)</td> </tr> </tbody> </table> <p>The first row of the table is highlighted with a red box. Below the table are links for 'Find an Existing Value' and 'Add a New Value'.</p>	Empl ID	Profile Type	Name	Last Name	Alternate Character Name	00199010	PERSON	Laurena Mather	MATHER	(blank)	00199010	PERSON	Dylan Harness	HARNESS	(blank)
Empl ID	Profile Type	Name	Last Name	Alternate Character Name												
00199010	PERSON	Laurena Mather	MATHER	(blank)												
00199010	PERSON	Dylan Harness	HARNESS	(blank)												

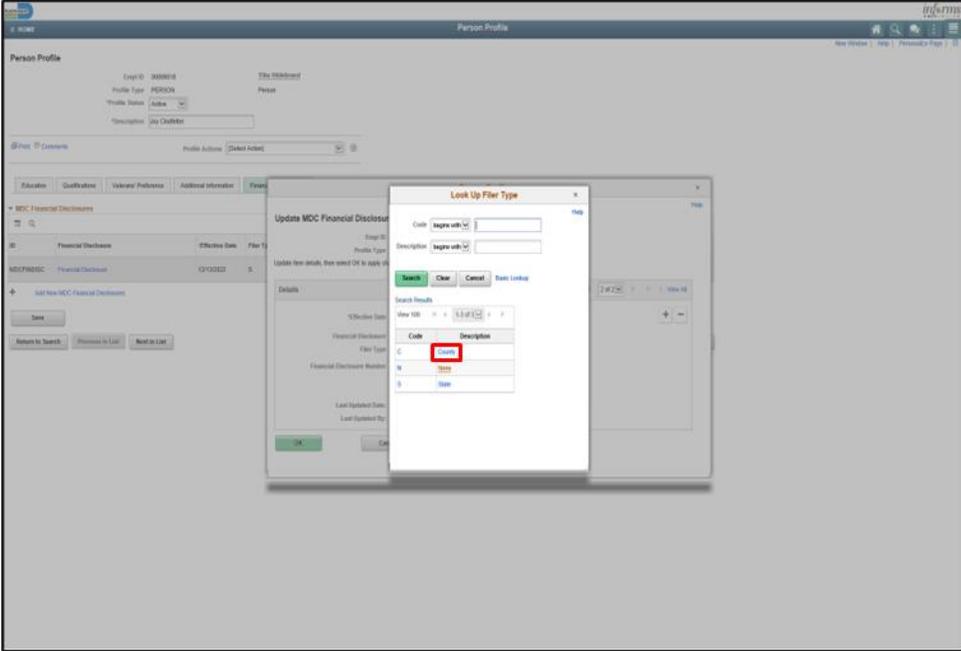
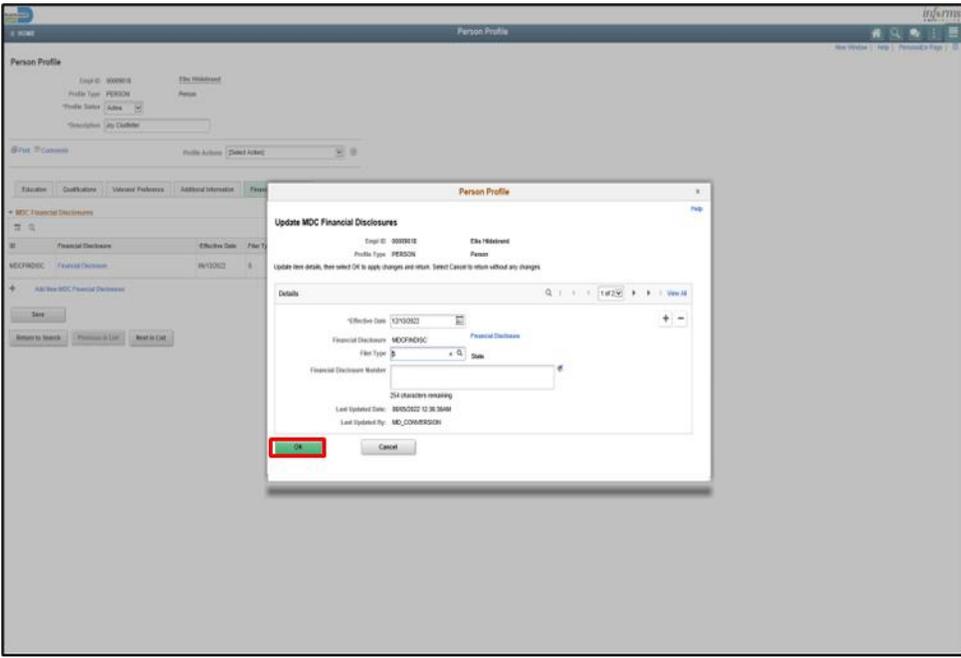
Step	Action												
<p>4.</p>	<p>Select the Financial Disclosures tab.</p>  <p>The screenshot shows the 'Person Profile' page for user 'Ella Hildbrand'. The 'Financial Disclosures' tab is highlighted with a red box. Below the tabs, there is a table for 'Degrees' with one entry: 'High School Diploma'.</p>												
<p>5.</p>	<p>Select the Financial Disclosures link.</p>  <p>The screenshot shows the 'Person Profile' page with the 'Financial Disclosures' tab selected. Below the tabs, there is a table for 'MOC Financial Disclosures' with one entry: 'MOC Financial Disclosure' with a red highlight on the 'Financial Disclosure' link.</p> <table border="1" data-bbox="365 1276 1047 1344"> <thead> <tr> <th>ID</th> <th>Financial Disclosure</th> <th>Effective Date</th> <th>File Type</th> <th>Description</th> <th>Financial Disclosure Number</th> </tr> </thead> <tbody> <tr> <td>NECPND5C</td> <td>MOC Financial Disclosure</td> <td>06/13/2022</td> <td>S</td> <td>State</td> <td>FDN1807</td> </tr> </tbody> </table>	ID	Financial Disclosure	Effective Date	File Type	Description	Financial Disclosure Number	NECPND5C	MOC Financial Disclosure	06/13/2022	S	State	FDN1807
ID	Financial Disclosure	Effective Date	File Type	Description	Financial Disclosure Number								
NECPND5C	MOC Financial Disclosure	06/13/2022	S	State	FDN1807								

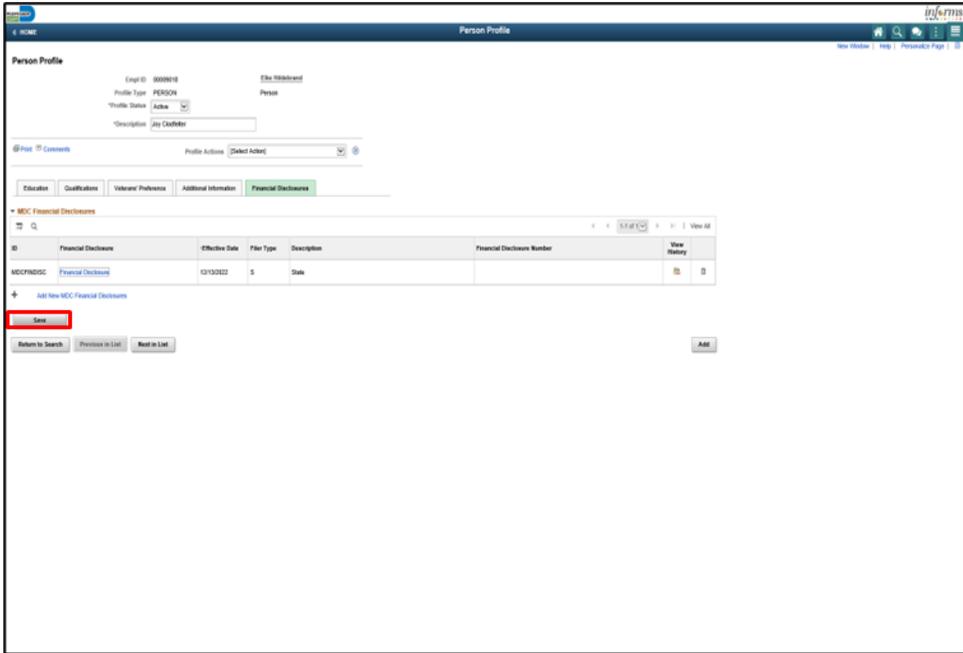
Step	Action
6.	<p>Select the + Add a new row object.</p> 
7.	<p>Input or search for the applicable Filer Type.</p> <p>C – County Filer S – State Filer N – Employee that used to file but no longer needs to file.</p> 

Step	Action
8.	<p>Select the OK button.</p> 
9.	<p>Select the Save button.</p> 
<p>Correct a Financial Disclosure for an employee that has previously reported.</p>	
1.	<p>Navigate to: NavBar > Navigator > HCM > Workforce Development > Profile Management > Profiles > Manage Employee Profile</p>

Step	Action															
<p>2.</p>	<p>Input applicable search parameters then select the Search button.</p>  <p>The screenshot shows the 'Person Profiles' search page. It includes a search criteria section with dropdown menus for 'Empl ID', 'Profile Type', 'Name', 'Last Name', and 'Alternate Character Name', each followed by a text input field. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. A 'Search' button is highlighted with a red box, and a 'Clear' button is next to it. Below the search criteria, there are links for 'Find an Existing Value' and 'Add a New Value'.</p>															
<p>3.</p>	<p>Select the applicable employee.</p>  <p>The screenshot shows the 'Person Profiles' search results page. It displays a table of search results with columns for 'Empl ID', 'Profile Type', 'Name', 'Last Name', and 'Alternate Character Name'. The first result is highlighted with a red box. Below the search criteria, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. A 'Search' button is highlighted with a green box, and a 'Clear' button is next to it. Below the search criteria, there are links for 'Find an Existing Value' and 'Add a New Value'.</p> <table border="1" data-bbox="367 1543 701 1654"> <thead> <tr> <th>Empl ID</th> <th>Profile Type</th> <th>Name</th> <th>Last Name</th> <th>Alternate Character Name</th> </tr> </thead> <tbody> <tr> <td>0000048</td> <td>PERSON</td> <td>Laurena Mather</td> <td>MATHER</td> <td>(blank)</td> </tr> <tr> <td>00199018</td> <td>PERSON</td> <td>Dylan Harness</td> <td>HARNES</td> <td>(blank)</td> </tr> </tbody> </table>	Empl ID	Profile Type	Name	Last Name	Alternate Character Name	0000048	PERSON	Laurena Mather	MATHER	(blank)	00199018	PERSON	Dylan Harness	HARNES	(blank)
Empl ID	Profile Type	Name	Last Name	Alternate Character Name												
0000048	PERSON	Laurena Mather	MATHER	(blank)												
00199018	PERSON	Dylan Harness	HARNES	(blank)												

Step	Action
<p>4.</p>	<p>Select the Financial Disclosures tab.</p>  <p>The screenshot shows the 'Person Profile' page for user 'Elin Wikstrand'. The 'Financial Disclosures' tab is highlighted with a red box. Below the tabs, there is a table for 'Degrees' with one entry: 'High School Diploma'.</p>
<p>5.</p>	<p>Select the Financial Disclosures link.</p>  <p>The screenshot shows the 'Person Profile' page with the 'Financial Disclosures' tab selected. Below the tabs, there is a table for 'MOC Financial Disclosures' with one entry: 'MOC Financial Disclosure' with ID 'MOCFINDISC', effective date '06/13/2022', and financial disclosure number 'FDN1807'.</p>

Step	Action
6.	<p>Input or search for the applicable File Type.</p> <p>C – County Filer S – State Filer N – Employee that used to file but no longer needs to file.</p> 
7.	<p>Select the OK button.</p> 

Step	Action
8.	<p>Select the Save button.</p>  <p>The screenshot shows the 'Person Profile' page in the 'informatics' system. The 'Financial Disclosures' tab is selected. Below the profile information, there is a table of financial disclosures. The table has columns for ID, Financial Disclosure, Effective Date, Filer Type, Description, Financial Disclosure Number, and View History. One entry is visible with ID 'NDPFDISC', 'Financial Disclosure', effective date '12/13/2022', filer type 'S', and description 'State'. Below the table, there is a '+ Add New MEC Financial Disclosures' link and a 'Save' button, which is highlighted with a red box. Other buttons include 'Return to Search', 'Previous in List', 'Next in List', and 'Add'.</p>