



## **Miami-Dade County**

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Leave Pool Donation Transfers to  
Recipients – Job Aid

## DESCRIPTION

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This job aid is for Central HR Administrators.

Leave Pool Functionality in INFORMS has been customized to fit Miami-Dade County's needs to handle/manage the Leave Pools in Dollars, whereas delivered functionality/Absence Management only handles Hours. Due to that difference, Administrators will adjust and move the hours/dollars between the pools and the eligible individuals needing to use the pool hours/dollars.

This document will help Administrators walk through the necessary steps to make an individual eligible as a Leave Transfer Recipient for a given Leave Pool (that is applicable for all Leave Pool Types, Department, Special Leave Pool Bank, or Individual pools) and then make the necessary adjustments to give hours/dollars to those eligible individuals so that they have available leave pool hours to use to take time off.

Administrators will need to make the employee an eligible Leave Transfer Recipient prior to giving Leave Pool hours/dollars. Otherwise, the adjustment functionality later in this job aid will error saying that the employee is not an eligible leave recipient and will not allow the user to save the transaction.

## LEAVE POOL DONATION TRANSFERS TO RECIPIENTS – JOB AID

Step	Action
1.	<p>Log into INFORMS and navigate to Leave Transfer Recipient Page: <b>INFORMS Main Menu &gt; Miami-Dade County &gt; Absence Management &gt; Extensions &gt; Leave Transfer Recipient.</b></p>
2.	<ul style="list-style-type: none"> <li>• Search for the <b>Leave Pool ID</b> being updated and go to the page.</li> <li>• Fill in the key fields:                             <ul style="list-style-type: none"> <li>○ <b>Empl Id.</b></li> <li>○ <b>Begin Date.</b></li> <li>○ <b>End Date</b> (optional).</li> <li>○ <b>Comments</b> (optional).</li> </ul> </li> <li>• For Individual Leave Pools: only one recipient should ever be added to this page, the employee concerned by that leave pool.</li> <li>• For Departmental Leave Pools, multiple employees at any given time can be recipients. Begin and End Dates can be used if a specific eligibility period is determined. Add as many rows as needed for the employees you need to make eligible recipients.</li> </ul> <div data-bbox="315 1081 1435 1650" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>The screenshot shows the 'Leave Transfer Recipients' interface. At the top, there's a navigation bar with 'Employee Self-Service' and 'Leave Transfer Recipients'. Below this, there are several key-value pairs: Country: USA, United States; Leave Program: 000000084; Status: Active; Description: HUMAN SERVICES; Short Description; Begin Date: 02/21/2000; End Date. A table titled 'List of Qualified Recipients' is highlighted with a red border. The table has columns: *Empl ID, Empl Record, Name, *Begin Date, End Date, and Comments. Below the table, there are search filters and buttons for 'Save', 'Return to Search', and 'Notify'.</p> </div>

	<p>Example:</p>
<p>3.</p>	<p>Once the employee was made an eligible leave transfer recipient, the Administrator can create adjustments to transfer some of the hours or dollars amounts from the Leave Pool to the individual needing Leave Pool hours to take time off.</p> <p>Navigate to Adjust Leave Program Balance page: <b>INFORMS Main Menu &gt; Miami-Dade County &gt; Absence Management &gt; Extensions &gt; Adjust Leave Program Balances.</b></p>
<p>4.</p>	<ul style="list-style-type: none"> <li>• Fill in the key fields:             <ul style="list-style-type: none"> <li>○ <b>Country:</b> USA.</li> <li>○ <b>Leave Program.</b></li> </ul> </li> <li>• Click <b>Add</b>.</li> </ul>

- Fill in the key fields on the page to give leave pool hours OR dollars to the individual (the system will calculate hours for you if you enter a dollar amount, use the employee’s hourly rate to determine the number of hours to give to the individual to use):
  - **Employee ID.**
  - **Target Entitlement:** Leave Pool.
  - **Adjustment Hours OR Adjustment Dollars:** The page grays out the other field if one of the two fields has a value, only allowing the user to make an Hours or Dollars adjustment. For individual pools, the user could use the total available balance to give the maximum number of dollars/hours available at that point in time.
  - **Reason (optional).**
  - Click **Save.**

5.

**Adjust Leave Program Balances**

Country USA United States Status Active  
 Leave Program 000000084 Description HUMAN SERVICES  
 Available Balance \$5064.49 \*Adjustment Date 06/13/2022

**Adjust Bank Balance**

Adjustment Dollars   
 Reason

**Adjust Individual Balances**

\*Employee ID  Record 0  
 Target Entitlement Leave Pool Adjustment Hours 40.00  
 Reason Giving 40 hours of Leave Pool for this individual Adjustment Dollars

Updated on 06/09/2022 12:15:24PM Updated By T0140356

**Save** Add

The administrator can review the Leave Pool History to confirm the transaction has been saved successfully and is ready to be processed or see if it has been processed by the custom Leave Donation process (run daily):

- Navigate to Leave Transfer Recipient Page: **INFORMS Main Menu > Miami-Dade County > Absence Management > Extensions > View Transaction History.**
- Search for the **Leave Program ID** being updated and open the page.

6.

**View Transaction History**

Country	USA	Status	Active	Total Donated	6637.62	Hours Collected	40,000
Leave Program	000000084	Description	HUMAN SERVICES	Total Used	1573.13	Used Hours	91,000
Category	Bank - Department Leave Pool			Total Available	5064.49	Collection Limit	

**Selection Criteria**

From Date:  To Date:

Request Type:  Transaction Status:

Empl ID From:  Empl ID To:

**Leave Transfer Transaction Information**

Empl ID	Job	Name	Request Type	Hours	Hourly Rate	Amount	Recipient Emplid	Workflow Status
86278823	0	Danny Morgan	Donate	4.00	32.708125	130.833		Approved
86278882	0	Harroldth Roman	Adjust	40.00	36.857750	1474.310		Approved

The user can see the Adjustment transaction, the hours, and the amount in dollars that will reduce the leave program balance once processed.

In the **Transfer Details** tab the user can see if the transaction has been processed or not in the **Transaction Status** field:

7.

**View Transaction History**

Country USA Status Active Total Donated 6637.62 Hours Collected 40.000  
 Leave Program 000000084 Description HUMAN SERVICES Total Used 1573.13 Used Hours 91.000  
 Category Bank - Department Leave Pool Total Available 5064.49 Collection Limit

**Selection Criteria**

From Date [ ] To Date [ ]  
 Request Type [ ] Transaction Status [ ]  
 Empl ID From [ ] Empl ID To [ ]  
 [Select with Matching Criteria] [Clear All]

**Leave Transfer Transaction Information**

Request Details **Transfer Details** |>>

Empl ID	Job	Name	Request Type	Hours	PI Entries	Transaction Status	Process Date
000000001	0	Clancy Morgan	Donate	4.00	PI Entries	Unprocessed	
000000002	0	Kenneth Stewart	Adjust	40.00	PI Entries	Unprocessed	

[Return to Search] [Notify]

8.

Once the daily Leave Donation process is run, the individual will have a balance of 40 hours available in their Leave Pool Balance and can start using the available hours.