



## **Miami-Dade County**

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# Manage Voluntary Charitable Contributions Job Aid

Version 1.0

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## PURPOSE

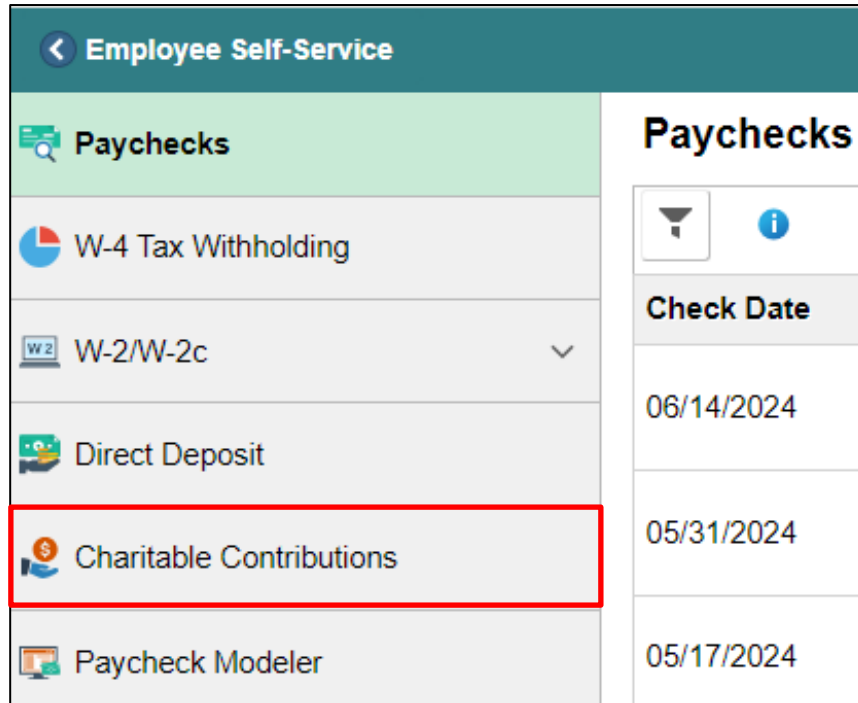
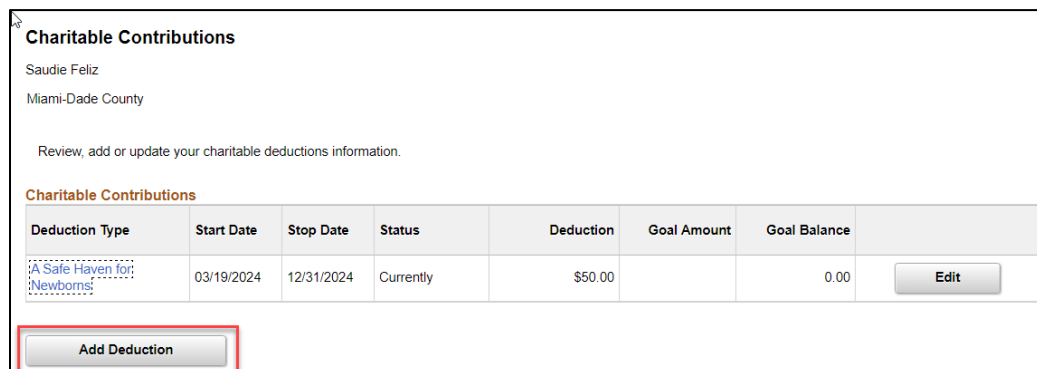
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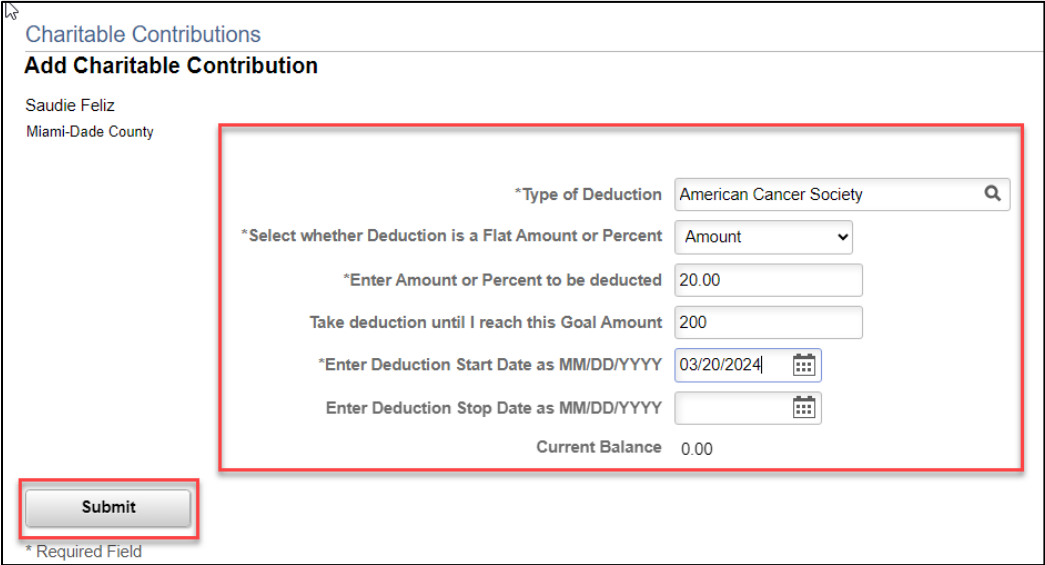
This job aid provides instructions on managing your Voluntary Charitable Contributions through Employee Self-Service pursuant to [Resolution R-1026-23](#), adopted by the Board of County Commissioners (BCC) on November 7, 2023. This document is for all employees.

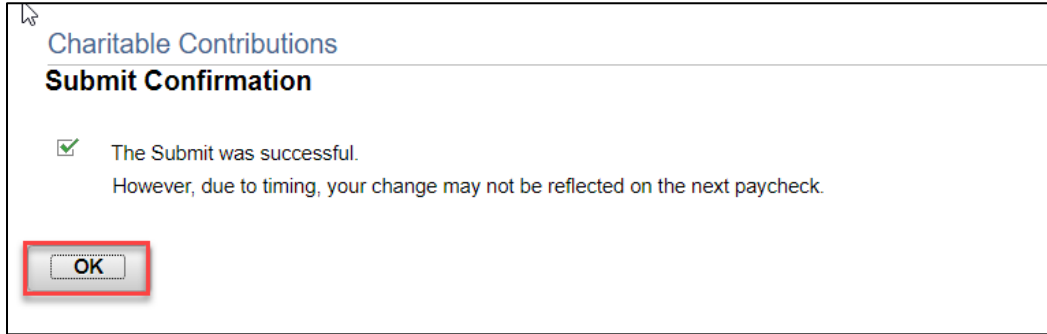
Here are some key points to keep in mind about managing voluntary charitable contributions online:

- You can enter as many voluntary charitable contributions as you like online for any amount
- Deductions may not appear in your next paycheck, depending on the timing of your entry.
- Deductions will continue until either you reach your specified goal amount or the stop date you specified is reached.
- You do not have to specify a stop date or goal amount.
- The system automatically keeps track of your deduction balances if you have entered a goal amount
- You can cancel a deduction by entering a stop date or changing the goal balance to equal the current deduction balance.
- Voluntary charitable contributions are limited to the charities available within INFORMS and will be expanded upon approval by the BCC.

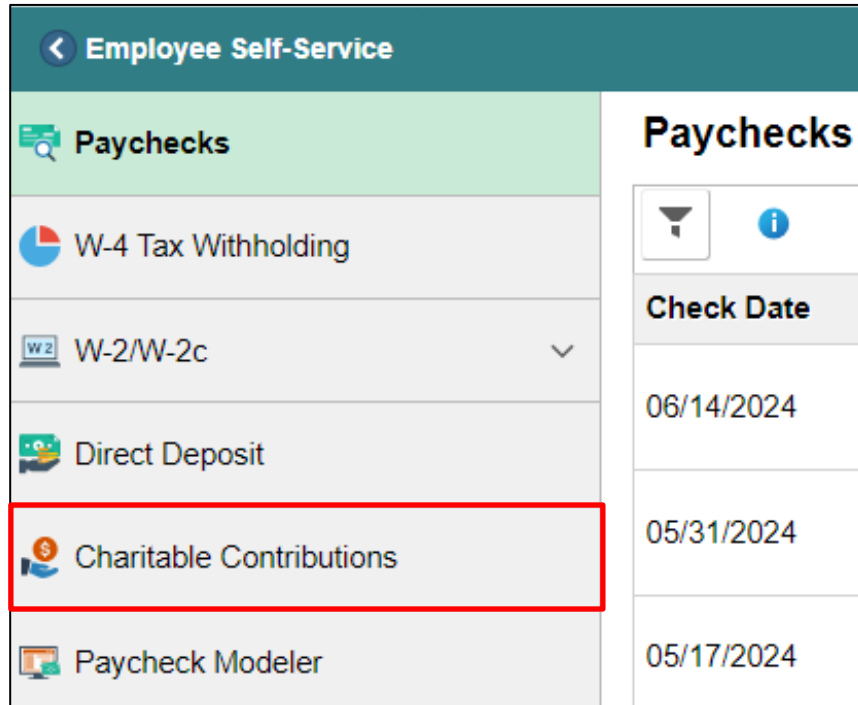
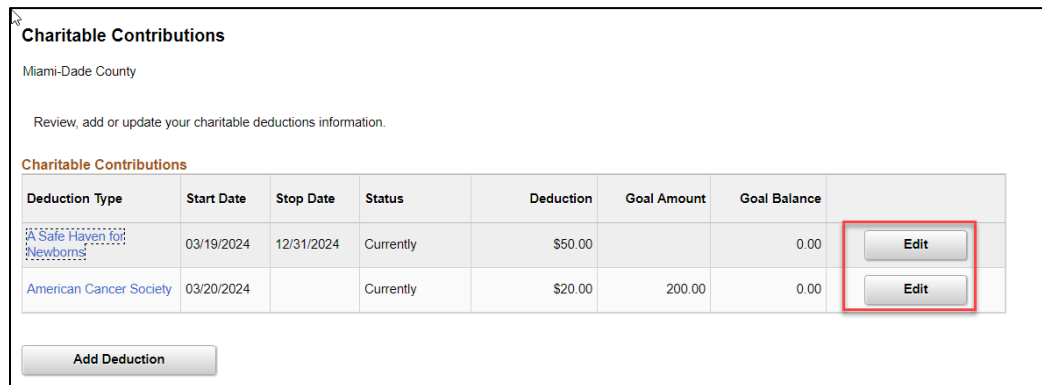
## ADDING A VOLUNTARY CHARITABLE CONTRIBUTION

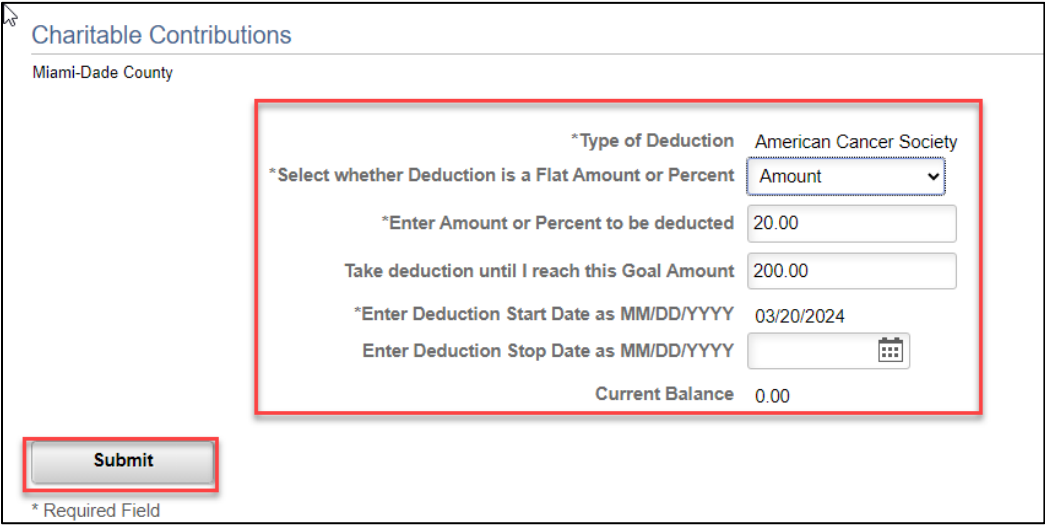
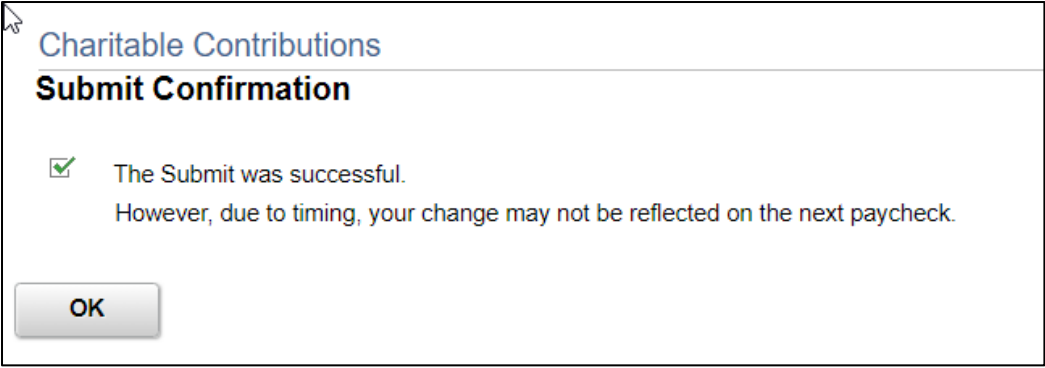
Step	Action
1.	Log into INFORMS and navigate to: <b>Employee Self-Service &gt; Payroll</b>
2.	Select <b>Charitable Contributions</b> from the menu selection on the left-hand pane. <div></div>
3.	Click on the <b>Add Deduction</b> button on the <b>Charitable Contributions</b> Summary page. <div></div>

Step	Action
4.	<p>In the <b>Charitable Contributions</b> detail page:</p> <ul style="list-style-type: none"> <li>Click on the magnifying glass icon next to <b>*Type of Deduction</b> to select from a list of available deductions.</li> <li>Select whether the deduction will be a <b>Flat Amount or Percent</b></li> <li>Enter the <b>Amount or Percent</b> to be deducted</li> <li><i>(Optional)</i> Enter a <b>Goal Amount</b></li> <li>Enter a Deduction <b>Start Date</b></li> <li><i>(Optional)</i> Enter a Deduction <b>Stop Date</b></li> <li>Finally, select the <b>Submit</b> button</li> </ul> <div data-bbox="370 726 1409 1287">  <p>The screenshot shows the 'Charitable Contributions' page with the title 'Add Charitable Contribution'. The user is 'Saudie Feliz' from 'Miami-Dade County'. A red box highlights the main form area containing the following fields: '*Type of Deduction' (set to 'American Cancer Society'), '*Select whether Deduction is a Flat Amount or Percent' (set to 'Amount'), '*Enter Amount or Percent to be deducted' (set to '20.00'), 'Take deduction until I reach this Goal Amount' (set to '200'), '*Enter Deduction Start Date as MM/DD/YYYY' (set to '03/20/2024'), 'Enter Deduction Stop Date as MM/DD/YYYY' (empty), and 'Current Balance' (set to '0.00'). A 'Submit' button is located at the bottom left of the form area. A legend indicates that an asterisk (*) denotes a required field.</p> </div> <p>In this example \$20 will be taken every pay period until the employee reaches the \$200 <b>Goal Amount</b>. The employee will have the deduction for approximately 10 pay periods.</p> <p>The <b>Goal Amount</b> field is optional, if left blank the employee will continue to be deducted until they choose to enter a <b>Stop Date</b>.</p>

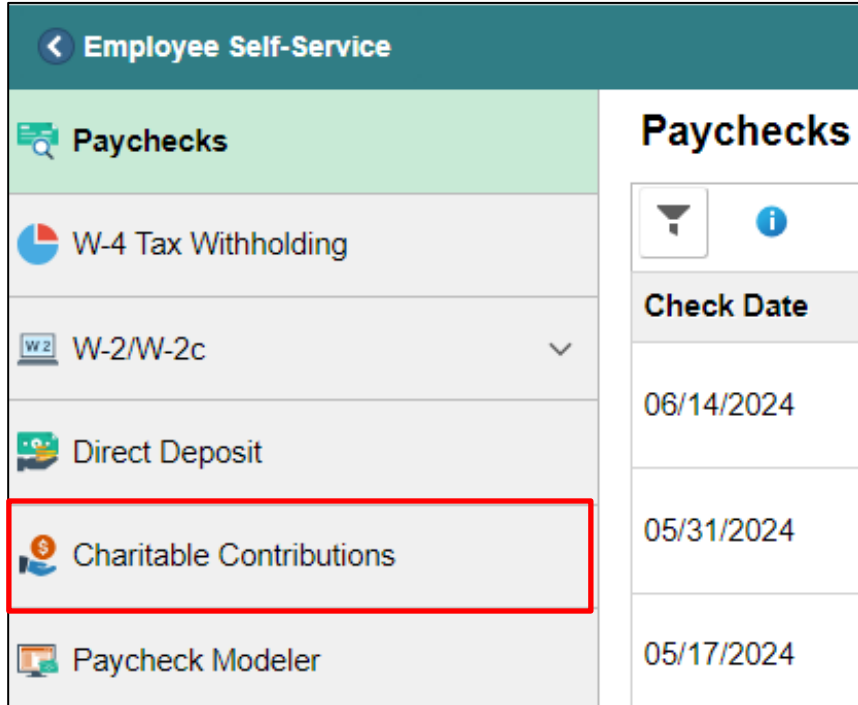
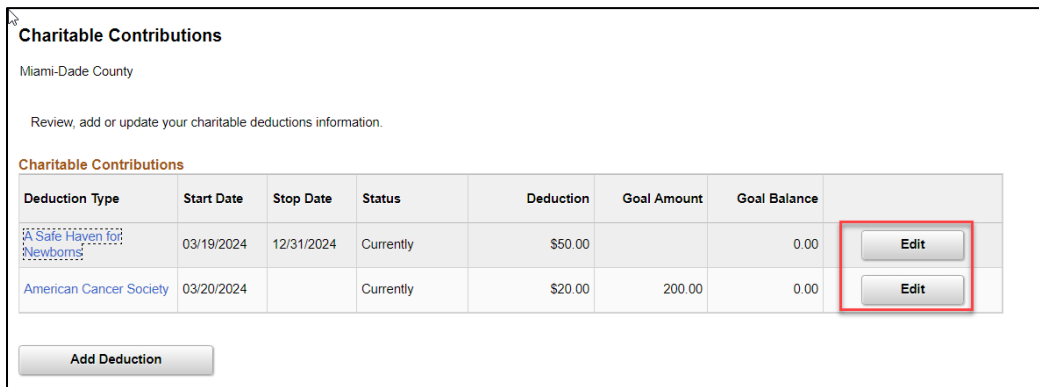
Step	Action
5.	<p data-bbox="365 327 1320 363">You will receive a confirmation message upon submission. Select the <b>OK</b> button.</p> <div data-bbox="365 407 1406 739"><p>The screenshot shows a confirmation dialog box titled "Charitable Contributions" with the subtitle "Submit Confirmation". It contains a green checkmark icon followed by the text "The Submit was successful." and "However, due to timing, your change may not be reflected on the next paycheck." At the bottom left of the dialog is an "OK" button, which is highlighted with a red rectangular box in the job aid.</p></div>

## EDITING AN EXISTING VOLUNTARY CHARITABLE CONTRIBUTION

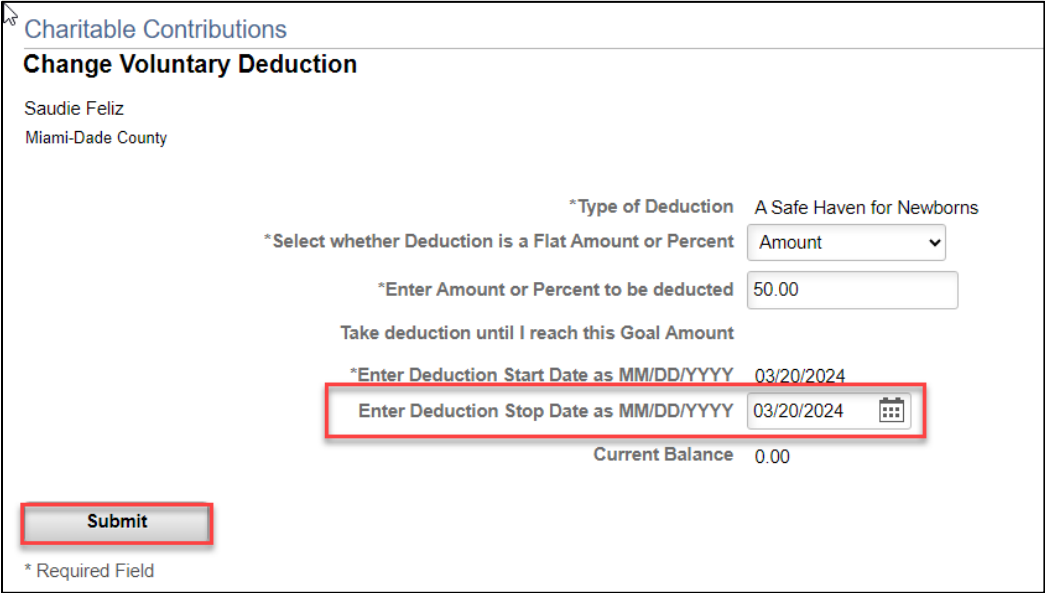
Step	Action
1.	Log into INFORMS and navigate to: <b>Employee Self-Service &gt; Payroll</b>
2.	Select <b>Charitable Contributions</b> from the menu selection on the left-hand pane. <div></div>
3.	Click on the <b>Edit</b> button on the <b>Charitable Contributions</b> summary page. <div></div>

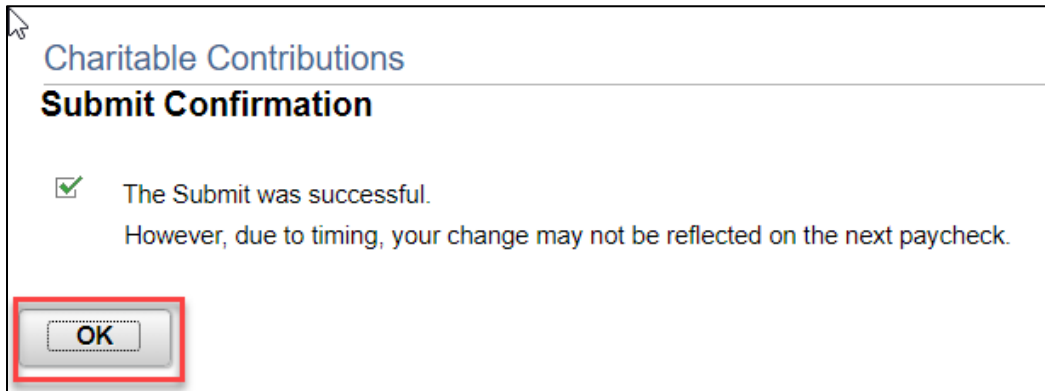
Step	Action
4.	<p>In the <b>Charitable Contributions</b> detail page, you have the option of editing:</p> <ul style="list-style-type: none"> <li>• <b>Type of Deduction</b></li> <li>• <b>Deduct as a flat Amount or percent</b></li> <li>• <b>Amount or Percent</b> to be deducted bi-weekly.</li> <li>• <b>Goal Amount</b></li> <li>• <b>Stop Date</b></li> <li>• Finally, select the <b>Submit</b> button when all updates are made.</li> </ul>  <p>* Required Field</p>
5.	<p>You will receive a confirmation message upon submission. Select the <b>OK</b> button.</p> 

## ENDING AN EXISTING VOLUNTARY CHARITABLE CONTRIBUTION

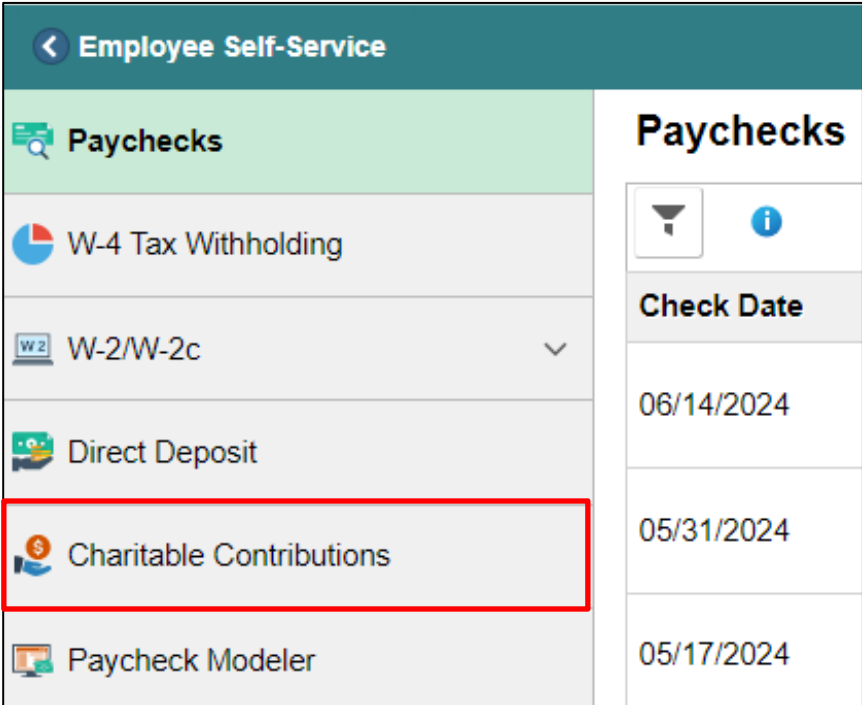
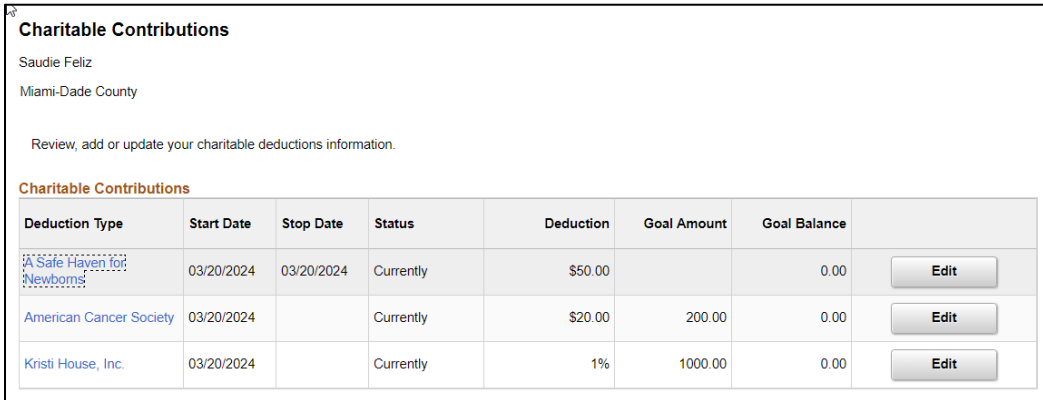
Step	Action
1.	Log into INFORMS and navigate to: <b>Employee Self-Service &gt; Payroll</b>
2.	<p>Select <b>Charitable Contributions</b> from the menu selection on the left-hand pane.</p>  <p>The screenshot shows the 'Employee Self-Service' interface. On the left, a menu lists options: Paychecks, W-4 Tax Withholding, W-2/W-2c, Direct Deposit, Charitable Contributions (highlighted with a red box), and Paycheck Modeler. On the right, the 'Paychecks' section displays a 'Check Date' list with dates: 06/14/2024, 05/31/2024, and 05/17/2024.</p>
3.	<p>Click on the <b>Edit</b> button on the <b>Charitable Contributions</b> summary page.</p>  <p>The screenshot shows the 'Charitable Contributions' summary page for Miami-Dade County. It includes a table with columns: Deduction Type, Start Date, Stop Date, Status, Deduction, Goal Amount, and Goal Balance. Two deductions are listed: 'A Safe Haven for Newborns' and 'American Cancer Society'. The 'Edit' button for the 'American Cancer Society' deduction is highlighted with a red box. An 'Add Deduction' button is located at the bottom.</p>



Step	Action
4.	<p>In the <b>Charitable Contributions</b> Detail page:</p> <ul style="list-style-type: none"> <li>Add a deduction <b>Stop Date</b></li> <li>Select the <b>Submit</b> button when the update is made.</li> </ul> <p>Please note the following:</p> <ul style="list-style-type: none"> <li>If <b>Deduction Stop Date</b> is the same as <b>Deduction Start Date</b>, the deduction will not be taken.</li> <li>If an amount is entered in the <b>Goal Amount</b> field and a <b>Stop Date</b> is entered, the deduction will stop at stop date regardless of whether the goal amount has been reached.</li> </ul> <div>  <p>The screenshot shows the 'Charitable Contributions' section with the title 'Change Voluntary Deduction'. Below the title, the user's name 'Saudie Feliz' and 'Miami-Dade County' are listed. The form includes several fields: '*Type of Deduction' set to 'A Safe Haven for Newborns', '*Select whether Deduction is a Flat Amount or Percent' set to 'Amount', and '*Enter Amount or Percent to be deducted' set to '50.00'. There is a section 'Take deduction until I reach this Goal Amount' with '*Enter Deduction Start Date as MM/DD/YYYY' set to '03/20/2024' and '*Enter Deduction Stop Date as MM/DD/YYYY' set to '03/20/2024'. The 'Stop Date' field is highlighted with a red box. At the bottom, there is a 'Submit' button, also highlighted with a red box, and a note '* Required Field'.</p> </div>

Step	Action
5.	<p data-bbox="365 325 1321 359">You will receive a confirmation message upon submission. Select the <b>OK</b> button.</p> <div data-bbox="365 405 1406 793"><p>The screenshot shows a dialog box titled "Charitable Contributions" with a subtitle "Submit Confirmation". It contains a green checkmark icon followed by the text "The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck." At the bottom left, there is a button labeled "OK" which is highlighted with a red rectangular border.</p></div>

## VIEWING VOLUNTARY CHARITABLE CONTRIBUTIONS

Step	Action
1.	Log into INFORMS and navigate to: <b>Employee Self-Service &gt; Payroll</b>
2.	Select <b>Charitable Contributions</b> from the menu selection on the left-hand pane. <div></div>
3.	<p>The <b>Charitable Contributions</b> summary page is shown. This page will show all your voluntary charitable contributions.</p> <p><b>**The Goal balance will reflect the balance of what has currently been deducted.</b></p> <div></div>