

Course ID: DPR 301  
Course: Departmental HR - ePerformance  
Management (Employee Performance Evaluation)

# Ground Rules



Be on time



Attendance



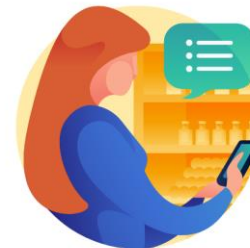
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the ePerformance processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>● Module 1: Course Introduction</li><li>● Module 2: ePerformance<ul style="list-style-type: none"><li>○ Administrative Tasks</li><li>○ Completing evaluation</li><li>○ Reports and Queries</li></ul></li><li>● Module 3: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>● Department Personnel Representatives (DPRs)</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>● ERP 101 – Overview of INFORMS</li><li>● ERP 102 – INFORMS Navigation, Reporting, and Online Help</li><li>● HR 101 – Human Resources Fundamentals</li></ul>

# Course Overview, Continued

<b>Other Related Courses</b>	Participants can attend the other related courses to Departmental HR: <ul style="list-style-type: none"><li>• DPR 302 – Departmental HR - Personnel Changes</li><li>• DPR 303 – Departmental HR - Time Management</li><li>• DPR 304 – Departmental HR - Updating Team Information</li><li>• DPR 321 – Departmental HR - Recruitment</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 5 hours</li></ul>

# Module 1: Course Introduction

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

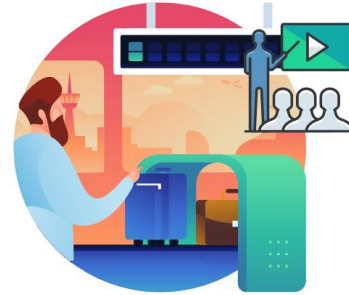
The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

# Course Administration and Logistics



To receive credit for completing this course, Users must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

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

- Perform Administrative Tasks
- Complete a Performance Evaluation
- Understand Performance Reports and Queries

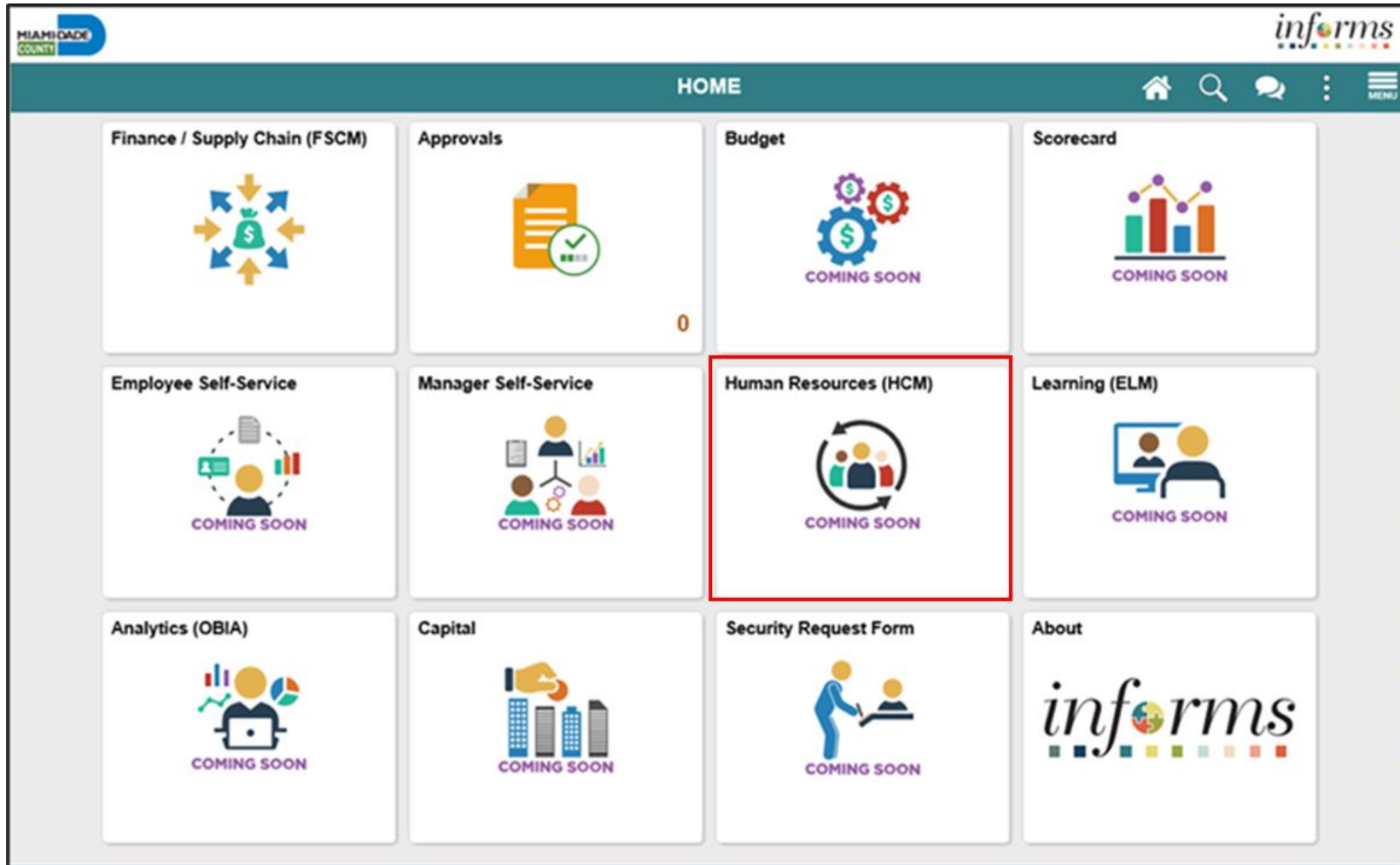
# Roles and Responsibilities

Role	Responsibilities
<b>Department Personnel Representative (DPR)</b>	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.



# Navigation

Login to INFORMS and select the Human Resource (HCM) tile from the HOME landing page.



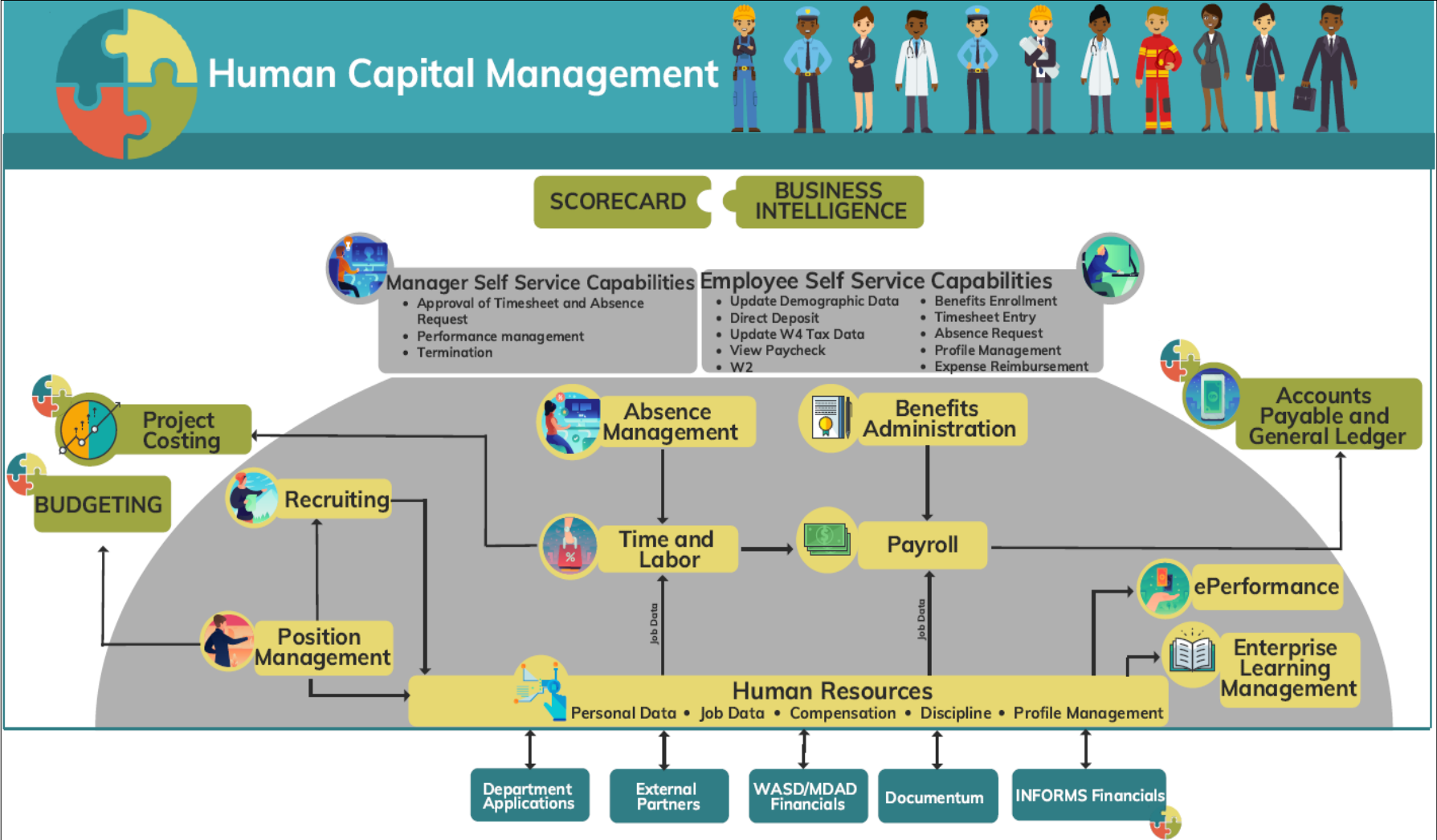
# Purpose and Benefits to Business Process

- Automation of County workforce performance evaluation business process
- Data persistence – old INFORMS data is never deleted, only past-effective dated and inactivated (superseded)
- Decreased data redundancy - Perform all performance evaluation administration activities in a single common system (INFORMS) - eliminating manual data re-keying, 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/rapid pro forma and ad hoc report development and deployment capabilities
- Ensure dynamic compliance with Human Resources business logic and consistent/identical business processes, Payroll salary grade table, Administrative Orders, Personnel Rules and ratified Collective Bargaining Agreements

# Purpose and Benefits to Business Process (continued)

- Improve workforce efficiency via collaborative processing – reviewers and approvers
- Logical separation of duties - Department Personnel Representatives (DPR) role ensures Central HR control and consistency from a dedicated Departmental context and perspective
- Robust technical platform – high on-demand availability with minimum downtime, scalable, 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 and collective bargaining agreement ratification dates, not by arbitrary calendar dates or all at the same time

# End-to-End Business Process

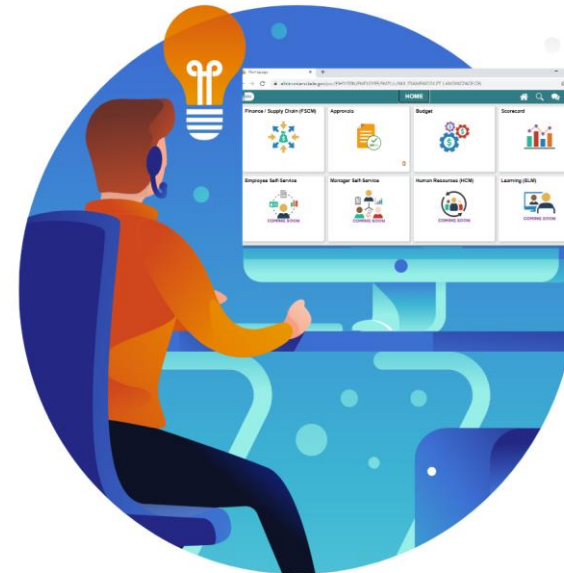


# Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.



Training  
Activities



Training  
Exercises

# Module 1: Course Introduction Summary

## Module Topics

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, Activities, and Exercises

# Module 2: ePerformance

## Module Topics

Module introduction

### Lesson 1: Administrative Tasks

- **Lecture 1:** Manually Create Documents
- **Lecture 2:** Cancel Evaluation
- **Lecture 3:** Transfer Evaluation
- **Lecture 4:** Re-Open Evaluation

### Lesson 2: Completing Evaluation

- **Lecture 1:** Initiate Merit Increase

### Lesson 3: Reports and Queries

# Lesson 1: Administrative Tasks

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

- Manually Create Performance Documents
- Cancel Performance Evaluation Documents
- Transfer Performance Evaluation Documents
- Re-Open Performance Evaluation Documents

**Only DPRs perform Administrative Tasks in INFORMS.**



# Lesson 1: Key Terms

Term	Definition
<b>Document Status</b>	The current state of an Evaluation - <b>Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started, or Review Held.</b>
<b>Document Type</b>	Document Review Type refers to the format used to generate Performance Document Review Type varies based upon which Employee will be reviewed: <b>MDC SR. MANAGEMENT MX</b> (for Management Evaluation), <b>MDC-Annual Review EE</b> (for Employee Evaluation), or <b>MDC-Prof/Supervisory Review ME</b> (for Senior Manager Evaluation).

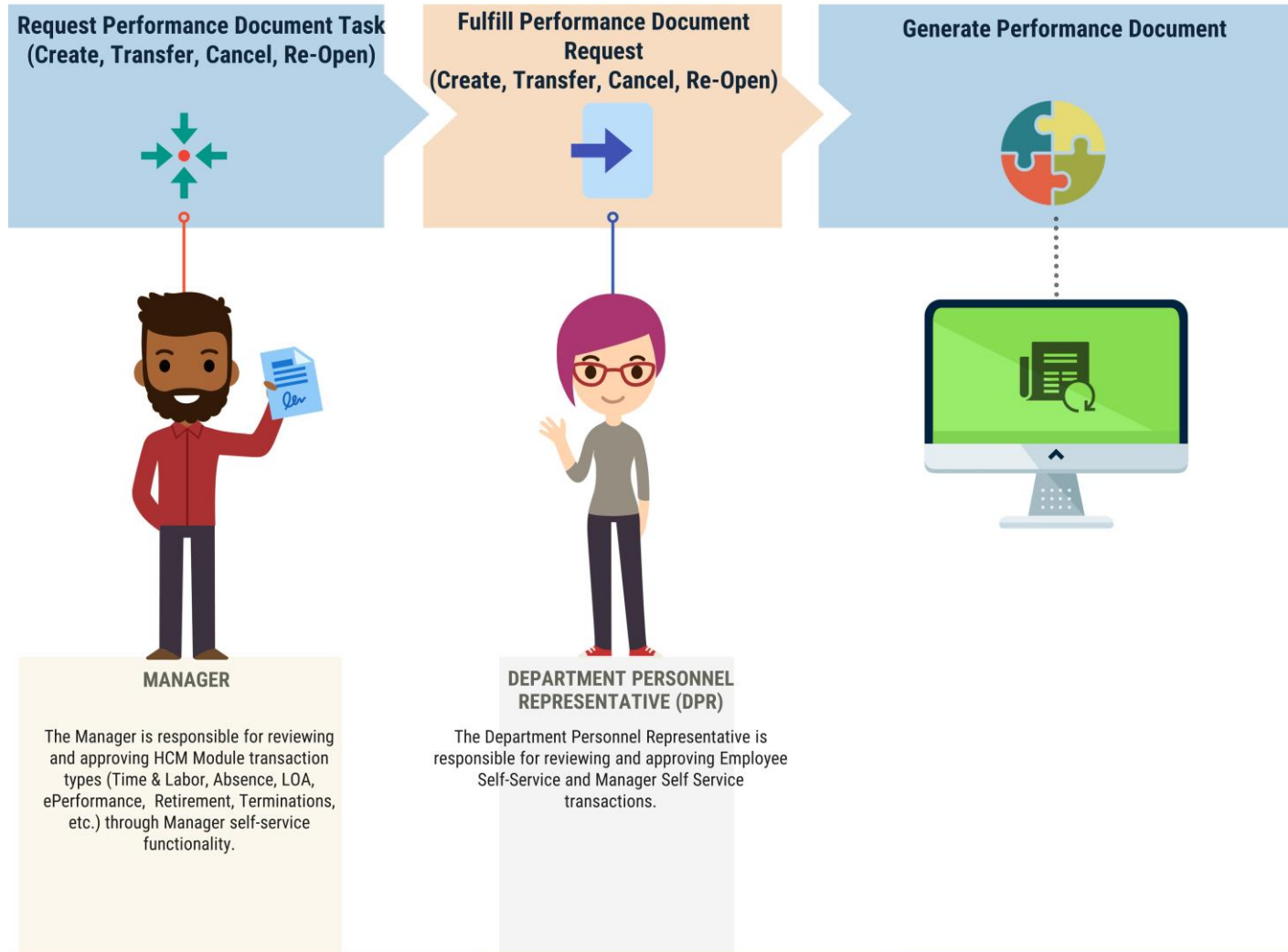
# Lesson 1: New Terms, Continued

Term	Definition
<b>Performance Improvement Plan (PIP)</b>	A performance document generated in INFORMS by the DPR at a Manager's request. Managers use PIPs to set specific performance goals/benchmarks to help improve their employee's performance when applicable.
<b>Create</b>	The process of generating an Employee's performance document.
<b>Transfer</b>	The process of re-assigning responsibility for an Employee's performance evaluation document from one Supervisor to another Supervisor within their Business Unit.
<b>Re-Open</b>	The process of re-opening a performance evaluation document's <b>Document Status</b> from "Completed" to "Evaluation In Progress".
<b>Cancel</b>	The process of updating a performance evaluation document's <b>Document Status</b> to "Cancelled". A Cancelled performance evaluation document is no longer visible to the Supervisor or the Employee.

# Lesson 1: Administrative Tasks

## PERFORMANCE ADMINISTRATION

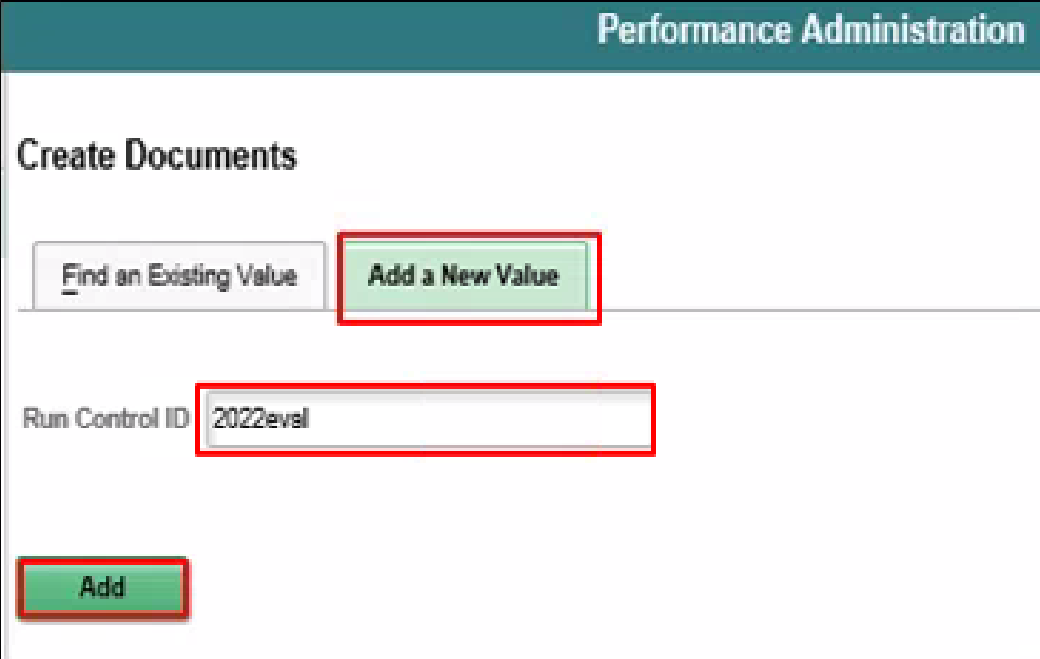
### BUSINESS PROCECSS



# Lecture 1: Manually Create Evaluation

Navigate to Performance Administration: **Human Resources (HCM) > Performance Administration > Performance Documents > Create Documents**

1. Select the **Add a New Value** tab.
2. Enter a name in the **Run Control ID** field
3. Select the **Add** Button.



The screenshot shows the 'Performance Administration' interface. At the top, there is a teal header with the text 'Performance Administration'. Below this, the page title is 'Create Documents'. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red border. Below the buttons, there is a text input field labeled 'Run Control ID' containing the text '2022eval', which is also highlighted with a red border. At the bottom left, there is a green 'Add' button, also highlighted with a red border.

# Lecture 1: Manually Create Evaluation Continued

4. Enter the date that the Employee's evaluation period began in the **Period Begin Date** field.
5. Enter the date that the Employee's evaluation period ended in the **Period End Date** field.

The screenshot displays the 'Performance Administration' interface for 'Create Documents'. The 'Run Request Parameters' section includes the following fields:

- Period Begin Date: 03/01/2022
- Period End Date: 03/01/2022
- Document Type: [Dropdown]
- Template ID: [Dropdown]
- Manager Selection Method: [Dropdown]

The 'Create Documents Using' section shows the 'Group ID' radio button selected.

The 'Documents Using Group ID' table is as follows:

*Group ID	As Of Date	Description	Language Code
1	03/20/2022		

# Lecture 1: Manually Create Evaluation Continued

6. Select the **Document Type** list and select the desired Performance Document.

The screenshot shows the 'Performance Administration' interface for 'Human Resources (HCM)'. The main heading is 'Create Documents'. Below this, there are fields for 'Run Control ID' (2022eval), 'Report Manager', and 'Process Monitor', along with a 'Run' button. The 'Run Request Parameters' section includes 'Period Begin Date' (03/01/2022), 'Period End Date' (03/01/2023), and 'Template ID'. The 'Document Type' dropdown menu is open, displaying a list of options: 'MDC Performance Improvement Pt', 'MDC SR MGT SA 2', 'MDC SR MANAGEMENT MX', 'MDC-Annual Review EE' (highlighted with a red box), 'MDC-Prof Supervisory Review ME', and 'MDC-Sr. Mgmt. Prof. SA Performance Document'. The left sidebar contains a 'Performance Documents' menu with options like 'Create Documents', 'Delete Document', 'Reopen Document', 'Transfer Document', 'Cancel Document', and 'Template Definition', and a 'Development Documents' menu.

# Lecture 1: Manually Create Evaluation Continued

7. Select the **Template ID** list and select the desired list item.

Performance Administration [New Window](#)

### Create Documents

Run Control ID: 2022eval [Report Manager](#) [Process Monitor](#)

#### Run Request Parameters

Period Begin Date	03/01/2022 <input type="button" value="Calendar"/>	Period End Date	03/01/2023 <input type="button" value="Calendar"/>
Document Type	MDC-Annual Review EE <input type="button" value="v"/>	Template ID	<div style="border: 1px solid black; padding: 2px;"><div style="background-color: #0070C0; color: white; padding: 2px;">Employee Performance Eval</div></div>
Manager Selection Method	<input type="button" value="v"/>		

# Lecture 1: Manually Create Evaluation Continued

8. Select the **Manager** list and select **By Part Posn Mgmt Supervisor**.

The screenshot shows the 'Create Documents' interface in the Performance Administration module. The left sidebar contains a navigation menu with 'Performance Documents' expanded, showing options like 'Create Documents', 'Delete Document', 'Reopen Document', 'Transfer Document', 'Cancel Document', and 'Template Definition'. The main area is titled 'Create Documents' and includes a 'Run Control ID' of '2022eval', a 'Report Manager' field, a 'Process Monitor' field, and a 'Run' button. Below this is the 'Run Request Parameters' section, which contains several input fields: 'Period Begin Date' (03/01/2022), 'Period End Date' (03/01/2023), 'Document Type' (MDC-Annual Review EE), and 'Template ID' (Employee Performance Eval). The 'Manager Selection Method' dropdown menu is open, displaying a list of options. The option 'By Part Posn Mgmt Supervisor' is highlighted with a red box. At the bottom, there are radio buttons for 'Group ID' (selected) and 'Employee ID'.



# Lecture 1: Manually Create Evaluation Continued

9. Select the **Employee ID** option.
10. Select the **Empl ID field**, then enter the Employee's ID.
11. Select the **Save** button.

Performance Administration

Run Control ID 2022eval Report Manager Process Monitor Run

**Run Request Parameters**

Period Begin Date 03/01/2022 Period End Date 03/01/2023

Document Type MDC-Annual Review EE Template ID Employee Performance Eval

Manager Selection Method By Part Posn Mgmt Supervisor

**Create Documents Using**

Group ID  Employee ID

**Documents Using Employee ID**

**Employees to Process**

*Empl ID	Empl Record	Name	Language Code
1 00310968	0	Tarnie Attaway	

Save Notify Add Update/Display

# Lecture 1: Manually Create Evaluation Continued

12. Select the **Run** button.

Performance Administration

Create Documents

Run Control ID: 2022eval

Report Manager Process Monitor **Run**

Run Request Parameters

Period Begin Date: 03/01/2022

Period End Date: 03/01/2023

Document Type: MDC-Annual Review EE

Template ID: Employee Performance Eval

Manager Selection Method: By Part Posn Mgmt Supervisor

13. Select the **OK** button.

Process Scheduler Request

User ID: T0140635 Run Control ID: 2022eval

Server Name: [Dropdown]

Run Date: 03/20/2022

Recurrence: [Dropdown]

Run Time: 6:42:45PM

Time Zone: [Dropdown]

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	-Type	-Format	Distribution
<input checked="" type="checkbox"/>	Mass Create Employee Documents	EP_MGRDOC	Application Engine	Web	TXT	Distribution

**OK** Cancel

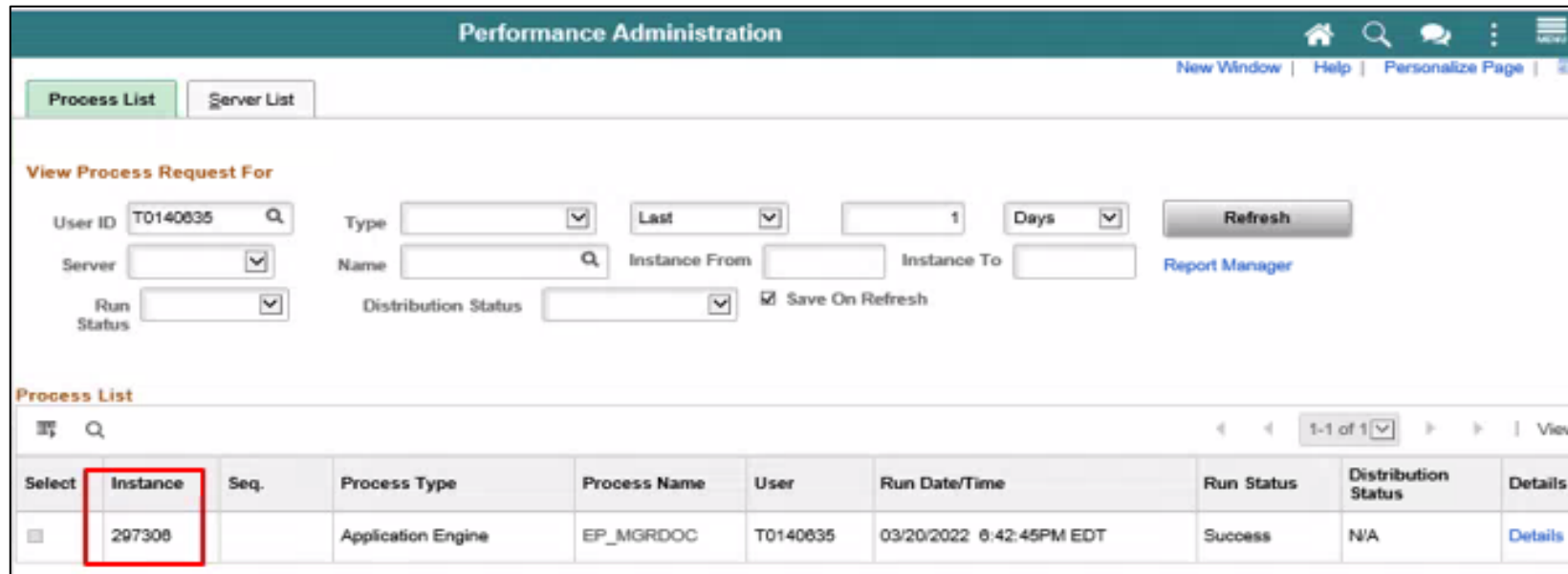
# Lecture 1: Manually Create Evaluation Continued

14. Note the **Process Instance** number, then select the **Process Monitor** link.



The screenshot shows the 'Performance Administration' interface. At the top, there is a header with 'Performance Administration' and a home icon. Below the header, there are links for 'New Window' and 'Help'. The main content area has a title 'Create Documents' and a 'Run Control ID' of '2022eval'. There are three buttons: 'Report Manager', 'Process Monitor' (highlighted with a red box), and 'Run'. Below the 'Process Monitor' button, the text 'Process Instance: 297308' is displayed and also highlighted with a red box.

15. Recall the **Process Instance** number in order to identify the correct row.



The screenshot shows the 'Performance Administration' interface with the 'Process List' tab selected. The 'View Process Request For' section contains various filters: User ID (T0140835), Type, Last, Days (1), Name, Instance From, Instance To, Run Status, Distribution Status, and a 'Save On Refresh' checkbox. A 'Refresh' button and 'Report Manager' link are also present. Below the filters is a 'Process List' table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	297308		Application Engine	EP_MGRDOC	T0140835	03/20/2022 6:42:45PM EDT	Success	N/A	<a href="#">Details</a>

# Lecture 1: Manually Create Evaluation Continued

16. Select the **Refresh** button.

17. Repeat the previous step occasionally until **Distribution Status** displays "Posted".

The screenshot shows the Performance Administration interface. At the top, there is a header with the title "Performance Administration" and navigation icons. Below the header, there are tabs for "Process List" and "Server List". The main area contains a form for "View Process Request For" with fields for User ID (T0140035), Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A "Refresh" button is highlighted with a red box. Below the form, there is a "Process List" table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with Instance 297300, Process Type Application Engine, Process Name EP\_MGRDOC, User T0140035, Run Date/Time 03/20/2022 6:42:46PM EDT, Run Status Success, and Distribution Status Posted. The "Distribution Status" column and the value "Posted" are highlighted with a red box.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	297300		Application Engine	EP_MGRDOC	T0140035	03/20/2022 6:42:46PM EDT	Success	Posted	<a href="#">Details</a>

# Lecture 2: Cancel Evaluation

Navigate to Performance Administration: **Human Resources (HCM) > Performance Administration > Performance Documents > Cancel Document**

1. Enter the **Manager's First Name** of the Manager who requested the cancellation.
2. Enter the **Last Name** of the Manager who requested the cancellation.
3. Select the **Search** button.

**Performance Administration**

### Cancel Document

To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be canceled except for already "Canceled" performance documents.

Search for Documents

First Name	<input type="text"/>	Last Name	<input type="text"/>
Manager First Name	<input type="text" value="MICHAEL"/>	Manager Last Name	<input type="text" value="KRUG"/>
Document Type	<input type="text"/>	Document Status	<input type="text"/>
Period Between	<input type="text"/>	Employee	<input type="text"/>

# Lecture 2: Cancel Evaluation Continued

4. Find and select the desired Evaluation row option.
5. Scroll down (if necessary) and select the **Continue** button

<input type="checkbox"/>	00016302	Paola Strange	MDC-Prof/Supervisory Review ME	Completed	09/11/2017	09/09/2018	Assistant Tax Collector	Lavonda Holloman
<input type="checkbox"/>	00016302	Paola Strange	MDC-Prof/Supervisory Review ME	Completed	09/12/2016	09/10/2017	Assistant Tax Collector	Lavonda Holloman
<input checked="" type="checkbox"/>	00323913	Sasha Osborn	MDC-Prof/Supervisory Review ME	Completed	07/15/2019	07/12/2020	Administrative Officer 2	Lavonda Holloman
<input type="checkbox"/>	00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Intl Enterprise Portfolio Mgr	Lavonda Holloman
<input type="checkbox"/>	00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	12/18/2017	12/16/2018	Intl Enterprise Portfolio Mgr	Lavonda Holloman
<input type="checkbox"/>	00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	12/19/2016	12/17/2017	Intl Enterprise Portfolio Mgr	Lavonda Holloman
<input type="checkbox"/>	00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	12/21/2015	12/18/2016	Intl Enterprise Portfolio Mgr	Lavonda Holloman
<input type="checkbox"/>	00211062	Tran Samples	MDC-Prof/Supervisory Review ME	Completed	06/01/2010	05/31/2011	Intl Enterprise Portfolio Mgr	Michael Krug
<input type="checkbox"/>	00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	05/20/2019	05/17/2020	Erp Project Manager	Lavonda Holloman
<input type="checkbox"/>	00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	11/01/2010	10/30/2011	Erp Project Manager	Michael Krug
<input type="checkbox"/>	00208815	Tristan Urena	MDC-Prof/Supervisory Review ME	Completed	11/02/2009	10/31/2010	Erp Project Manager	Michael Krug

Select All      Deselect All

**Continue**

# Lecture 2: Cancel Evaluation Continued

6. Select the **Save** button.



Performance Administration

Cancel Document

Confirm Cancellation

Performance Documents

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
00015270	Bady Jamieson	MDC-Prof/Supervisory Review ME	Completed	11/16/2009	11/14/2010	Erp Senior Developer	Michael Krug

You have chosen to cancel the performance documents listed. To confirm this cancellation, select the **save** button.

**Save** [Return to Previous Page](#)

7. Select the **OK** button.



Performance Administration

Cancel Document

Save Confirmation

✓ The Save was successful.

**OK**

# Lecture 3: Transfer Evaluation

Navigate to Performance Administration: **Human Resources (HCM) > Performance Administration > Performance Documents > Transfer Document**

1. Select the **Document Status** list.
2. Select the **Evaluation in Progress** list item.
3. Select the **Search** button.

The screenshot shows the 'Transfer Document' page in the Performance Administration system. The page title is 'Performance Administration' and the breadcrumb trail is 'Human Resources (HCM) > Performance Administration > Performance Documents > Transfer Document'. The left sidebar contains a navigation menu with 'Performance Documents' expanded, showing options like 'Create Documents', 'Reopen Document', 'Transfer Document' (highlighted), and 'Cancel Document'. Below this are 'Development Documents' and 'Profiles'. The main content area has a heading 'Transfer Document' and a sub-heading 'Search for Documents'. It contains a search form with fields for 'First Name', 'Last Name', 'Manager First Name', 'Last Name', 'Document Type', 'Document Status', and 'Period Between'. The 'Document Status' dropdown menu is open, showing a list of status options: 'Acknowledged', 'Approval', 'Canceled', 'Completed', 'Define Criteria', 'Evaluation in Progress' (highlighted with a red box), 'Not started', 'Pending Acknowledgement', 'Shared with Employee', and 'Track Progress'. A 'Search' button is highlighted with a red box at the bottom left of the search form.



# Lecture 3: Transfer Evaluation Continued

4. Select the desired Employee ID's **option**.
5. Note the name displayed in the Manager field.
6. Select the **Continue** button.

**Performance Documents**

☰ 🔍 1-2 of 2

	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input checked="" type="checkbox"/>	00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Christina Kocher
<input type="checkbox"/>	00319256	Les Chatham	MDC-Annual Review EE	Evaluation in Progress	01/01/2021	01/01/2022	Accountant 2	Noemi Brockway

Select All      Deselect All

**Continue**

# Lecture 3: Transfer Evaluation Continued

7. Select the **Select a Manager** link.

Human Resources (HCM) Performance Administration

Transfer Document  
Confirm Transfer

Performance Documents

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Christina Kocher

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the Save button to complete the transfer.

New Manager ID:  [Select a Manager](#)

[Save](#) [Return to Previous Page](#)

8. Select in the Manager's **Last Name** in the **Last Name** field

9. Select the **Search** button.

Search Criteria

Name

Last Name

Second Last Name

First Name

ACName

[Search](#)

[Return to Previous Page](#)

# Lecture 3: Transfer Evaluation Continued

10. Select the desired option.

11. Select the **OK** button.

**Search Results**

<input type="radio"/>	Domitila Stocker	<a href="#">i</a>
<input checked="" type="radio"/>	Kilvondra Stocker	<a href="#">i</a>
<input type="radio"/>	Ron Lee Stocker	<a href="#">i</a>
<input type="radio"/>	Vangie Stocker	<a href="#">i</a>

**OK**

[Return to Previous Page](#)

12. Select the **Save** option.

**Performance Administration**

**Transfer Document**

**Confirm Transfer**

**Performance Documents**

Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Christina Kocher

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the "Save" button to complete the transfer.

New Manager ID: [Kilvondra Stocker](#)  
[Select a Manager](#)

**Save**

[Return to Previous Page](#)

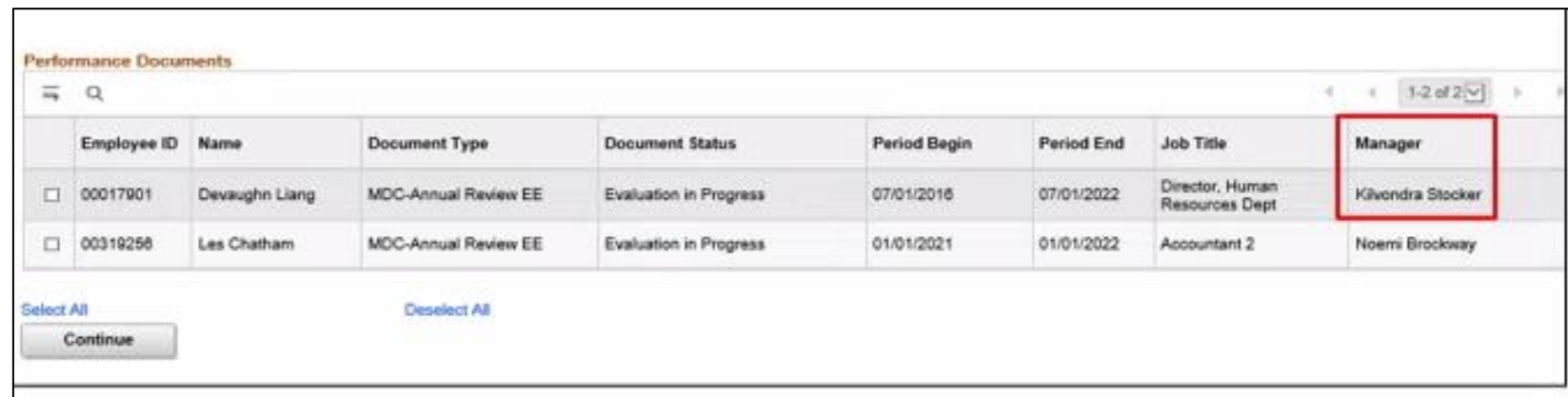
# Lecture 3: Transfer Evaluation Continued

13. Select the **OK** button.



The image shows a dialog box titled "Performance Administration". Inside the dialog, the text "Transfer Document" is followed by "Save Confirmation". Below this, there is a checkmark icon and the text "The Save was successful.". At the bottom of the dialog, there is a button labeled "OK" which is highlighted with a red rectangular border.

Note that the **Manager** field displays the name of the Manager that the Performance Management document was transferred to. This validates that the Transfer was successful.



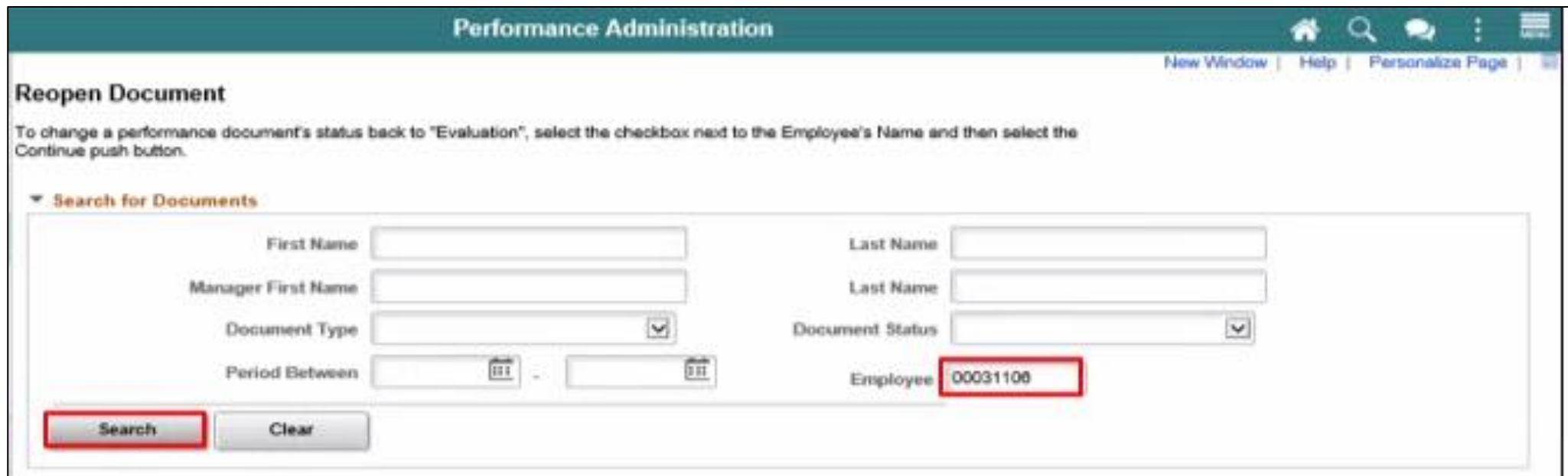
The image shows a table titled "Performance Documents". The table has columns for Employee ID, Name, Document Type, Document Status, Period Begin, Period End, Job Title, and Manager. The Manager column is highlighted with a red rectangular border. Below the table, there are links for "Select All" and "Deselect All", and a "Continue" button.

	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input type="checkbox"/>	00017901	Devaughn Liang	MDC-Annual Review EE	Evaluation in Progress	07/01/2016	07/01/2022	Director, Human Resources Dept	Klyvondra Stocker
<input type="checkbox"/>	00319256	Les Chatham	MDC-Annual Review EE	Evaluation in Progress	01/01/2021	01/01/2022	Accountant 2	Noemi Brockway

# Lecture 4: Re-Open Evaluation

Navigate to Performance Administration: **Human Resources (HCM) > Performance Administration > Performance Documents > Reopen Documents**

1. Select the **Employee** field.
2. Enter the Employee's Employee Number into the **Employee** field.
3. Select the **Search** button.



Performance Administration

New Window | Help | Personalize Page |

### Reopen Document

To change a performance document's status back to "Evaluation", select the checkbox next to the Employee's Name and then select the Continue push button.

▼ Search for Documents

First Name	<input type="text"/>	Last Name	<input type="text"/>
Manager First Name	<input type="text"/>	Last Name	<input type="text"/>
Document Type	<input type="text" value=""/>	Document Status	<input type="text" value=""/>
Period Between	<input type="text" value=""/> - <input type="text" value=""/>	Employee	<input type="text" value="00031100"/>

# Lecture 4: Re-Open Evaluation Continued

4. Note that four evaluation documents for this Employee display a **Document Status** of “Completed”. These four evaluation documents are closed.
5. Select the evaluation to be re-opened.
6. Select the **Continue** button.

Performance Documents

	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
<input type="checkbox"/>	00031106	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Computer Technician 2
<input type="checkbox"/>	00031106	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Computer Technician 2
<input type="checkbox"/>	00031106	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/12/2018	03/10/2019	Computer Technician 2
<input checked="" type="checkbox"/>	00031106	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/13/2017	03/11/2018	Computer Technician 2

Select All      Deselect All

**Continue**

# Lecture 4: Re-Open Evaluation Continued

7. Select the **OK** button.



Note: The performance evaluation document has now been re-opened.

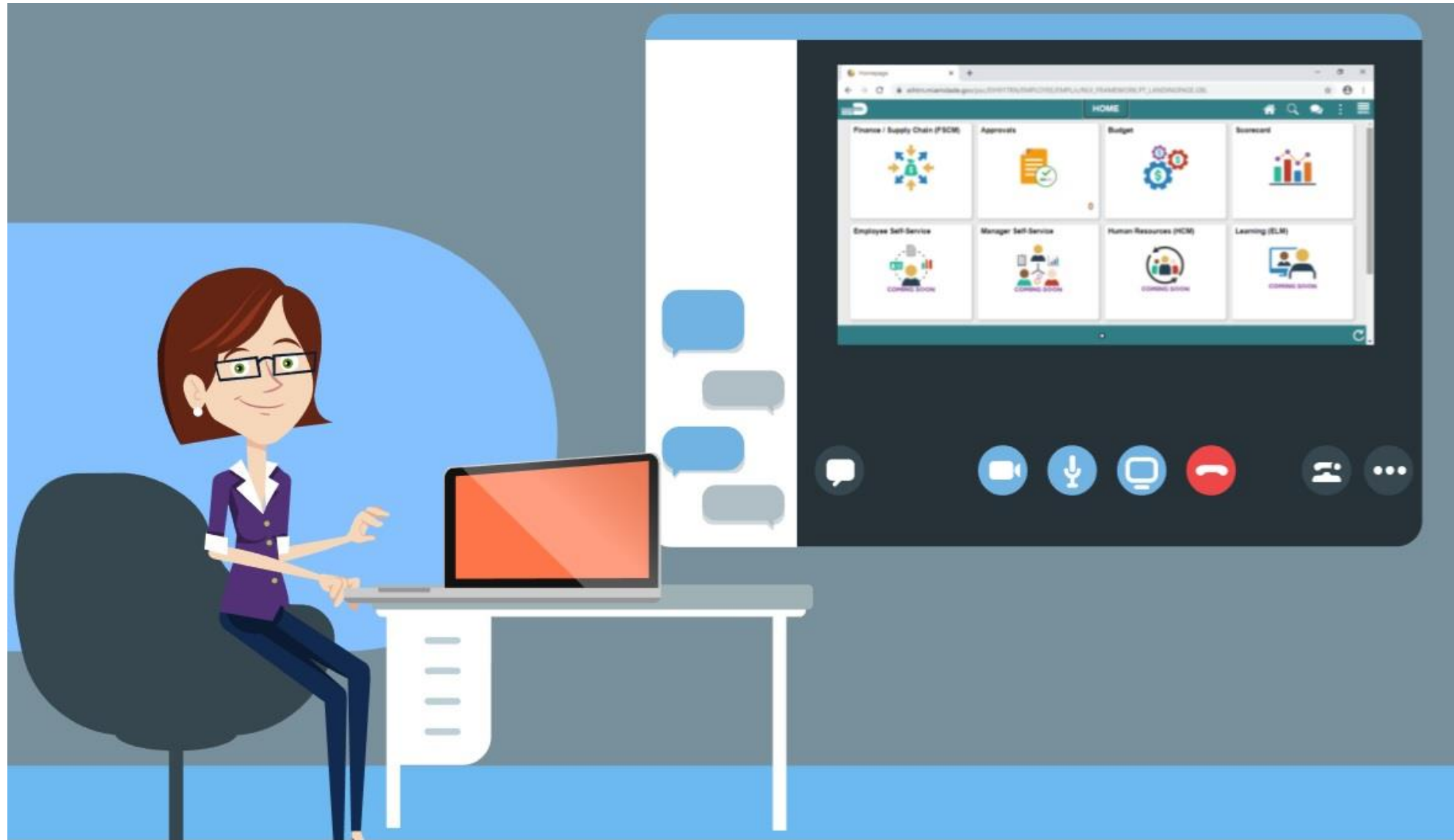
8. Earlier, the search returned four Evaluations. Note that only three Evaluations now display a **Document Status** of “Completed”.

Performance Documents

	Employee ID	Name	Document Type	Document Status	Period Begin	Period End	Job Title
<input type="checkbox"/>	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/23/2019	09/20/2020	Computer Technician 2
<input type="checkbox"/>	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	09/24/2018	09/22/2019	Computer Technician 2
<input type="checkbox"/>	00031108	Adeline Gonzalez	MDC-Prof/Supervisory Review ME	Completed	03/12/2018	03/10/2019	Computer Technician 2

Select All      Deselect All  
Continue

# Lesson 1: Activities and Exercises





# Lesson 1: Lesson Summary

You have now learned how to perform the following Administrative

Tasks in INFORMS:

- Manually Create Evaluations
- Cancel Evaluations
- Transfer Evaluations
- Re-Open Evaluations

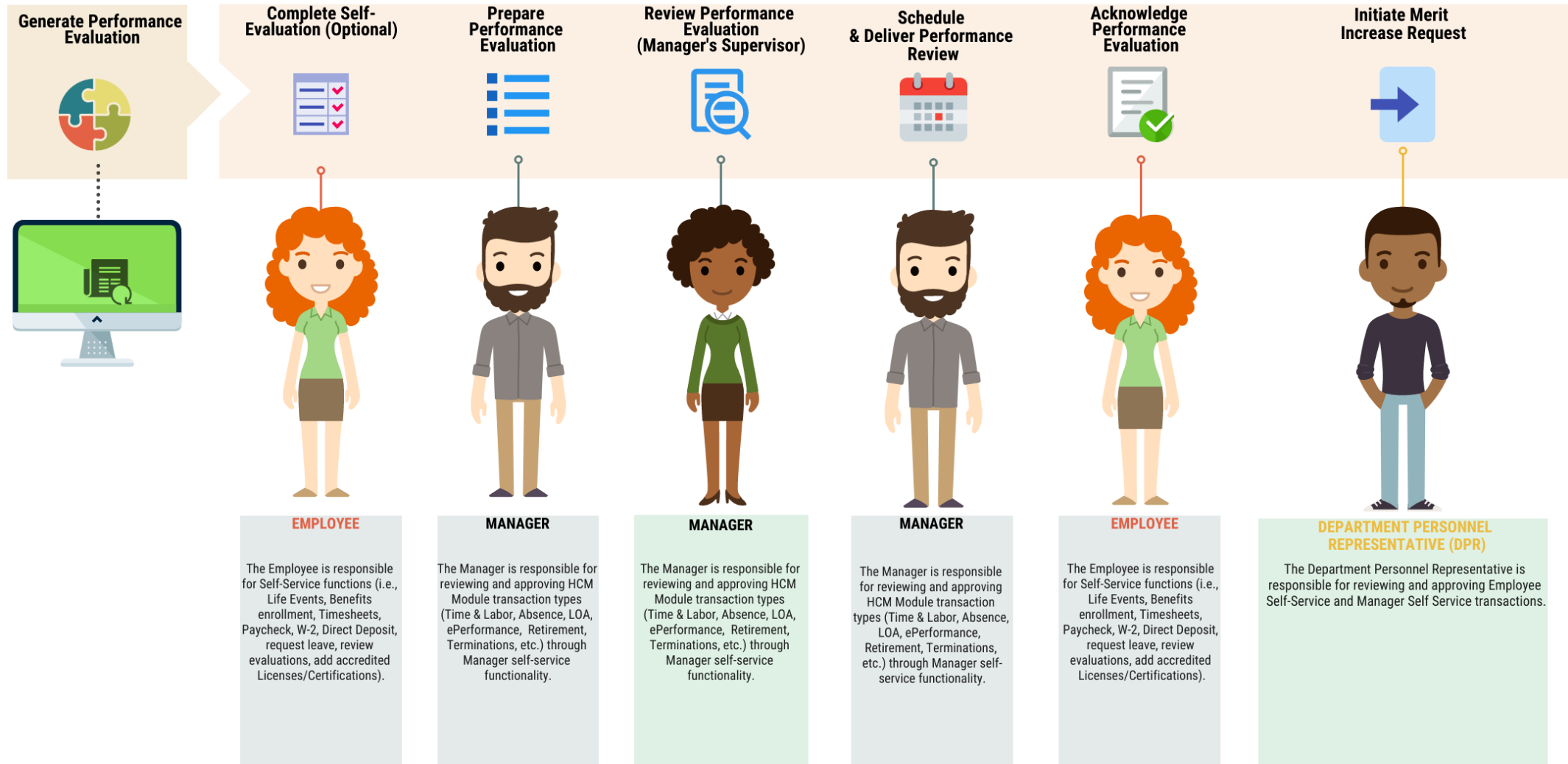
# Lesson 2: Completing Evaluation

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

- Complete an Evaluation

# Lesson 2: Completing Evaluation (Continued)

## PERFORMANCE REVIEW BUSINESS PROCESS



# Lesson 2: Key Terms

Term	Definition
<b>Merit Increase</b>	A <b>base</b> salary increase that Employees may be eligible for if their Overall Rating is “Satisfactory” (or above) based on their salary plan.
<b>Overall Rating</b>	The average of the Individual Ratings on an Employee's performance evaluation.
<b>Performance Evaluation</b>	An annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for the employee performance- based <i>Merit</i> Increase.

# Lesson 2: Completing Evaluations (Continued)

DPRs perform the following Performance Evaluation activities in INFORMS:

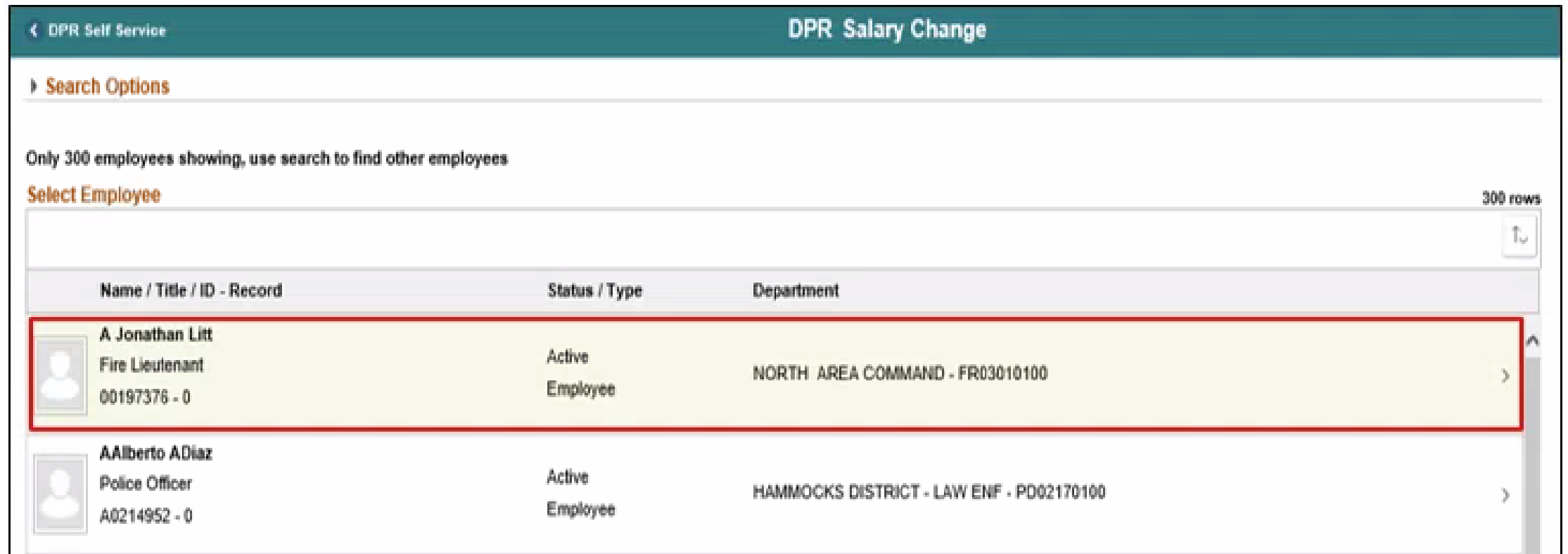
- Initiate the Merit Increase process (if applicable)

DPR use INFORMS' Salary Change tool to initiate a merit increase percentage or to move to the next Step.



# Lecture 1: Complete Evaluation

Navigate to DPR Self Service: **HOME > DPR Self Service > DPR Salary Change**

1. Select the Row for the desired Employee.



The screenshot shows the 'DPR Salary Change' interface. At the top, there is a navigation bar with a back arrow and 'DPR Self Service' on the left, and 'DPR Salary Change' on the right. Below this is a 'Search Options' section. A message states 'Only 300 employees showing, use search to find other employees'. The main section is titled 'Select Employee' and shows a table with 300 rows. The first row is highlighted with a red border. The table has three columns: 'Name / Title / ID - Record', 'Status / Type', and 'Department'. The first row contains the following data: A Jonathan Litt (Fire Lieutenant, 00197376 - 0), Active Employee, and NORTH AREA COMMAND - FR03010100. The second row contains: AAAlberto ADiaz (Police Officer, A0214952 - 0), Active Employee, and HAMMOCKS DISTRICT - LAW ENF - PD02170100.

Name / Title / ID - Record	Status / Type	Department
 A Jonathan Litt Fire Lieutenant 00197376 - 0	Active Employee	NORTH AREA COMMAND - FR03010100
 AAAlberto ADiaz Police Officer A0214952 - 0	Active Employee	HAMMOCKS DISTRICT - LAW ENF - PD02170100

# Lecture 1: Complete Evaluation Continued

2. Validate the **Transaction Date** of the salary increase request.
3. Select the **Merit** list item in the **Reason** list.
4. Enter the desired percentage into the **Change Percent** field.
5. Press the “Tab” key on your keyboard to refresh the compensation calculations.

The screenshot displays the 'DPR Salary Change' interface for user A Jonathan Litt, Fire Lieutenant. The process is in the 'MD Compensation Detail' step (1), with 'MD Review & Submit' (2) as the next step. A 'Next' button is visible in the top right.

**Compensation Details**

\*Transaction Date: 01/03/2022  
\*Reason: Merit

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Education Incentive Pay			198.07	198.07	USD	Flat Amount	Biweekly
Fire - B. A.			50.77	50.77	USD	Flat Amount	Biweekly
Fire Paramedic (Protocol Cert)			24.000	24.000	%	Percent	Biweekly
Fire Hazardous			125.00	125.00	USD	Flat Amount	Biweekly
MDC Biweekly	5		4,248.78	4,248.78	USD	Flat Amount	Biweekly

# Lecture 1: Complete Evaluation Continued

6. Select the **Calculate Compensation** button.
7. Select the **Next** button.

**DPR Salary Change**

Progress: 1 (MD Compensation Detail) / 2 (MD Review & Submit)

**Next >**

**Salary Plan**

Salary Admin Plan: STEP      Step

Salary Grade: 345      345

Grade Entry Date: 09/27/2006

Step: 11

Step Entry Date: 02/19/2021

**Default Pay Components**

Pay Components (5 rows)

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 CRDV2	0	18.46	USD	B		
2 FDLE	0	184.27	USD	B	5.500	MDCMAX
3 FRPBA	0	167.52	USD	B	5.000	MDCMAX
4 MDBKLY	0	3,058.50	USD	B		
5 NGT2	0	291.84	USD	B		

**Calculate Compensation**



# Lecture 1: Complete Evaluation Continued

8. Enter a comment in the **Comments** field.
9. Select the **Submit** button.

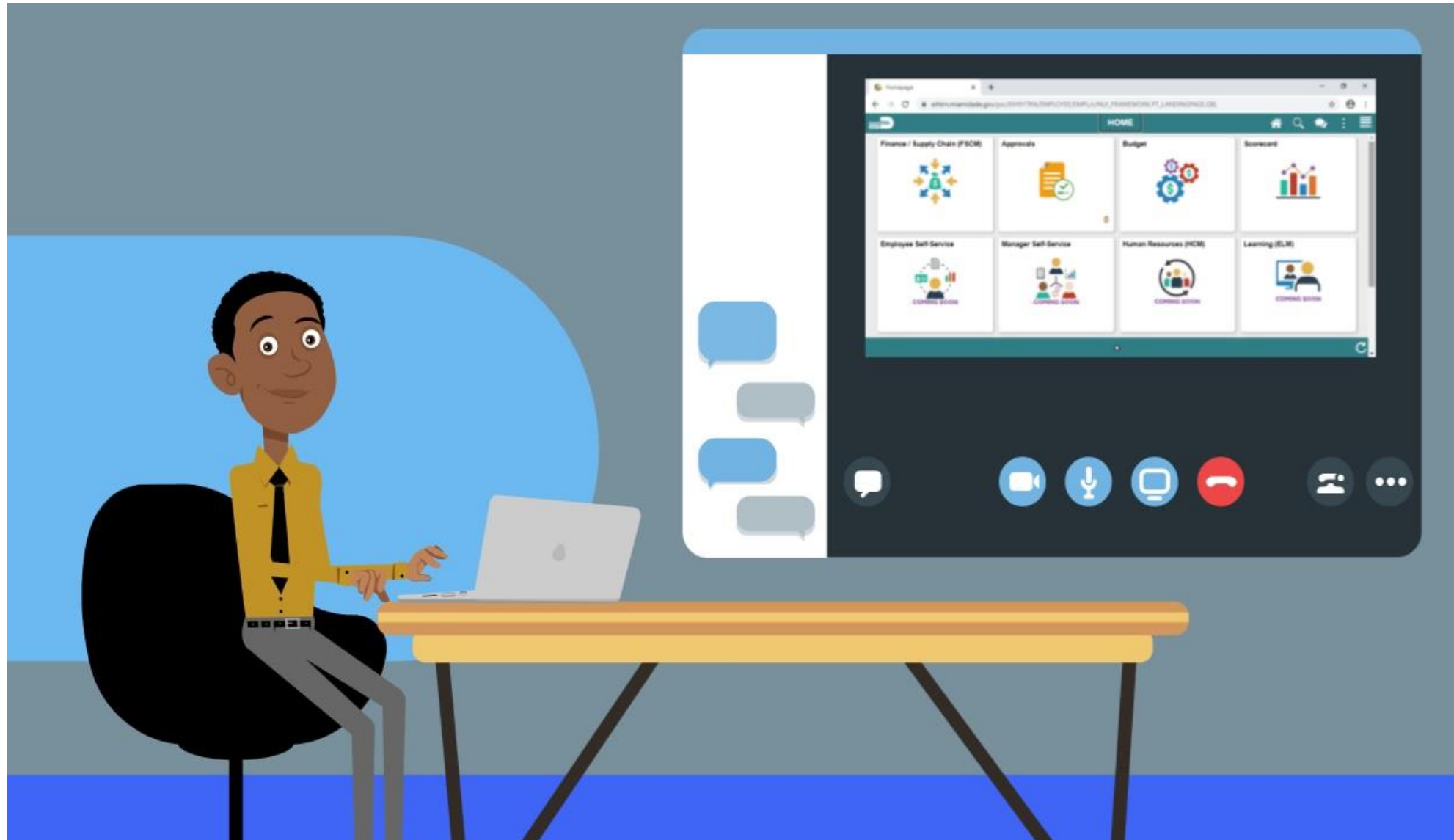
The screenshot shows the 'DPR Salary Change' interface for Jonathan Litt, Fire Lieutenant. The process is in step 2, 'MD Review & Submit', which is highlighted with a green circle. Step 1, 'MD Compensation Detail', is also visible. A 'Submit' button is highlighted with a red box. Below the navigation, the 'Review and Submit' section displays transaction details: Transaction Date 01/03/2022, Reason Merit. A comparison table shows 'New Information' (Biweekly Salary 3,720.59 USD, Annual Rate 96,735.31 USD) and 'Current Information' (Biweekly Salary 3,559.65 USD, Annual Rate 92,550.99 USD). A 'Comments' section at the bottom contains a text area with a red border containing the text: 'This Employee has acknowledged their performance review document. The Employee qualifies for a Merit increase.'

	New Information	Current Information
Biweekly Salary	3,720.59 USD	3,559.65 USD
Annual Rate	96,735.31 USD	92,550.99 USD

Comments

This Employee has acknowledged their performance review document. The Employee qualifies for a Merit increase.

# Lesson 2: Activities and Exercises



# Lesson 2: Lesson Summary

You have now learned how to:

- Complete a Performance Evaluation in INFORMS

# Lesson 3: Reports and Queries

At the conclusion of this lesson, participants will:

- Understand the list of INFORMS reports used by DPRs

# Lesson 3: Reports and Queries (continued)

## Late Evaluations Report

This report documents employee performance evaluation information including days evaluation is overdue.

# Lesson 3: Reports and Queries (continued)

## **Performance Evaluation Completed for Merit Increase Due**

This report helps DPRs determine which completed evaluations are eligible for a merit increase.

# Lesson 3: Lesson Summary

You have now learned about Performance Reporting capabilities in

INFORMS:

- Late Evaluations
- Performance Evaluation Completed for Merit Increase Due

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary



# Course Content Summary

Congratulations on completing the ePerformance Management.

You now understand:

- Administrative Tasks (Manually creating documents, Canceling Evaluations, Transferring Evaluations, Re-opening Evaluations)
- Completing evaluation as a DPR (Initiate a Merit Increase)
- Performance Reporting (Late Evaluations, Merit Increase)

For more information on INFORMS, please visit [www.miamidade.gov/informs](http://www.miamidade.gov/informs)

# Additional Training and Job Aids

Users may be eligible to take the following training courses based on their INFORMS roles:

- Time Management
- Personnel Changes
- Recruitment
- Updating Team Information

For additional information, be sure to visit:

[www.miamidade.gov/informs](http://www.miamidade.gov/informs)



# CONGRATULATIONS

Congratulations on successfully completing the **ePerformance Management** course!

**DPR 302 – Departmental HR - ePerformance Management (Employee Performance Evaluation)**