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

Ground Rules

Be on time

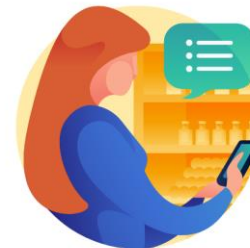Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed

Feel free to ask questions

Course Overview

Course Description	This course provides a comprehensive review of the ePerformance processes.
	This course consists of the following modules:
	- Module 1: Course Introduction - Module 2: ePerformance - Administrative Tasks - Completing evaluation - Reports and Queries - Module 3: Course Summary
Training Audiences	Department Personnel Representatives (DPRs)
Prerequisites	- ERP 101 – Overview of INFORMS - ERP 102 – INFORMS Navigation, Reporting, and Online Help - HR 101 – Human Resources Fundamentals

MIAMI-DADE COUNTY

Course Overview, Continued

Other Related Courses	Participants can attend the other related courses to Departmental HR: • DPR 302 – Departmental HR - Personnel Changes • DPR 303 – Departmental HR - Time Management • DPR 304 – Departmental HR - Updating Team Information • DPR 321 – Departmental HR - Recruitment
Estimated Duration	• 5 hours

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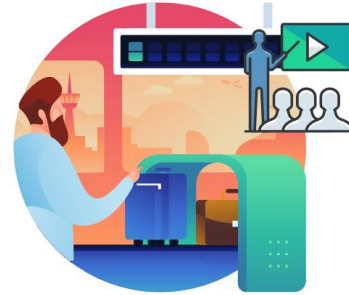
Please turn off your cell phones and refrain from checking email and the Internet while in class

Actively participate in class

Take Breaks at scheduled times

Ask questions; this is your time to learn

Be back from Breaks on time

MIAMI-DADE COUNTY

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
Department Personnel Representative (DPR)	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.
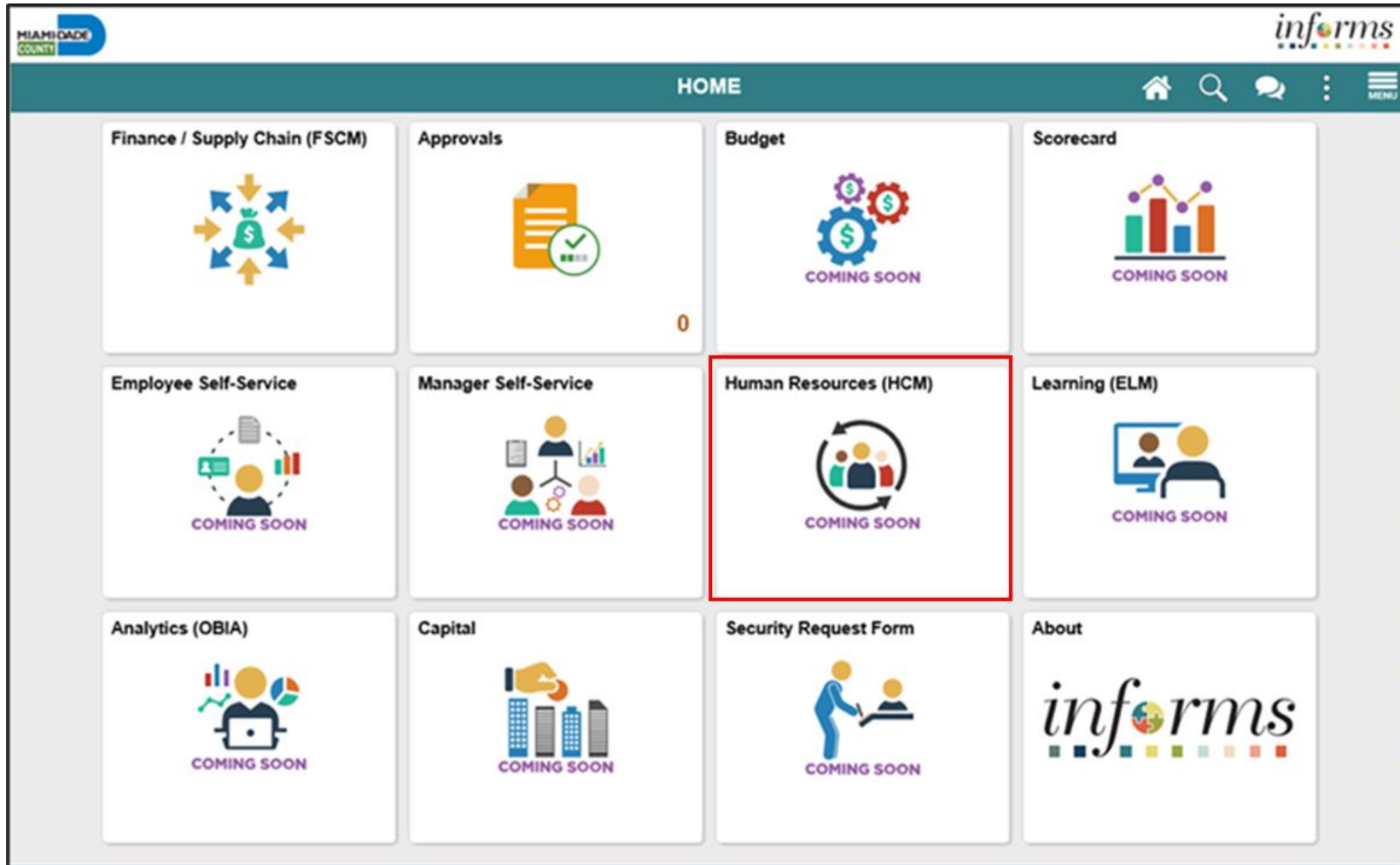
Purpose and Benefits to Business Process

- 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
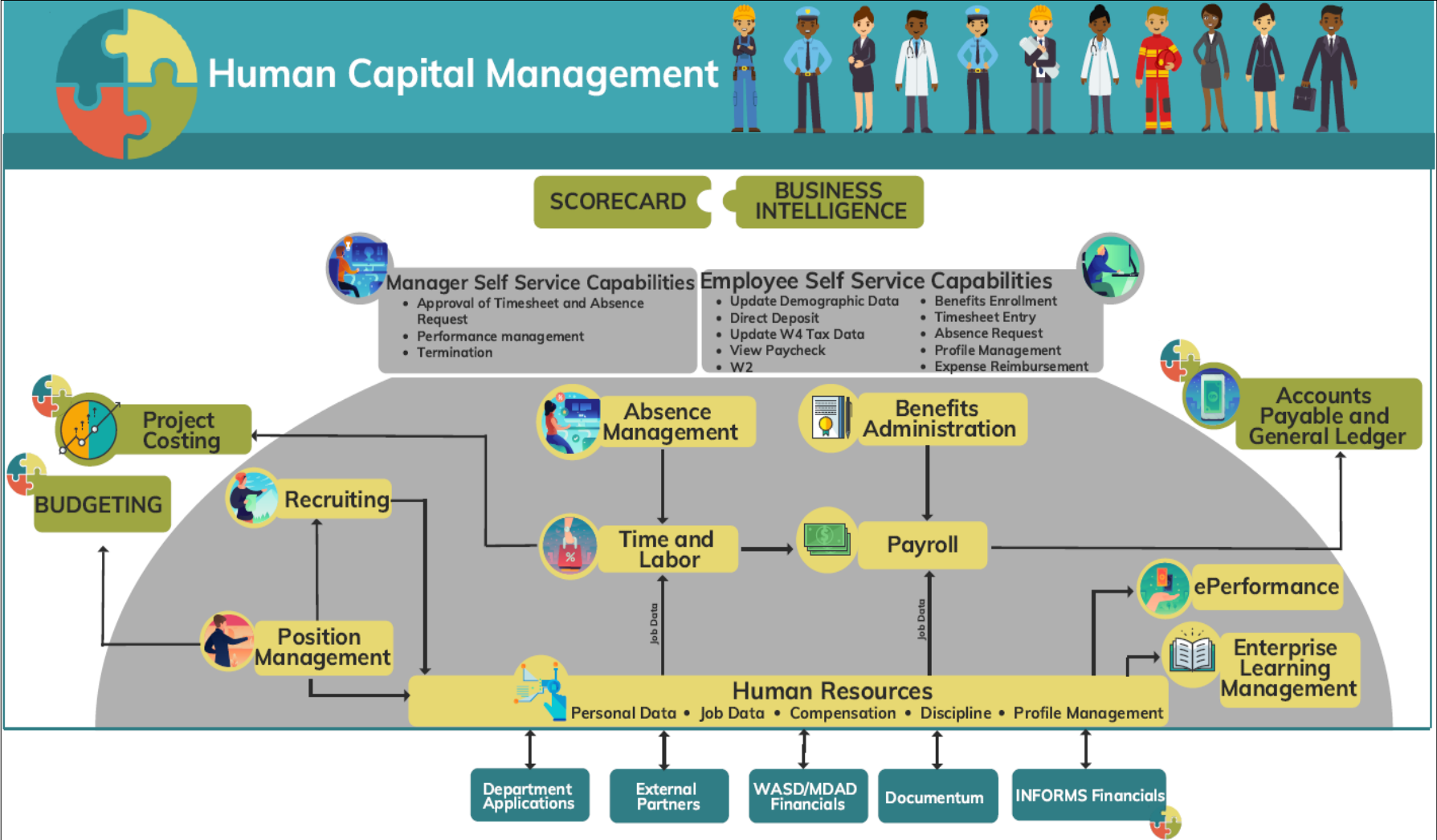
Introduction to Activities and Exercises

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

Training
Activities
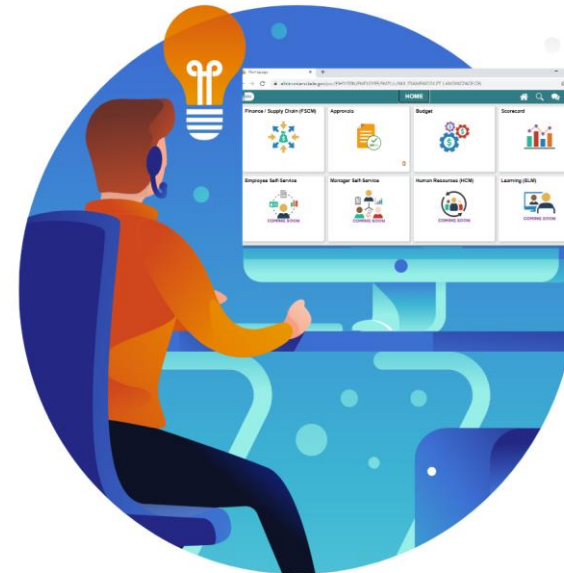
Training
Exercises

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

Lesson 1: New Terms, Continued

Term	Definition
Performance Improvement Plan (PIP)	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.
Create	The process of generating an Employee's performance document.
Transfer	The process of re-assigning responsibility for an Employee's performance evaluation document from one Supervisor to another Supervisor within their Business Unit.
Re-Open	The process of re-opening a performance evaluation document's **Document Status** from "Completed" to "Evaluation In Progress".
Cancel	The process of updating a performance evaluation document's **Document Status** 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

Request Performance Document Task
(Create, Transfer, Cancel, Re-Open)

Fulfill Performance Document Request
(Create, Transfer, Cancel, Re-Open)

Generate Performance Document

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.

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.

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.

Lecture 1: Manually Create Evaluation Continued

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

Lecture 1: Manually Create Evaluation Continued

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

Lecture 1: Manually Create Evaluation Continued

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

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.

Lecture 1: Manually Create Evaluation Continued

12. Select the **Run** button.

13. Select the **OK** button.
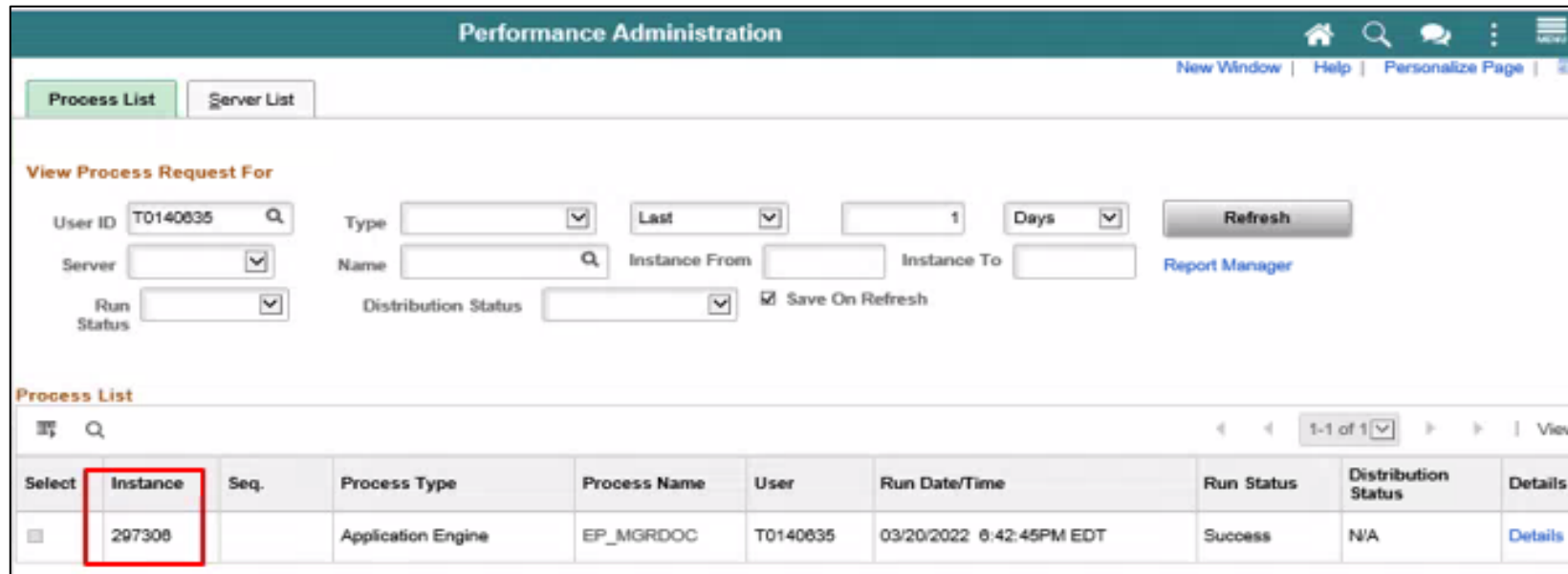
Lecture 1: Manually Create Evaluation Continued

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

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

Lecture 1: Manually Create Evaluation Continued

16. Select the **Refresh** button.
17. Repeat the previous step occasionally until **Distribution Status** displays "Posted".

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.

Lecture 2: Cancel Evaluation Continued

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

Lecture 2: Cancel Evaluation Continued

6. Select the **Save** button.

7. Select the **OK** button.

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.

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.

Lecture 3: Transfer Evaluation Continued

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

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

Lecture 3: Transfer Evaluation Continued

10. Select the desired option.
11. Select the **OK** button.

12. Select the **Save** option.

Lecture 3: Transfer Evaluation Continued

13. Select the **OK** button.

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.

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.

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.

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

Performance Documents

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".

Lesson 1: Activities and Exercises
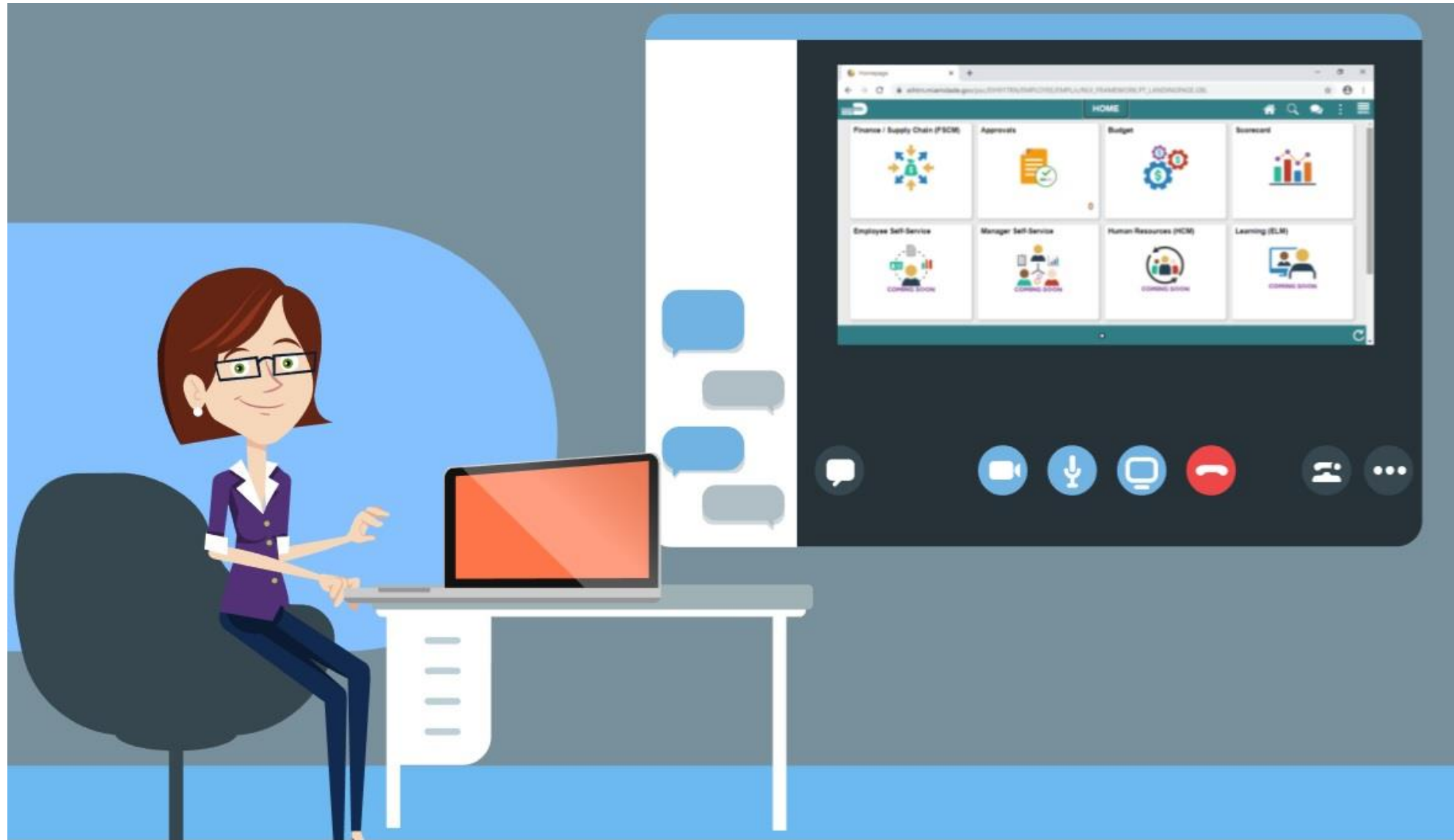
Lesson 1: Lesson Summary

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

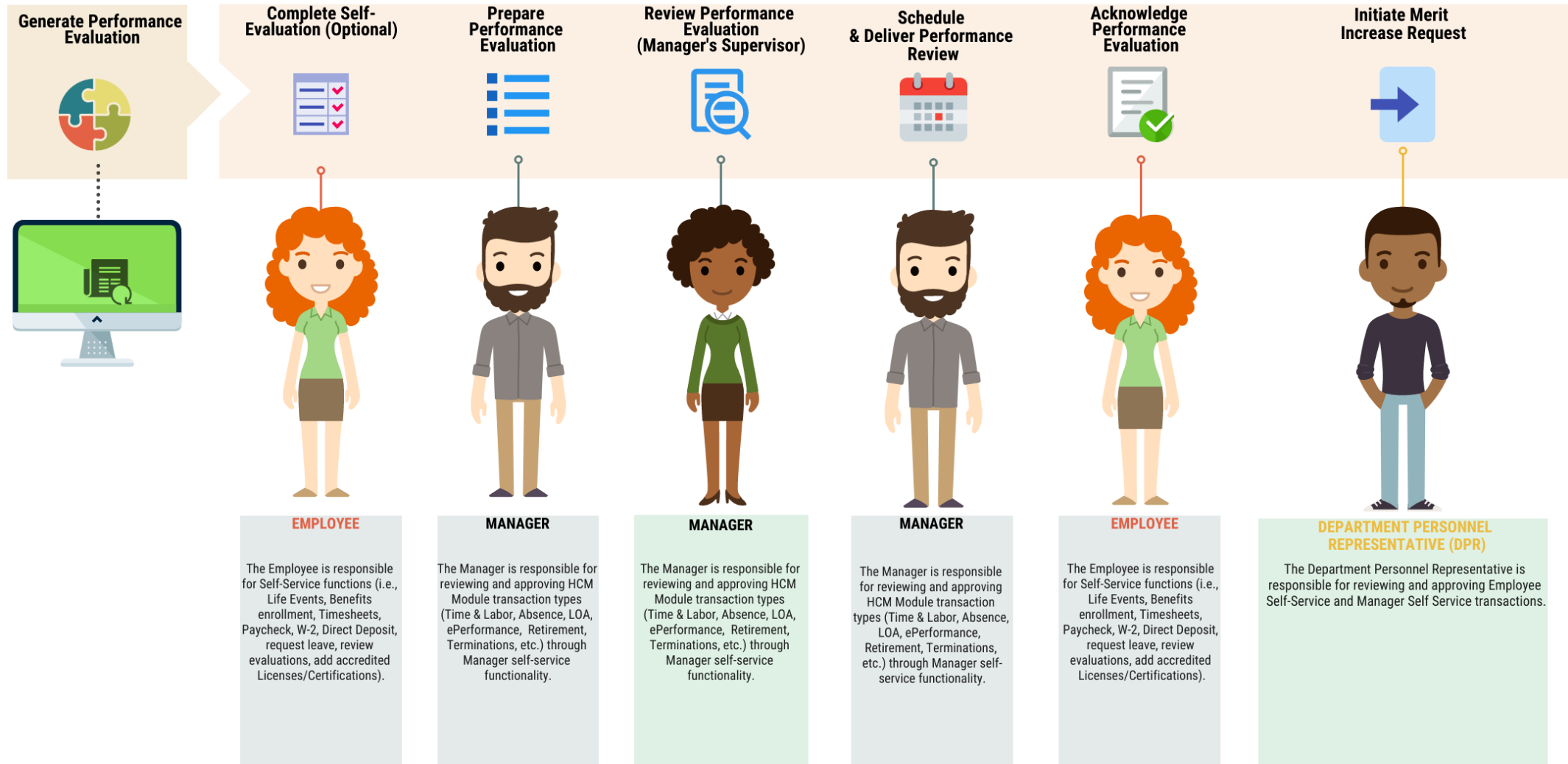| Generate Performance Evaluation	Complete Self-Evaluation (Optional)	Prepare Performance Evaluation	Review Performance Evaluation (Manager's Supervisor)	Schedule & Deliver Performance Review	Acknowledge Performance Evaluation	Initiate Merit Increase Request
	EMPLOYEE	**MANAGER**	**MANAGER**	**MANAGER**	**EMPLOYEE**	**DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)**
	The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).	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.	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.	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.	The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Lesson 2: Key Terms

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

Lesson 2: Completing Evaluations (Continued)

DPRs perform the following Performance Evaluation activities in INFORMS:
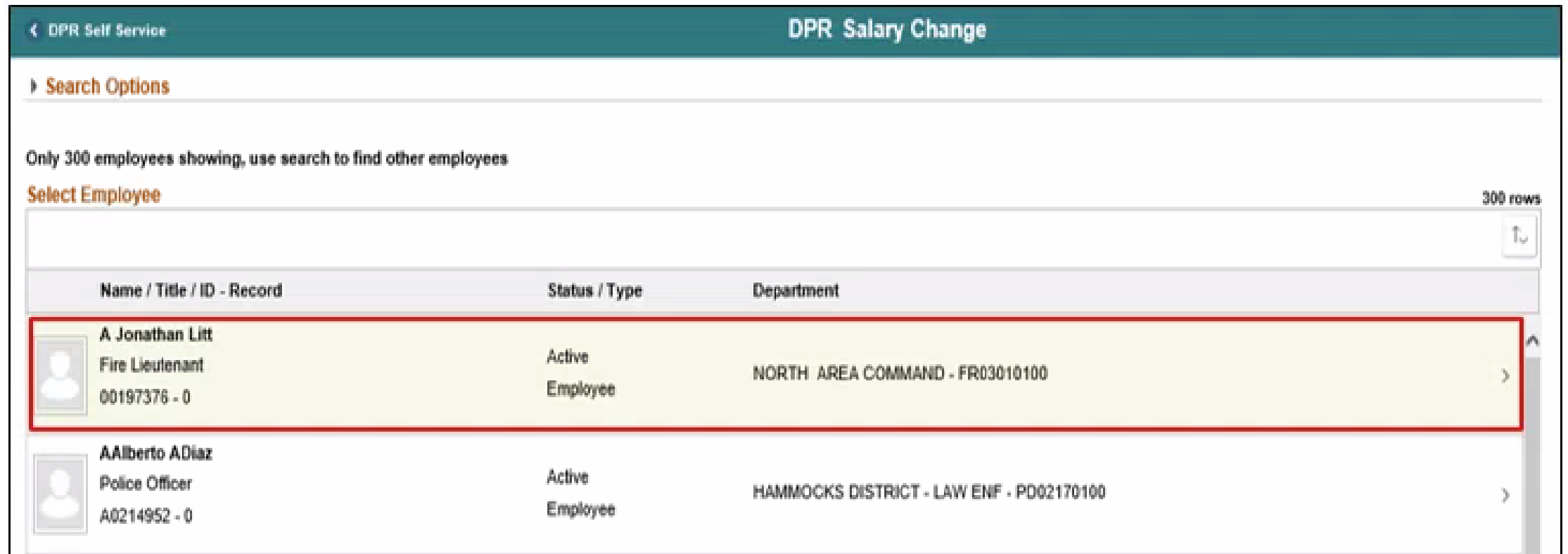
- Initiate the Merit Increase process (if applicable)

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.

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.

Lecture 1: Complete Evaluation Continued

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

Lecture 1: Complete Evaluation Continued

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

Lesson 2: Activities and Exercises
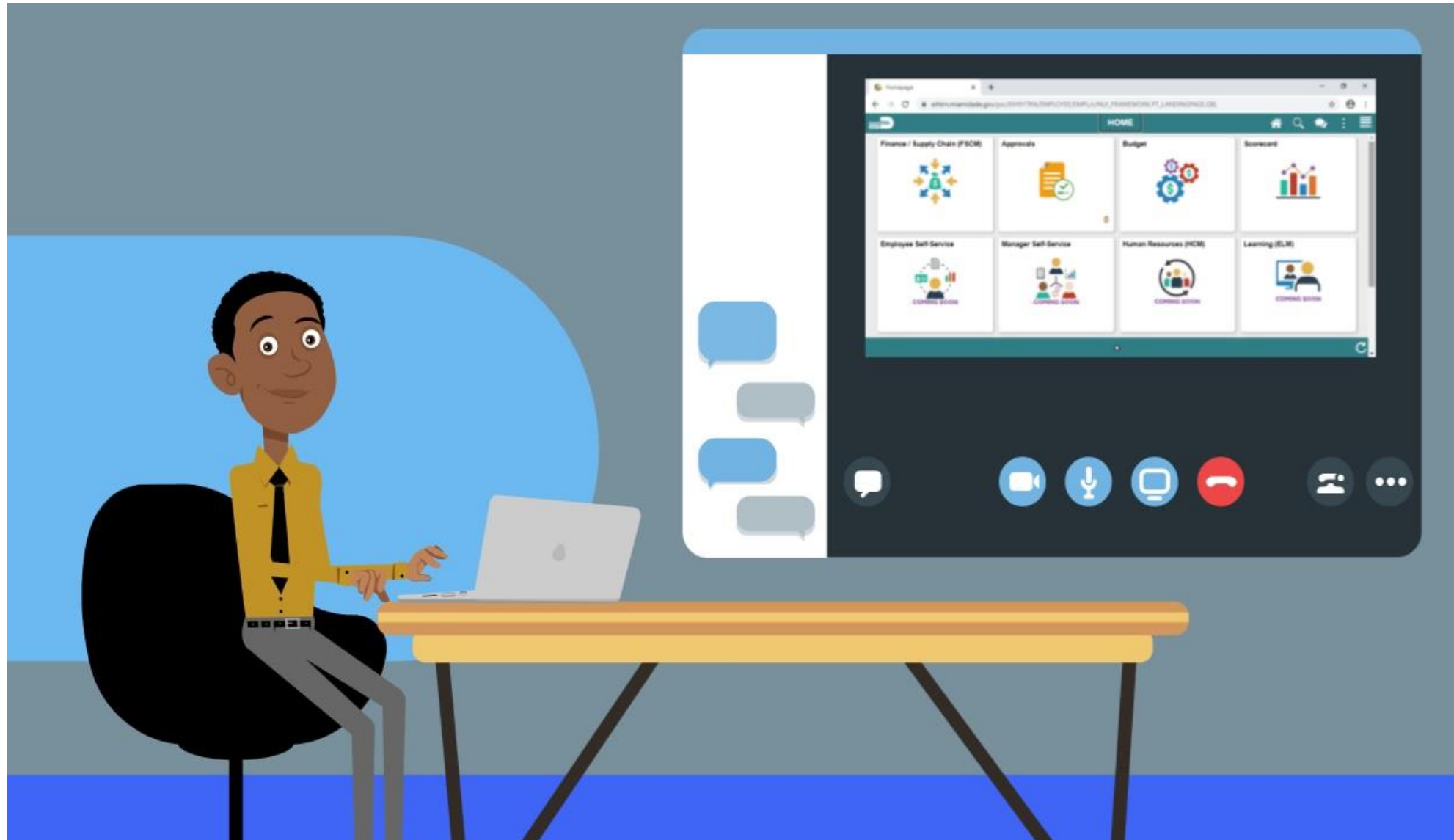
Lesson 2: Lesson Summary

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

MIAMI-DADE
COUNTY

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

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

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

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