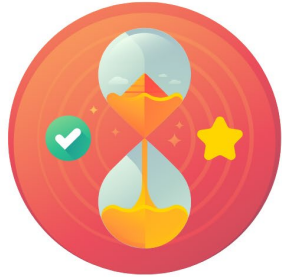
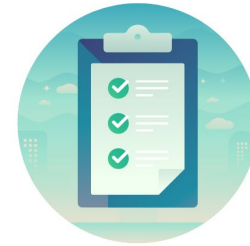


Course ID: DPR 302
Course: Departmental HR - Personnel Changes

Ground Rules



Be on time



Attendance



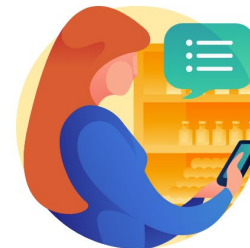
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

Course Overview

Course Description

This course provides a comprehensive review of the Personnel Changes processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Personnel Changes
 - Modify Position Management
 - Define Department/Position Budget Data
 - Submitting Position Change
 - Submit Job Data Changes that impact benefits
 - Submitting HR Transactions
 - Submitting HR Salary Changes
 - Payroll
 - Workflow Approvals
 - Reports and Queries
- Module 3: Course Summary

Course Overview, Continued

Training Audiences	<ul style="list-style-type: none">• DPR's
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of INFORMS• ERP 102 – INFORMS Navigation and Online Help• HCM 101 – Human Resources Fundamentals
Other Related Courses	<ul style="list-style-type: none">• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)• DPR 303 – Departmental HR - Time Management• DPR 304 – Departmental HR - Updating Team Information• DPR 321 – Departmental HR – Recruitment
Estimated Duration	<ul style="list-style-type: none">• Day 1 (6 Hours)• Day 2 (4 Hours)• Total duration: 10 Hours

Module 1: Course Introduction

Module Topics

The following key concepts were covered in this module:

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

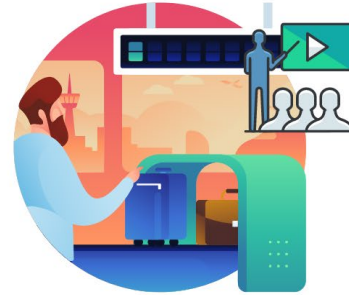
The End-to-End Business Process

Introduction to Demonstrations 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



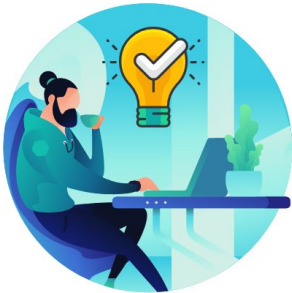
Please turn off your cell phones and refrain from checking email and the Internet while in class



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

- Modify Position Management
- Define Department/Position Budget Data
- Submit Position Change
- Submit Job Data Changes that Impact Benefits
- Submit HR Transactions
- Submit HR Salary Changes
- Payroll
- Workflow Approvals
- Reports and Queries

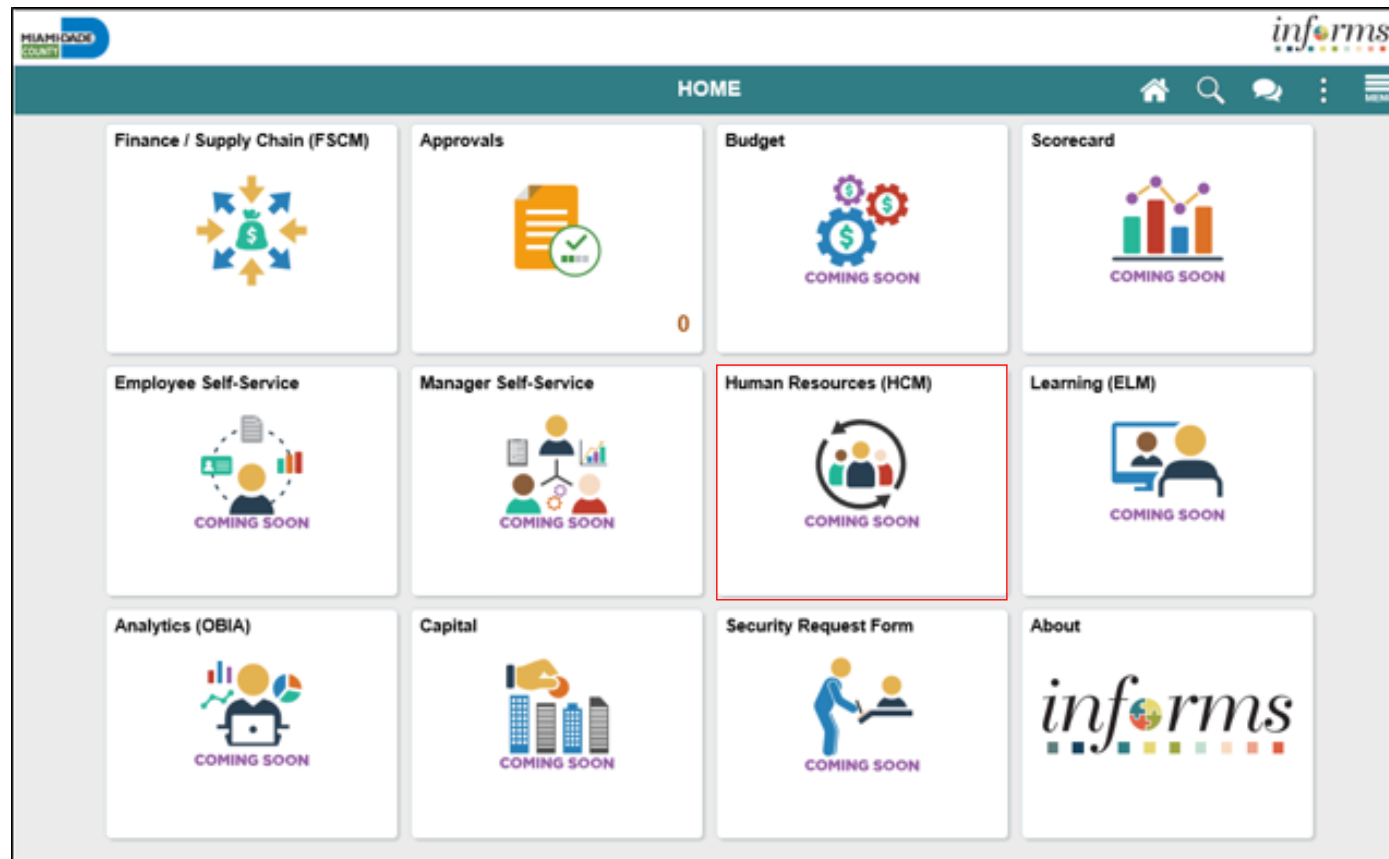
Roles and Responsibilities

The roles and responsibilities associated with:

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

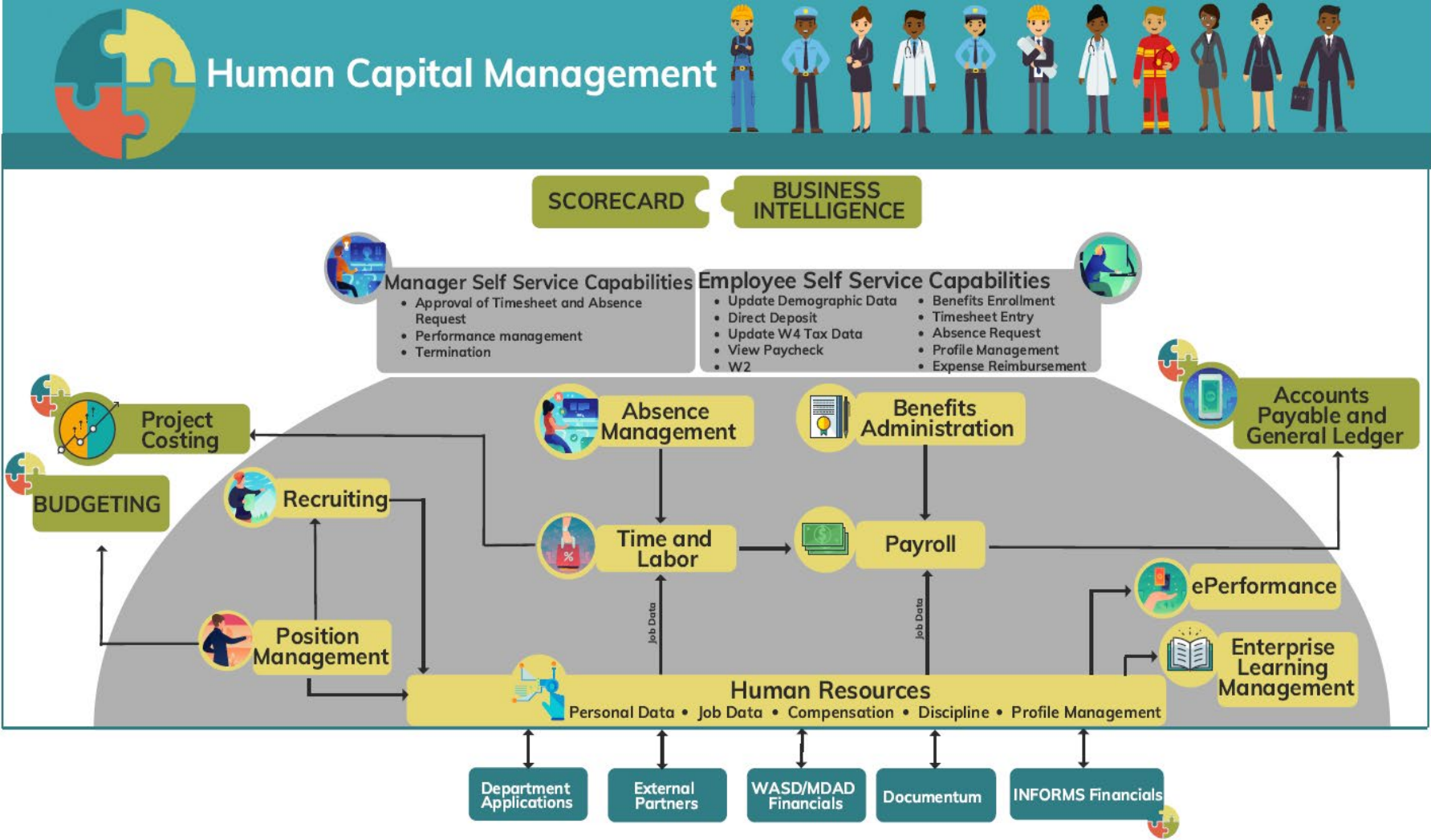
Login to INFORMS and select **Human Resources (HCM)** from the home landing page below:



Purpose and Benefits to Business Process

- Reduce paper processes
- Employee Empowerment (Employee Self Service and Manage Self Service, and Mobile Capabilities)
- Reduction of processing time
- Recruit to Hire to Paycheck in one system
- Enhanced Reporting
- Job Opening – Defaults from Position
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System – LOA, retirees, and benefit billing all in one system
- Recruitments will be managed through position wherever possible.
- Miami-Dade County will be using position management

End-to-End Business Process

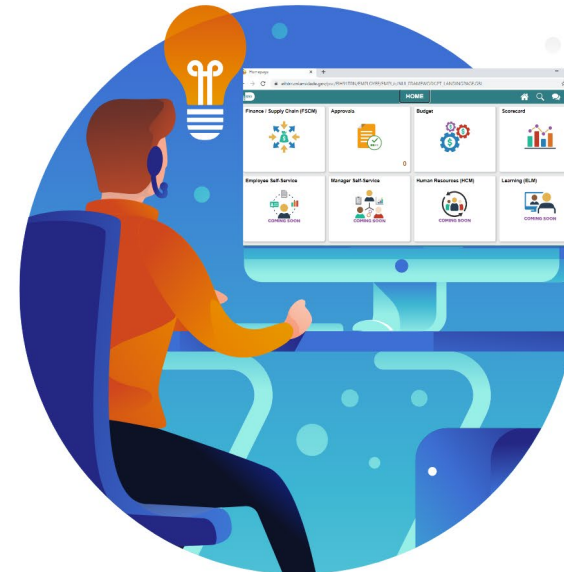


Introduction to Activities and Exercises

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

The following key concepts were covered in this module:

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 and Exercises

Module 2: Personnel Changes

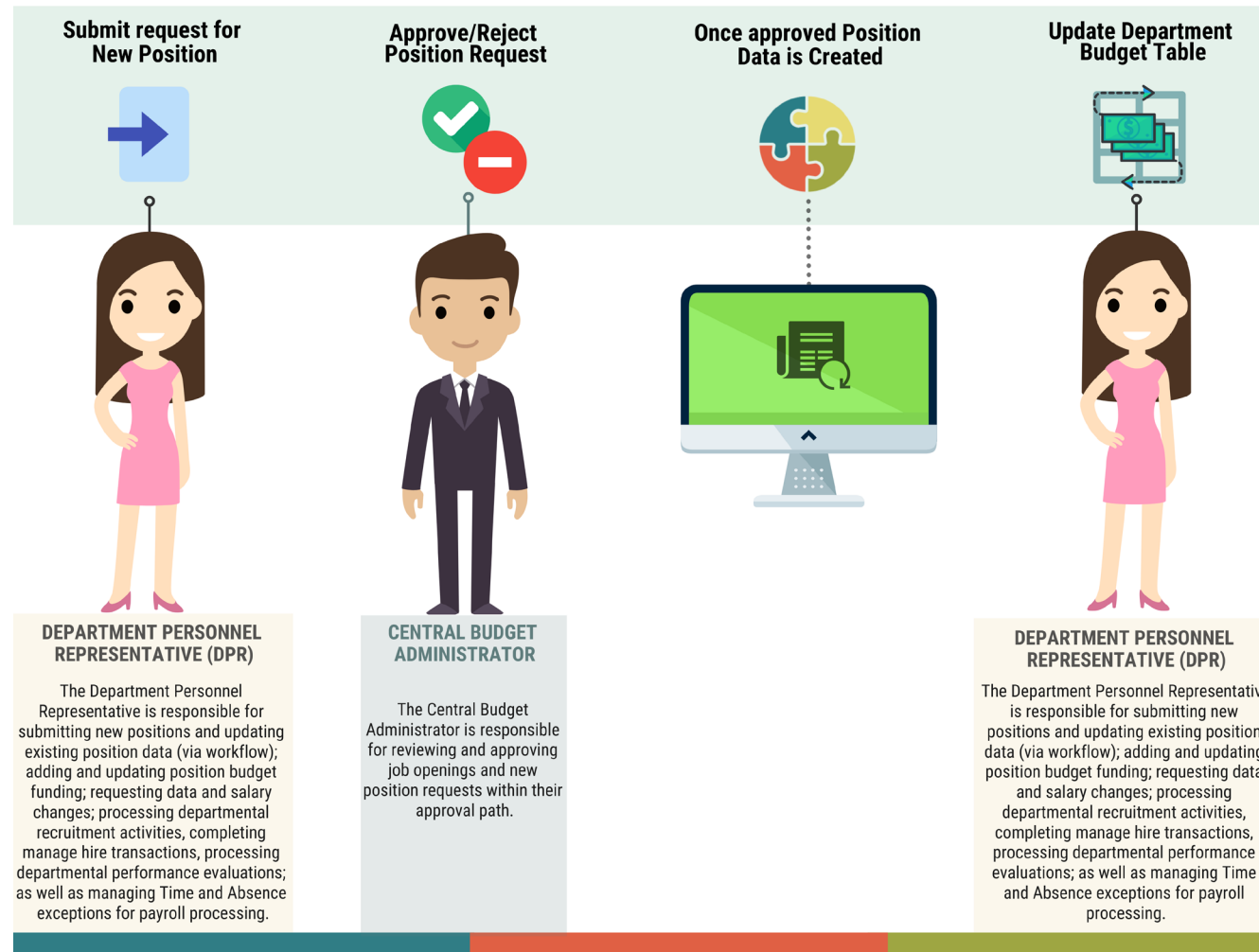
Module Topics

Module Introduction

- Lesson 1: Position Management
- Lesson 2: Define Department/Position Budget Data
- Lesson 3: Submitting Position Change
- Lesson 4: Submit Job Data Changes that impact benefits
- Lesson 5: Submitting HR Transactions
- Lesson 6: Submitting HR Salary Changes
- Lesson 7: Payroll
- Lesson 8: Workflow Approvals
- Lesson 9: Reports and Queries

Lesson 1: Position Management

NEW POSITION MANAGEMENT APPROVAL BUSINESS PROCESS



Lesson 1: Position Management

At the conclusion of this lesson, you will:

- Acquire knowledge of the Position Management Business Process
- Learn how to create new position requests
- Learn the Budget Approval Process
- Validate the New Position Request

Lesson 1: Key Terms

Term	Definition
Full-Time Equivalent (FTE)	A unit that indicates the workload of an employed person. FTE's are often used to measure a worker's involvement. The calculation of full-time equivalent is an employee's scheduled hours divided by 80 hours.
Job Code	Contains the classification's information such as title, salary plan and grade, bargaining unit, and job description. Previously known as Occupational Code.
Position Data	Information related to the position such as Position Information, Job Information, Work Location, Salary Plan Information.

Key Terminology Changes

Today	INFORMS Terminology
Departments	Business Unit (Processing Department)
Index Code	Chart of Accounts
Pay Exceptions	Components of Pay and Rate Codes
PAR Codes	Time Reporting Codes
DDL	Department ID
Adjusted Rate	Hourly Rate
Pay Plan (Steps and Range)	Salary Grade
Money Adjustments	Earning Codes
Occupational Code	Job Code
Status Code	Employee Class

Key Changes to Business Process

Position Management Changes are as follow:

- Departments can submit requests for new or changes to Position Data
 - Position Data is updated after OMB and Compensation approval
- Position Data now requires:
 - Lower-level Department IDs
 - Regular/Temporary Indicator – controls Florida Retirement System (FRS) and Benefits Eligibility
 - Job Code will default the Union Code, Salary plan and Grade information
- The DPR will be responsible for adding the default budget funding for new positions as well as updating budget funding for positions.

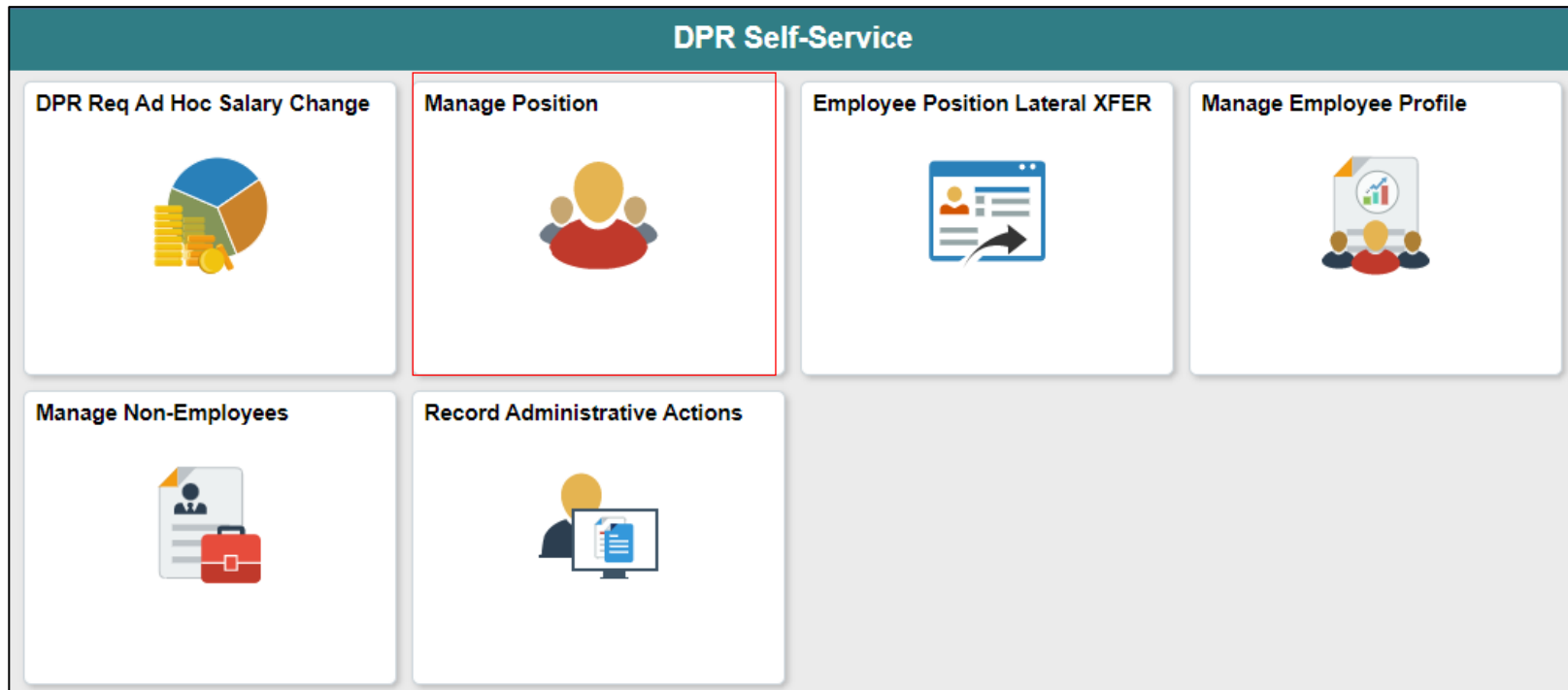
Lecture 1: Create New Position

- The Create New Position process consists of five **(5) Steps**
 - **Position Data**
 - **Additional Information**
 - **Attachments**
 - **Budget Incumbents**
 - **Review and Submit**

Once all the steps are completed, the OMB Budget Administrator will review and approve the new position request in the system. Once the request is fully approved, the new position is successfully established within the system.

Lecture 1: Create New Position

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**



Lecture 1: Create New Position

1. Select the **+Add** button, on the **View Manage/Create Position** page.

The screenshot shows a web interface for managing positions. The top navigation bar is teal and contains a back arrow, the text 'DPR Self-Service', and 'Manage/Create Position'. The main content area is split into two panels. The left panel, titled 'New Search', contains four input fields: 'Position Number', 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are two buttons: 'Search' (green) and 'Clear' (grey). The right panel, titled 'View Manage/Create Position', contains a single button with a red border, a plus sign, and the text '+ Add'.

2. In the ***Effective Date** field, enter a date that correlates with the beginning of the fiscal year.
3. Select **Continue**.

Lecture 1: Create New Position

1. In the ***Filed Status** field, select **Approved**.
2. In the **Max Head Count** field, enter the number of seats you are requesting with the same classification in that position.
3. In the ***Status** field select **Active** as users are requesting to activate a new position.
4. In the **Budgeted Position** ensure **Yes** is selected for budgeted positions.
5. In the **Non-Mayoral** field, ensure **No** is selected for positions under the Mayor's Purview.
Leave the **Senior Management** field as default.

NOTE: Proposed is selected when requesting a position for the next Fiscal Year.

Step 1 of 5: Position Data

Effective Date 12/27/2021
Effective Sequence 0

Reason Code NEW New Position
Approval Status Not Available

Position Information

*Filed Status	Approved	Max Head Count	2
*Status	Active	Non-Mayoral	No
Budgeted Position	<input checked="" type="checkbox"/> Yes	Senior Management	<input type="checkbox"/> No

Lecture 1: Create New Position

Select the following in the **Job Information** section:

6. The ***Business Unit** field will default by security.
7. In the **Full/Part Time** field, select **Full-Time** or **Part-Time** depending on the position.
8. In the ***Job Code** field, select the magnifying glass to search for the respective classification or enter the six-digit **Job Code (00XXXX)**.

Leave the following as defaulted:

- **Union Code** (Defaults from Job Code)
- **Short Title** (Defaults from Job Code)
- ***Regular Shift** (Defaults from Job Code)
- **Description** (Defaults from Job Code)
- ***Title** (Defaults from Job Code)
- ***Regular/Temporary** (Defaults as Regular from Job Code)

The screenshot shows the 'Job Information' form with the following fields and values:

*Business Unit	PR	Q	Parks, Recreation & Open Spcs	*Full/Part Time	Full-Time	▼
*Job Code	000459	Q	Hris Technician	Union Code	H	Q Local199 - General Employees
*Regular/Temporary	Regular	▼		Short Title	HRIS Techn	
*Regular Shift	Not Applicable	▼		Description	HRIS Technician	
*Title	HRIS Technician					

Lecture 1: Create New Position

In the **Work Location** section, users will review or select the following:

9. Ensure ***Reg Region** is set to **USA**.
10. In the ***Department** field, select or enter the **Department ChartField** where the position will be located.
11. In the **Location** field, enter the **Location ChartField** where the position will be located.
12. In the **Reports To** field, select the **reporting position number**.

NOTE: The Reports To field must have the position number of the direct report (immediate supervisor) of the new position.

13. In the **Supervisor Level** field, select the appropriate **Supervisor Level** for the classification

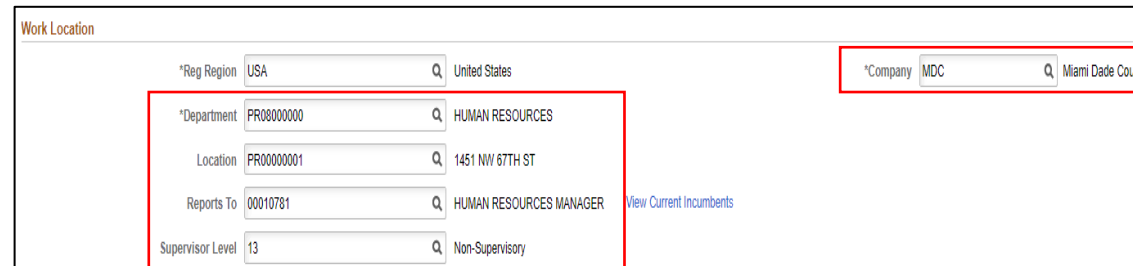
Lecture 1: Create New Position

Supervisor Level Chart with their respective description

Supervisor Level	Description
01	Mayor/Commissioners
02	Deputy Mayors/Special Advisors
03	Assistant to Mayor
04	Department Directors
05	Deputy Directors
06	Assistant Directors
07	Division Directors
08	Assistant to Directors
09	Assistant Division Directors
10	Sr. Bureau Commander/Bureau Commander/Section Head
12	Supervisor Classes
13	Non-Supervisory
14	Nonsupervisory Professionals
15	Protective Services

Lecture 1: Create New Position

14. In the ***Company** field, select **MDC** (Miami-Dade County).



The screenshot shows a 'Work Location' form with the following fields and values:

Field	Value	Search Results
*Reg Region	USA	United States
*Company	MDC	Miami Dade County
*Department	PR08000000	HUMAN RESOURCES
Location	PR00000001	1451 NW 67TH ST
Reports To	00010781	HUMAN RESOURCES MANAGER
Supervisor Level	13	Non-Supervisory

A red box highlights the *Company, *Department, Location, Reports To, and Supervisor Level fields. A blue link 'View Current Incumbents' is visible next to the Reports To field.

In the **Salary Plan** Information section, the following fields automatically default from the Job Code:

- **Salary Admin Plan** (Leave as Defaulted)
- **Grade** (Leave as Defaulted)
- **Work Period** (Leave as Defaulted)
- **Step** (Leave blank, step is only entered on employee job record.)

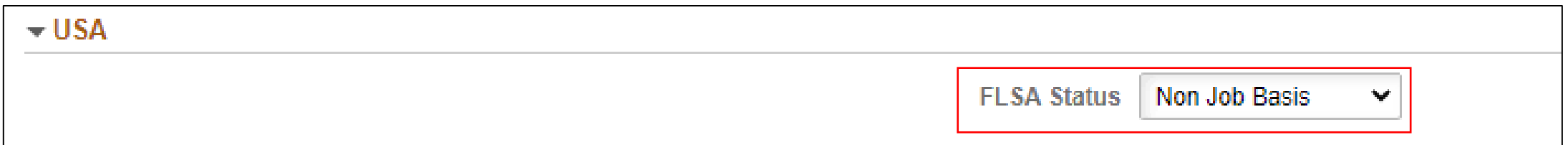
15. In the **Stand Hours** field, enter **80** for a **Full-Time position**.

NOTE: If the position is **Part-Time**, list the amount for the **scheduled hours to work**.

Lecture 1: Create New Position

In the **USA** section, the FLSA Status field automatically defaults from the Job Code:

- **FLSA Status - Non-Job Basis/Job Basis** (Leave as Defaulted)



The screenshot shows a software interface with a dropdown menu labeled "USA" on the left. To the right, there is a field labeled "FLSA Status" with a dropdown menu showing "Non Job Basis" and a downward arrow. A red rectangular box highlights the "FLSA Status" label and the dropdown menu.

Lecture 1: Create New Position

Position Number 00000000
Headcount Status Open
Current Head Count 0

Next >

Step 1 of 5: Position Data

Effective Date: 12/27/2021
Effective Sequence 0
Reason Code: NEW - New Position
Approval Status: Not Available

Position Information

*Filed Status: Approved
*Status: Active
Budgeted Position: Yes
Senior Management: No
Max Head Count: 2
Non-Mayoral: No

Job Information

*Business Unit: FR - Parks, Recreation & Open Spcs
*Job Code: 000459 - HRIS Technician
*Regular/Temporary: Regular
*Regular Shift: Not Applicable
*Title: HRIS Technician
*Full/Part Time: Full-Time
Union Code: H - Local 199 - General Employees
Short Title: HRIS Techn
Description: HRIS Technician

Work Location

*Reg Region: USA - United States
*Department: PR08000000 - HUMAN RESOURCES
Location: PR00000001 - 1451 NW 67TH ST
Reports To: 00010781 - HUMAN RESOURCES MANAGER
Supervisor Level: 13 - Non-Supervisory
*Company: MDC - Miami Dade County

Salary Plan Information

Salary Admin Plan: STEP
Standard Hours: 80.00
Work Period: B - Biweekly
Grade: 207
Step:

Specific Information
USA
FLSA Status: Non Job Basis

Lecture 1: Create New Position

In the **Full-Time Equivalent (FTE)** field, users must enter the proper FTE for the new position.

- For a **Full-Time position the FTE is 1** regardless of the number of employees seated within the position.
- For a **Part-Time position users must properly calculate this by taking the Scheduled hours and dividing it by 80 hours.**
 - **Example:** 59 Scheduled Hours/80 hours = 0.7375 hours. The FTE for this particular Part-Time position would be .7375 which users will enter in the FTE field.

NOTE: This is the factor that will prorate the employee's salary.

1. In the **FTE field**, enter the **1** for Full-Time.
2. Select **Next** to go to **Attachments – Step 3 of 5**.

Exit Create Position

Position Number: 00000000
Headcount Status: Open
Current Head Count: 0

< Previous Next >

1 Position Data Visited

2 Additional Information Visited

3 Attachments Visited

4 Budget Incumbents Visited

5 Review and Submit Not Started

Step 2 of 5: Additional Information

Effective Date: 12/27/2021 Reason Code: NEW - New Position
Effective Sequence: 0 Approval Status: Not Available

Education and Government

*Pre-Encumbrance Indicator: Encumber Immediately

*Encumber Salary Option: Salary Step

*Classified Indicator: Classified

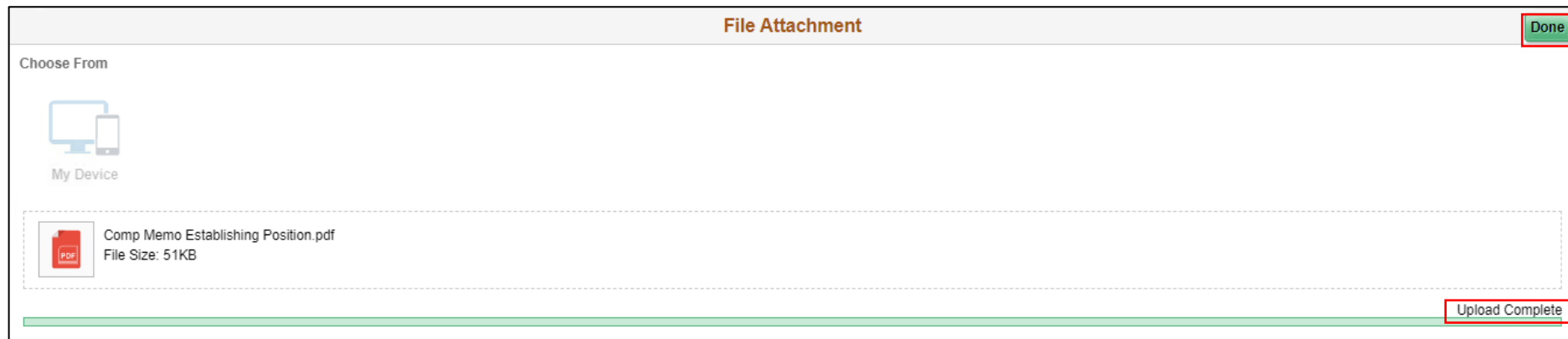
FTE: 1.000000

Adds to FTE Actual Count: No

Lecture 1: Create New Position

In the **Attachments** page (Step 3 of 5), users will add supporting documentation for the new position.

1. Select **Add Attachment**.
2. Select **My Device**.
3. Search and **select the document being attached**.
4. Select **Open**.
5. Select **Upload**.
6. Select **Done** once the upload is complete.



Lecture 1: Create New Position

7. In the **Description** field, enter a **brief description of the documentation**.
8. Select **Next** to go to **Budget Incumbents – Step 4 of 5**.

Exit Create Position

Position Number 00000000
Headcount Status Open
Current Head Count 0

< Previous Next >

1 Position Data Visited
2 Additional Information Visited
3 Attachments Visited
4 Budget Incumbents Not Started
5 Review and Submit Not Started

Step 3 of 5: Attachments

Effective Date 12/27/2021 Reason Code NEW New Position
Effective Sequence 0 Approval Status Not Available

Attachments

Add Attachment

Attachments	Description	Attached By	Attached	Status
Comp_Memo_Establishing_Position.pdf	Comp Memo Establishing (2) New Positions 12-27-21	Xavier Washington	12/27/21 10:21:47 AM	Active

Lecture 1: Create New Position

In the **Budget Incumbents** page (Step 4 of 5), users will review and leave defaulted items as is.

Update Incumbents (Leave as Defaulted).

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

1. Select **Next** to go to **Review and Submit – Step 5 of 5.**

The screenshot shows the 'Create Position' interface at Step 4 of 5: Budget Incumbents. The top navigation bar includes an 'Exit' button and the title 'Create Position'. Below the navigation bar, the following information is displayed: Position Number 00000000, Headcount Status Open, and Current Head Count 0. A 'Previous' button is disabled, and a 'Next' button is highlighted in orange. The main content area is divided into a left sidebar and a main panel. The sidebar contains five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited, highlighted in green), and 5. Review and Submit (Not Started). The main panel displays the following details: Effective Date 12/27/2021, Effective Sequence 0, Reason Code NEW New Position, and Approval Status Not Available. Under the 'Current Budget' section, Head Count 0 and Current Budget FTE 0.00 are shown, along with Amount 0.000. The 'Incumbents' section shows 'Update Incumbents' set to 'No' (via a radio button), 'Include Salary Plan/Grade' set to 'No', and 'Force Update for Title Changes' set to 'No'. At the bottom, 'Current Incumbents' is listed as 'No Incumbents to display'.

Lecture 1: Create New Position

2. Select **Submit**.

The screenshot displays the 'Create Position' application interface. At the top, there is a header bar with 'Exit' on the left and 'Create Position' in the center. Below the header, the following information is displayed: Position Number 00000000, Headcount Status Open, and Current Head Count 0. On the right side of this section, there are two buttons: '< Previous' and 'Submit'. The 'Submit' button is highlighted with a red border.

The main content area is divided into a left sidebar and a main panel. The sidebar contains five steps, each with a number and a 'Visited' status: 1 Position Data, 2 Additional Information, 3 Attachments, 4 Budget Incumbents, and 5 Review and Submit. The 'Review and Submit' step is highlighted with a green background.

The main panel is titled 'Step 5 of 5: Review and Submit'. It contains the following information: Effective Date 12/27/2021 (highlighted with a red box), Effective Sequence 0, Reason Code NEW New Position, and Approval Status Not Available.

Below this information is a section titled 'Key Information' which contains a table with two columns: 'Description' and 'Proposed Value'. The table is highlighted with a red border.

Description	Proposed Value
Business Unit	PR
Department	PR08000000
Job Code	000459
Max Head Count	2
Reports To Position Number	00010781
Location Code	PR00000001
Company	MDC

Lecture 1: Create New Position

The **Position Confirmation** page is displayed, and the new position request is successfully submitted pending the approval of the OMB Business Administrator.

Notice the **New Position Number** issued.

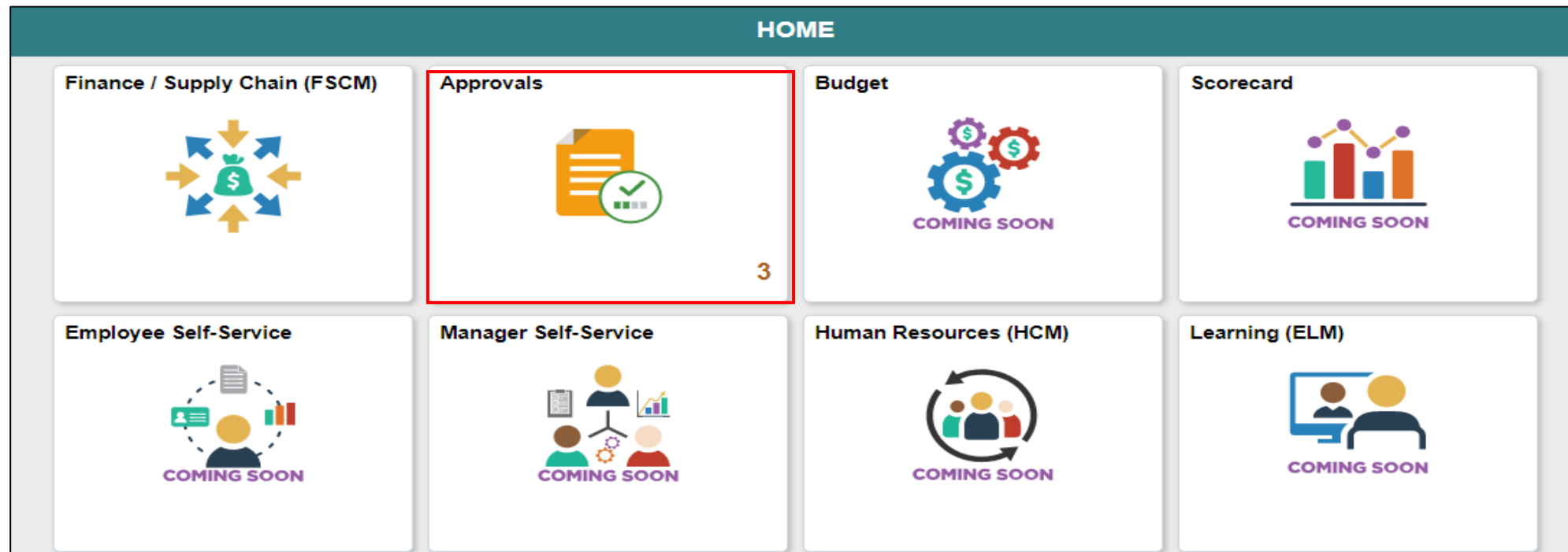
The screenshot displays the 'Position Confirmation' interface. At the top, a green banner contains a success message: 'The New Position Number 59000759 has been successfully submitted for approval.' Below this, a table titled 'New Position Approval' shows the status of the request. The table has a header row with 'New Position' and 'Pending'. The main body of the table lists two approval steps, both with 'Multiple Approvers' and a right-pointing chevron icon. The first step is 'Pending' with 'Multiple Approvers OMB Administrator'. The second step is 'Not Routed' with 'Multiple Approvers Compensation Administrator'. At the bottom of the page, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

New Position Approval	
New Position	Pending
New Position Approval	
Pending	
Multiple Approvers OMB Administrator	>
Not Routed	
Multiple Approvers Compensation Administrator	>

Lecture 2: Budget Approval

- The OMB Budget Administrator is responsible for approving new position requests within the system.

Navigate to Approvals: Select **Approvals**



Lecture 2: Budget Approval

1. Select the **New Position** pending approval.

View By	Type			
All	3	All		3 rows
Create Position	3	Create Position	Position Number MD000033	Routed
		Data Entry Specialist 1	New Position	12/20/2021
		Create Position	Position Number TST00000	Routed
		Park Service Aide	New Position	12/21/2021
		Create Position	Position Number 59000759	Routed
		HRIS Technician	New Position	12/22/2021

2. Select the **View Position Details** hyperlink to view the details of the new position requested.

Position Number 59000759
Title HRIS Technician

Effective Date 11/02/21
Effective Sequence 0
Reason Code NEW

Proposed Changes

Description	Proposed
Business Unit	PR
Company	MDC
Department	PR08000000
Job Code	000459
Location Code	PR00000001
Max Head Count	2
Reports To Position Number	00010780

Additional Details

[View Position Details](#)

Attachment Details

Attachments

Approver Comments

Approval Chain

Lecture 2: Budget Approval

A new tab will open displaying all the details of the new position request.

View Position 🏠 🔔 ⋮

Position Number: 59000759
 Headcount Status: Open
 Current Head Count: 0 of 0

Effective Date: 11/02/2021 << Previous Next >>
 Effective Sequence: 0
 Reason: NEW - New Position
 Approval Status: In Approval Process

Position Information

Position Status: Approved	Max Head Count: 2
Status: Active	Status Date: 11/02/2021
Action Date: 12/22/2021	
Key Position: No	Job Sharing Permitted: No
Budgeted Position: Yes	Non-Mayoral: No
Senior Management: No	

Job Information

Business Unit: PR	Parks, Recreation & Open Spcs	Manager Level: All Other Positions
Job Code: 000459	HRIS Technician	Full/Part Time: Full-Time
Regular/Temporary: Regular		Union Code: H Local/99 - General Employees
Regular Shift: Not Applicable		Short Title: HRIS Techn
Title: HRIS Technician		Description: HRIS Technician

Work Location

Reg Region: USA	United States	Company: MDC Miami Dade County
Department: PR00000000	HUMAN RESOURCES	Dot Line
Location: PR00000001	1451 NW 67TH ST	Security Clearance
Reports To: 00010780	CHIEFHUMAN RESOURCES DIVISION View Current Incumbents	
Supervisor Lvl: 13	Non-Supervisory	

Salary Plan Information

Pay Plan	Grade: 207
Salary Admin Plan: STEP	Step
Standard Hours: 80.00	Mon Tue Wed Thu Fri Sat Sun
Work Period: B	Biweekly

→ USA

- ▶ Specific Information
- ▶ Education and Government
- ▶ Budget and Incumbents
- ▶ Summary of Changes
- ▼ Attachments

[View Attachments](#)

Lecture 2: Budget Approval

3. Select the **Attachments** tab to view any supporting documentation added to the request.
4. Select the **attachment hyperlink** to view the supporting documentation.

Attachments	Description	Attached By	Attached
Comp_Memo_Establishing_Position.pdf	Comp Establishment of (2) New Positions (11-2-21)	Xavier Washington	12/22/21 01:38:02 PM

5. Select **Approve**.
NOTE: Enter comments as needed.
6. Select **Submit**.

Cancel **Approve** Submit

You are about to approve this request.

Approver Comments

Reviewed and Approved

Lecture 2: Budget Approval

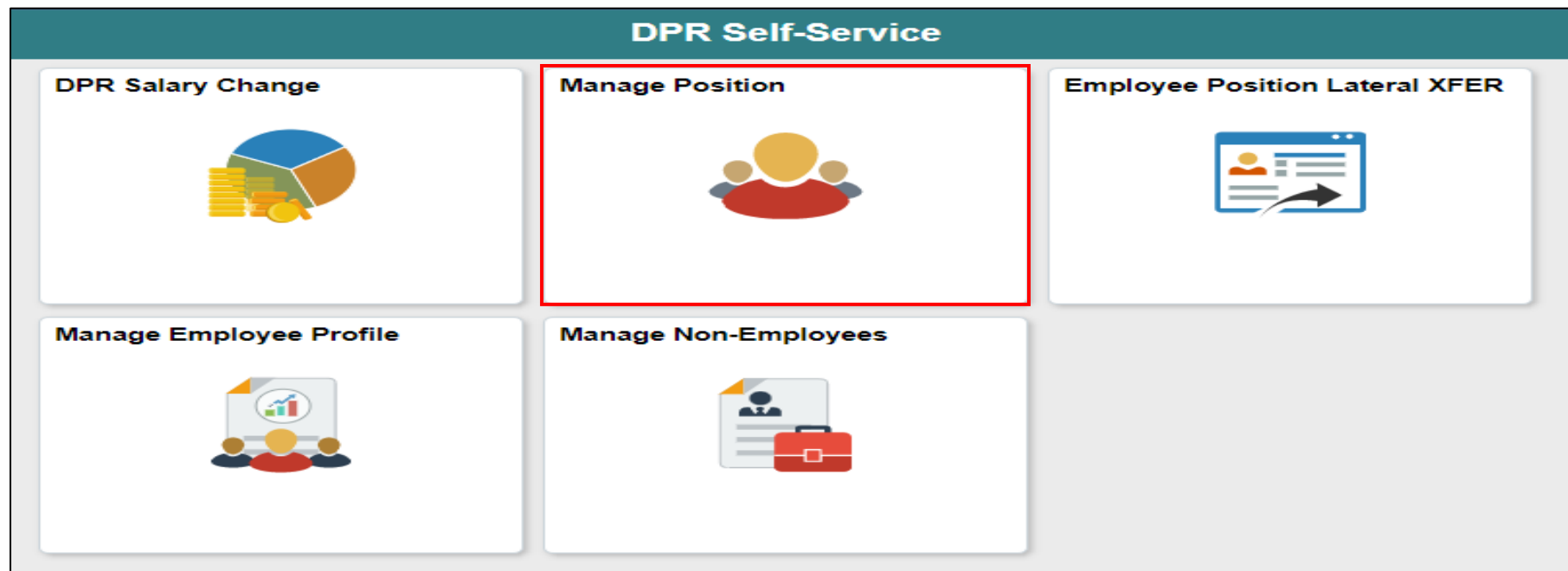
Notice the Position is no longer in the Pending Approvals page.

Pending Approvals		
All		2 rows
Create Position Data Entry Specialist 1	Position Number MD000033 New Position	Routed 12/20/2021 >
Create Position Park Service Aide	Position Number TST00000 New Position	Routed 12/21/2021 >

Lecture 4: Validate Position

Once the New Position request is fully approved, the DPR can validate the position request.

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**



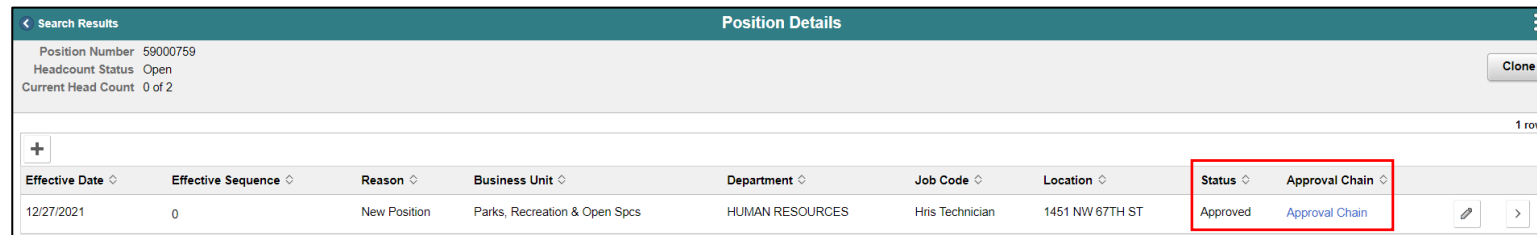
Lecture 4: Validate Position

1. In the **Position Number** field, enter the position number being validated.
2. Select **Search**.

The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search filter panel titled 'New Search' with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. On the right, the main area is titled 'View Manage/Create Position' and contains a '+ Add' button. The top navigation bar includes a back arrow, 'DPR Self-Service', and 'Manage/Create Position'.

Lecture 4: Validate Position

3. Select the **position being validated**.
4. Select the **Approval Chain** hyperlink to link to view the approvers.



The screenshot shows a 'Position Details' table with the following data:

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
12/27/2021	0	New Position	Parks, Recreation & Open Spcs	HUMAN RESOURCES	Hris Technician	1451 NW 67TH ST	Approved	Approval Chain

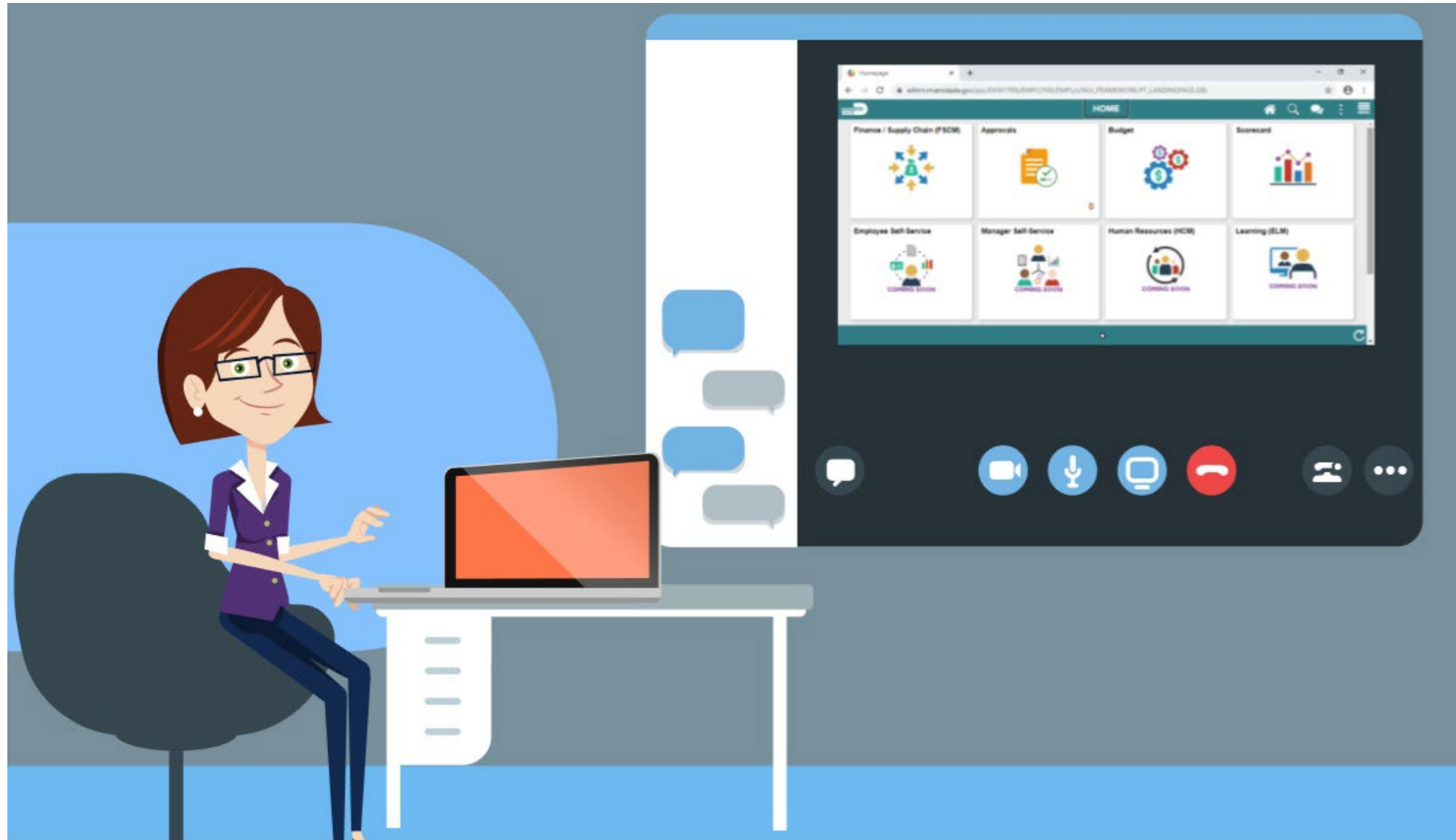
Notice the OMB Administrator approval as well as the time and dates the request was approved.



The 'Create Position' dialog box shows a 'New Position Approval' section with the following details:

Approval Status	Approver	Date/Time
Approved	Ulises Lincheta OMB Administrator	01/10/22 9:34 AM
Approved	Ulises Lincheta Compensation Administrator	01/10/22 9:35 AM

Lesson 1: Activities and Exercises



Lesson 1: Summary

Now that you have completed the lesson, you have:

- Acquired knowledge of the Position Management Business Process
- Learned how to create new position requests
- Learned the Budget Approval Process
- Validated the New Position Request

Position Management Roles

INFORMS End-User Role	Description
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self-Service transactions.
HR Central Position Administrator	The HR Central Position Administrator is responsible for creating, reviewing, editing and approving position edits and reporting.
HR Central Administrator Technician	The HR Central Administrator Technician is responsible for Job Data changes. The HR Central Administrator Technician will review and audit Manage Hire transactions.

Position Management – Key Changes

- For integration with Payroll, Position Data now requires:
 - Department ID (Formerly DDL)
 - FTE/Standard Hours (bi-weekly hours worked)
 - Bi-weekly Rate determined by FTE
 - Classifies total bi-weekly standard hours for each position
 - Reg/Temp Indicator
 - Controls FRS and Benefits Eligibility
 - Job Code will default
 - Union Code
 - Salary Plan and Grade

Lesson 2: Define Department/Position Data

At the conclusion of this lesson, you will :

- Learn how Department budget funding is established for new positions.
- Learn how to update Department budget funding on existing positions.
- Learn how to inactivate Department budget funding for a position

Lesson 2: Key Terms

Term	Definition
Combination Code	A key that defines a combination of ChartFields needed for Position Budget Funding

POSITION BUDGET/FUNDING

BUSINESS PROCESS

Add/Update/Inactivate
Department Position
Budget Funding



System generates
Department Position
Budget Funding request



**DEPARTMENT PERSONNEL
REPRESENTATIVE (DPR)**

The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions

Lecture 1: Add Position Budget Funding

The Department Budget Table consists of five (5) tabs:

- Dept Budget Date – the Fiscal Year and Budget Begin/End dates as well as the Suspense Combination code are defined here.
- Dept Budget Defaults – the Funding Defaults and Account Overrides are defined here.
- Dept Budget Earnings, Dept Budget Deduction, and Dept Budget Taxes tabs must contain the same fields throughout. The following are defined here:
 - Effective Date – The date the budget funding action begins for new positions. The date when modifying the combination code for a position within a Fiscal Year and when the budget funding ends for inactive positions.
 - Combination Code (Combo Code) – The combination code is used to identify funding sources for the budget.
 - Distribution – The percentage allocated to combination code.
 - Sequence #1 – the initial setup to fund all codes to the same funding string.

Lecture 1: Add Position Budget Funding

The main Department Budget Table USA tabs needed **when adding the budget funding for a new position** are the following:

- Dept Budget Date
- Dept Budget Defaults
- Dept Budget Earnings

The main budget tabs needed **when updating the budget funding for a position** are the following:

- Dept Budget Earnings
- Dept Budget Deductions
- Dept Budget Taxes

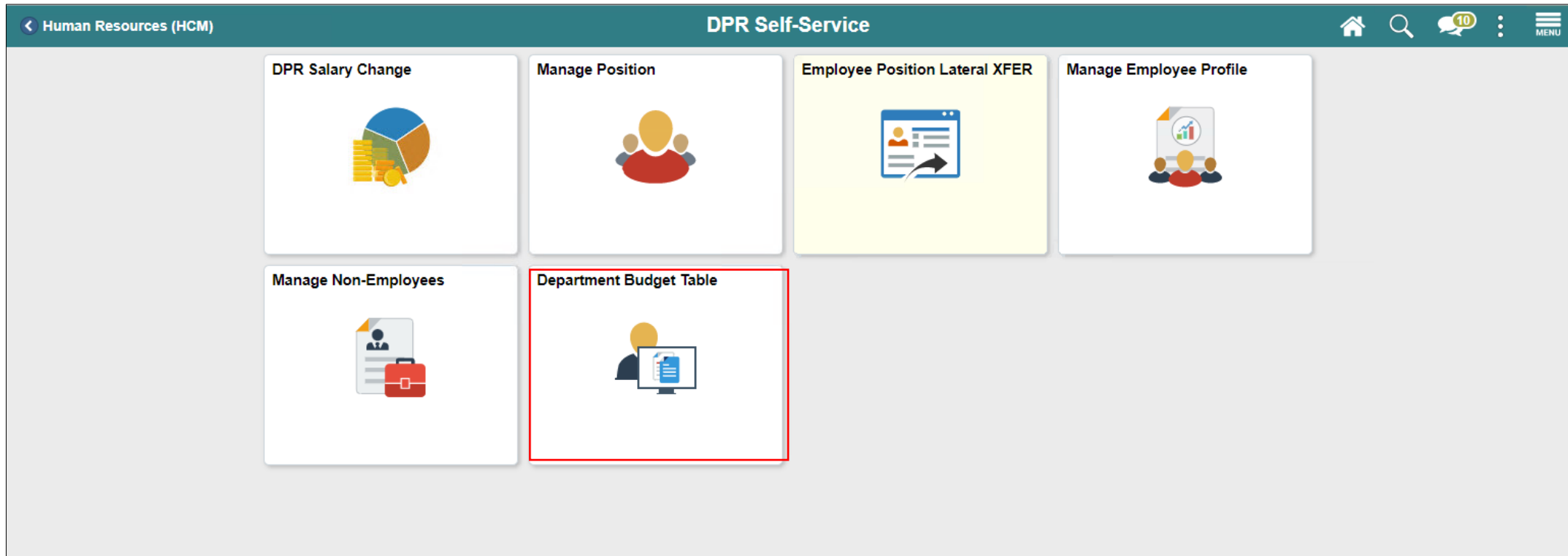
NOTE: It is important to ensure that when updating the combination code for a position that the distribution percentage and combination code are the same across all three; Dept Budget Earnings, Dept Budget Deductions, and Dept Budget Taxes tabs.

The main budget tab needed **when inactivating the budget funding** for a position is the Dept Budget Earnings tab.

NOTE: The position budget date needs to coincide with the beginning of the fiscal year.

Lecture 1: Add Position Budget Funding

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table USA**



Lecture 1: Add Position Budget Funding

1. Select the **Add a New Value** tab to add the budget funding for the new position.
2. In the **Set ID** field, ensure it is set to **the Department specific Set ID**.
3. In the **Department** field, enter the **Department ID ChartField used when creating the new the position**.

NOTE: The Department ID selected must be the same Department ID used when creating the new position.

The screenshot displays the 'Department Budget Table USA' application interface. At the top, there is a navigation bar with a back arrow and the text '< HOME' on the left, and 'Department Budget Table USA' on the right. Below the navigation bar, the title 'Department Budget Table USA' is repeated. There are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter being highlighted in red. A red box highlights the following input fields: 'Set ID' (with the value 'MDC'), 'Department', 'Fiscal Year' (with the value '0'), and 'Budget Level' (a dropdown menu). Below these fields are several other input fields, each with a search icon: 'Position Pool ID', 'Job Code Set ID', 'Job Code', 'Position Number', 'Empl ID', and 'Empl Record' (with the value '0'). At the bottom left of the form area, there is a green 'Add' button.

Lecture 1: Add Position Budget Funding

4. In the **Fiscal Year** field, enter the **Fiscal Year when the new budget funding will take place.**
5. In the **Budget Level** field, select **Position.**

NOTE: Currently the budget funding is at the position level which means that on the job record there is a position assigned to employees.

Lecture 1: Add Position Budget Funding

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

Lecture 1: Add Position Budget Funding

6. In the **Position Number** field, enter the **Position Number** for the new position that requires the budget funding.
7. Select **Add**.

The screenshot displays the 'Department Budget Table USA' interface. At the top, there is a navigation bar with a back arrow and the text 'HOME' on the left, and 'Department Budget Table USA' on the right. Below this, the title 'Department Budget Table USA' is repeated. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red box. Below the buttons is a form with several fields, each with a search icon (magnifying glass):

- Set ID: MDC
- Department: (empty)
- Fiscal Year: 0
- Budget Level: (dropdown menu)
- Position Pool ID: (empty)
- Job Code Set ID: (empty)
- Job Code: (empty)
- Position Number: (empty) - This field is highlighted with a red box.
- Empl ID: (empty)
- Empl Record: 0

At the bottom of the form, there is a green 'Add' button, which is also highlighted with a red box.

Lecture 1: Add Position Budget Funding

The Dept Budget Date page requires the Fiscal Year, *Offset Group, and the Suspense Combination Code for funding the new position.

1. Select the **Dept Budget Date** tab.
2. In the ***Budget Begin Date** and ***Budget End Date**, to enter the Beginning and End Date for the Fiscal Year.
3. In the ***Offset Group**, select **MDC** for Miami Dade Offset.
4. In the **Suspense Combination Code** section, in the ***Effective Date** field enter the **beginning date of the Fiscal Year**.

NOTE: The *Effective Date in the Suspense Combination Code is always the beginning date of the Fiscal Year.

5. Select the **ChartField Details** hyperlink to enter the **Suspense Combination Code**.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Date' tab is selected. The form contains the following fields and values:

- Set ID: MDC
- Department: PR0800000 HUMAN RESOURCES
- Fiscal Year: 2022
- *Budget Begin Date: 10/01/2021
- *Budget End Date: 09/30/2022
- *Offset Group: MDC (Miami Dade Offset)
- Budget Cap: Per Budget Level (selected)
- Suspense Combination Code: *Effective Date: 10/01/2021, Effective Sequence: 0
- Combination Code: ChartField Details (hyperlink)
- Balance: 0.00

Buttons at the bottom include Save, Notify, Add, Update/Display, and Include History. A breadcrumb trail at the bottom reads: Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes.

Lecture 1: Add Position Budget Funding

6. In the **Combination Code** field, enter **SUSP_DEFAULT**.
7. Once the **ChartField Details** are loaded, select **Ok**.

NOTE: Each Department will have a Department Specific Suspension Combination Code.

ChartField Common Component

ChartField Details

Combination Code:

Search Options

Combination Codes

Search

ChartField Detail

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
<input type="text" value="G1001"/>	<input type="text" value="PR00000000"/>	<input type="text" value="5001170000"/>	<input type="text" value="NO-GRANT"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Ok Cancel

Lecture 1: Add Position Budget Funding

Notice the **Suspense Combination Code** loaded. Review to ensure all fields are correct.

The screenshot displays the 'Department Budget Table USA' interface. At the top, there are navigation tabs: 'Dept Budget Date' (selected), 'Dept Budget Defaults', 'Dept Budget Earnings', and 'Dept Budget Deductions'. The main content area shows the following details:

- Set ID: MDC
- Department: PR08000000 HUMAN RESOURCES
- Fiscal Year: 2022
- *Budget Begin Date: 10/01/2021
- *Budget End Date: 09/30/2022
- *Offset Group: MDC (Miami Dade Offset)

Below this is the 'Budget Cap' section with two radio buttons: 'Per Budget Level' (selected) and 'Per Earn/Tax/Ded'.

The 'Suspense Combination Code' section shows a table with one entry:

*Effective Date	Effective Sequence	Combination Code	Default Suspense	Balance
10/01/2021	0	SUSP_DEFAULT		0.00

At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'. A footer navigation bar includes links for 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings', 'Dept Budget Deductions', and 'Dept Budget Taxes'.

Lecture 1: Add Position Budget Funding

1. Select the **Dept Budget Defaults** tab.

Ensure in Funding Defaults the ***Default Funding Source Option** field is set to **Distrib over Actual Earnings**.

Ensure the following fields are **selected** in the **Account Overrides** section:

- **Use Acct Defined for Earnings**
- **Use Account Defined for Dedns**
- **User Account Defined for US Tax**
- **User Account Defined for Can Tax**

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Defaults' tab is selected and highlighted with a red box. The interface shows the following details:

- Set ID:** MDC
- *Budget Begin Date:** 10/01/2021
- *Budget End Date:** 09/30/2022
- Department:** PR08000000 HUMAN RESOURCES
- Fiscal Year:** 2022
- *Offset Group:** MDC (Miami Dade Offset)
- Budget Cap:** Per Budget Level, Per Earn/Tax/Ded
- Funding Defaults:**
 - *Default Funding Source Option:** Distrib over Actual Earnings (highlighted with a red box)
 - Funding End Date Defaults From Funding Source
 - Exclusion Fringe Group: [Empty dropdown]
- Account Overrides:**
 - Use Acct Defined for Earnings
 - Use Account Defined for Dedns
 - Use Account Defined for US Tax
 - Use Account Defined for CanTax

Buttons at the bottom include 'Save', 'Notify', 'Add', 'Update/Display', and 'Include History'. Navigation links at the bottom include 'Dept Budget Date', 'Dept Budget Defaults', 'Dept Budget Earnings', 'Dept Budget Deductions', and 'Dept Budget Taxes'.

Lecture 1: Add Position Budget Funding

1. Select the **Dept Budget Earnings** tab

Notice the **Position number** where the budget funding is being added.

2. In the **Level section's *Effective Date** field, enter the effective date of the beginning of the pay period of the employee's first paycheck.

NOTE: The Level Effective Date should be on or before the pay period beginning of the employee's first paycheck.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Earnings' tab is selected and highlighted with a red box. The interface shows the following details:

- Set ID: MDC, Department: PR08000000 HUMAN RESOURCES, Fiscal Year: 2022
- Budget Begin Date: 10/01/2021, Offset Group: MDC
- Budget End Date: 09/30/2022
- Default Funding Source Option: Distrib over Actual Earnings
- Budget Cap: Per Budget Level, Per Earn/Tax/Ded
- Level section: Department, Position Pool, Jobcode, Position, Appointment
- Position Number: 59000759 (highlighted with a red box)
- *Effective Date: 11/15/2021 (highlighted with a red box)
- Budget Level Cap: 0.00
- HRIS Technician: HRIS Technician
- Eff Seq: 0
- *Status: Active
- *Currency: USD
- Date Entered: 03/04/2022

The 'Earnings Distribution' section is visible at the bottom of the interface.

Lecture 1: Add Position Budget Funding

3. In the ***Status** field, select **Active**.
4. In the **Earnings Distribution** section, select the **Combination Code** tab.
5. In the ***Sequence Number** field enter **1**.
6. Hit the **Tab** key.
7. In the **Distribution %** field, enter **100**.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | **Dept Budget Earnings** | Dept Budget Deductions >

Set ID MDC Department PR08000000 HUMAN RESOURCES Fiscal Year 2022
Budget Begin Date 10/01/2021 Offset Group MDC Budget Cap
Budget End Date 09/30/2022 Per Budget Level Per Earn/Tax/Ded
Default Funding Source Option Distrib over Actual Earnings

Level Department Position Pool Jobcode Position Appointment + -
Position Number 59000759 HRIS Technician ***Status Active** Date Entered 03/04/2022
*Effective Date 11/15/2021 Eff Seq 0 *Currency USD
Budget Level Cap 0.00

Earnings Distribution

Earnings Code	*Sequence Number	Combination Code	Funding End Date	Fiscal Year Budget Amount	Allow Overspend	Distribution %
1	1				<input type="checkbox"/>	100

Save Notify Add Update/Display Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lecture 1: Add Position Budget Funding

8. Select the **Combination Code Description** tab.
9. Select the **ChartField Details** hyperlink to select the Combination Code.
10. Select **Search** to locate the Combination Code.

NOTE: If you do not know the Combination Code select the Search button to search with any specific ChartField Detail field. If there is no Combination Code with specific ChartFields required for that position, contact Central Finance to assist with creating the new Combination Code.

ChartField Common Component

ChartField Details

Combination Code

Search Options

Combination Codes

Search

ChartField Detail

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Ok Cancel

Lecture 1: Add Position Budget Funding

11. Enter the **ChartFields** and select **Search**.

12. Select the **Select** button to load the **Combination Code**.

13. Select **Save**.

Search Combination Codes

GL Combination Code

Search by ChartFields

Fund Code	G4001	Source Type	<input type="text"/>	ChartField 2	<input type="text"/>
Department	PR08010000	Category	<input type="text"/>	ChartField 3	<input type="text"/>
Account	5001100000	Subcategory	<input type="text"/>	Product	<input type="text"/>
Grant	NO-GRANT	Fund Affiliate	<input type="text"/>		
PC Business Unit	<input type="text"/>	Grant Affiliate	<input type="text"/>		
Project	<input type="text"/>	Affiliate	<input type="text"/>		
Activity	<input type="text"/>	ChartField 1	<input type="text"/>		

Search Clear Cancel

Combination Code / ChartFields

Select	GL Combo Code	Account	Department	Project	Product	Fund Code	Affiliate	Grant	ChartField 1	ChartField 2
Select	000000815	5001100000	PR08010000			G4001		NO-GRANT		

Earnings Distribution

Combination Code	Distributed	Earning Code Description	Combination Code Description	Exclusion Fringe Group	Redirect Combo Code
1	1	000000815	EMPLOYEE REGULAR		

Save Notify Add Update/Display Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lecture 1: Add Position Budget Funding

Notice the **Dept Budget Deductions** and **Dept Budget Taxes** pages automatically have the **Sequence**, **Distribution %**, and **Combination Code** entered.

Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions** | Dept Budget Taxes

Set ID MDC Department PR0800000 HUMAN RESOURCES Fiscal Year 2022
Budget Begin Date 10/01/2021 Budget End Date 09/30/2022 Offset Group MDC
Default Funding Source Option Distrib over Actual Earnings

Level

Department Position Pool Jobcode **Position** Appointment + -
Position Number 59000759 HRIS Technician
Effective Date 11/15/2021 Eff Seq 0 Status Active Date Entered 03/04/2022

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1				1	000000815				100.000

Save Notify Add Update/Display Include History

Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | **Dept Budget Taxes**

Set ID MDC Department PR0800000 HUMAN RESOURCES Fiscal Year 2022
Budget Begin Date 10/01/2021 Budget End Date 09/30/2022 Offset Group MDC
Default Funding Source Option Distrib over Actual Earnings

Level

Department Position Pool Jobcode **Position** Appointment + -
Position Number 59000759 HRIS Technician
Effective Date 11/15/2021 Eff Seq 0 Status Active Date Entered 03/04/2022

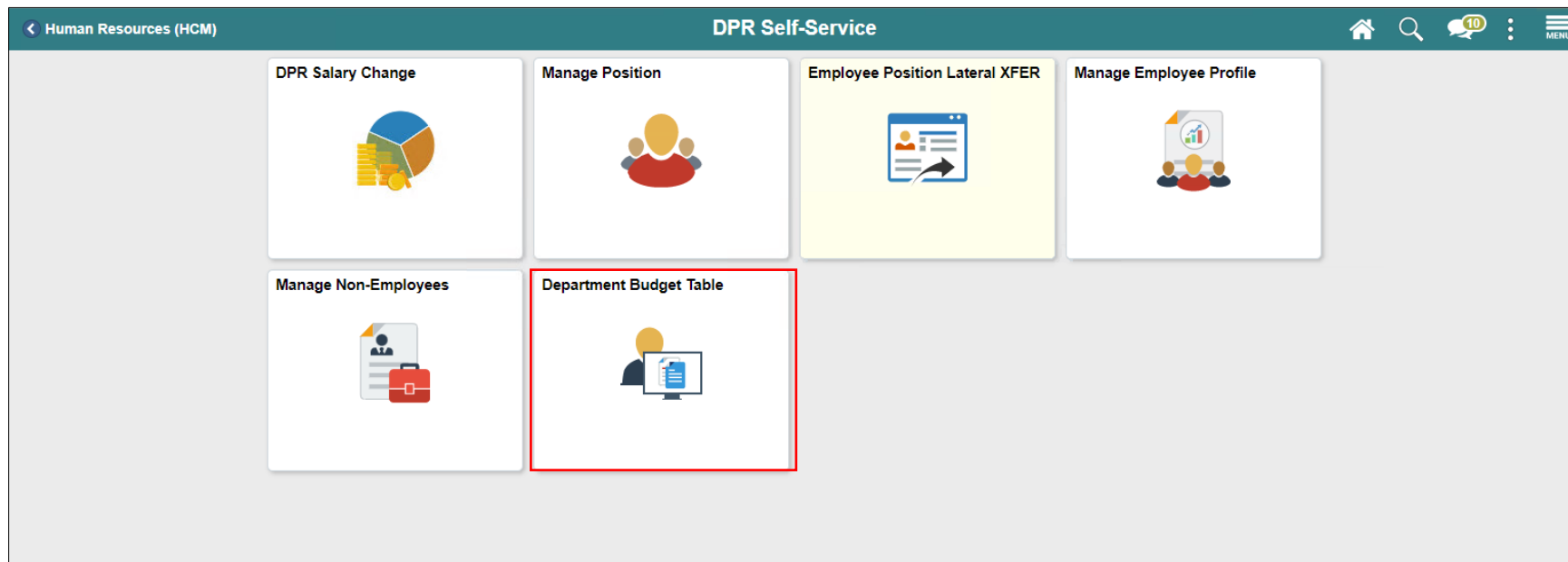
Tax Distribution

State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	000000815				100.000

Save Notify Add Update/Display Include History

Lecture 2: Update Position Budget Funding

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table USA**



Lecture 2: Update Position Budget Funding

1. Select the **Find an Existing Value** tab to update the budget funding for a position.
2. In the **Set ID** field, ensure it is set to **the specific Department's Set ID**.
3. In the **Department** field, enter the **Department ChartField** related to the position.
4. In the **Fiscal Year** field, enter the **Fiscal Year** when the new budget funding will take place.
5. In the **Position Number** field, enter the **Position Number** for the **active position** that requires the new budget funding.
6. Select **Search**.

Department Budget Table USA

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Set ID = MDC

Department begins with

Fiscal Year =

Budget Level =

Position Pool ID begins with

Job Code Set ID begins with

Job Code begins with

Position Number begins with

Empl ID begins with

Empl Record =

Include History

Search Clear Basic Search Save Search Criteria

Lecture 2: Update Position Budget Funding

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

Lecture 2: Update Position Budget Funding

1. Select the **Dept Budget Deductions** tab.
2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1** as the sequence number.
3. In the **Distribution %** field, enter the **percentage of the distribution**.

Human Resources (HCM) Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions**

Set ID MDC Department CH00000000 COMM.ACTION & HUMAN SRVC. DPT. Fiscal Year 2021
Budget Begin Date 10/01/2020 Budget End Date 09/30/2021 Offset Group MDC
Default Funding Source Option Distrib over Actual Earnings

Level

Department Position Pool Jobcode Position Appointment
Position Number 00000881 SOCIAL WORKER AIDE
Effective Date 06/28/2021 Eff Seq 0 Status Active Date Entered 02/17/2022

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1				1	000000200				100.000

Save Return to Search Notify Add Update/Display Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lecture 2: Update Position Budget Funding

4. Select the **Combination Code Description** tab in order to update the current budget funding and select the new Combination Code.
5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Deductions' tab is active. The interface shows metadata for a specific budget item, including Set ID, MDC, Department, Fiscal Year, Budget Begin/End Dates, and Default Funding Source Option. Below this, the 'Level' section is set to 'Position'. The 'Deduction Distribution' table is visible, with the 'Combination Code Description' tab selected. The table contains one row with the following data:

Plan Type	Plan	Deduction Code	Deduction Class	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1				1	000000199	EMPLOYEE REGULAR	ChartField Details

At the bottom of the interface, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', and 'Include History'. The breadcrumb trail at the bottom reads: Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes.

Lecture 2: Update Position Budget Funding

6. In the **Combination Code** field, enter the same **Combination Code** entered on the **Dept Budget Earnings** page.

7. Select **Ok**.

ChartField Common Component

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes

Search

ChartField Detail

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
SC001	CH01010101	5001100000	NO-GRANT						

Ok Cancel

8. Select the **greater than sign (>)** to expand and go to the **Dept Budget Taxes** tab.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | **Dept Budget Deductions >**

Set ID: MDC Department: CH00000000 COMM ACTION & HUMAN SRVC DPT Fiscal Year: 2021
Budget Begin Date: 10/01/2020 Budget End Date: 09/30/2021 Offset Group: MDC
Default Funding Source Option: Distrib over Actual Earnings

Level: Department Position Pool Jobcode Position Appointment

Position Number: 00000881 SOCIAL WORKER AIDE
Effective Date: 05/28/2021 Eff Seq: 0 Status: Active Date Entered: 02/17/2022

Deduction Distribution

Plan Type	Plan	Deduction Code	Deduction Class	Sequence Number	Combination Code	Combination Code Description	ChartField Details
1				1	00000200	EMPLOYEE REGULAR	ChartField Details

Save Return to Search Notify Add Update/Display Include History

Lecture 2: Update Position Budget Funding

In the **Dept Budget Taxes** page users are responsible for updating the ***Sequence Number**, **Distribution percentage** and the new **Combination Code** of the position.

1. Select the **Dept Budget Taxes** tab.
2. In the **Earnings Distribution** section, in the ***Sequence Number** field, enter **1** as the sequence number.
3. In the **Distribution %** field, enter the **percentage of the distribution**.

The screenshot shows the 'Department Budget Table USA' interface. The 'Dept Budget Taxes' tab is selected. The interface displays the following information:

- Department:** CH00000000, COMM.ACTION & HUMAN SRVC. DPT.
- Fiscal Year:** 2021
- Budget Begin Date:** 10/01/2020
- Budget End Date:** 09/30/2021
- Offset Group:** MDC
- Default Funding Source Option:** Distrib over Actual Earnings

The **Level** section shows:

- Position Number:** 00000881
- Position:** SOCIAL WORKER AIDE
- Effective Date:** 06/28/2021
- Eff Seq:** 0
- Status:** Active
- Date Entered:** 02/17/2022

The **Tax Distribution** section shows a table with the following columns:

State	Tax Class	Locality	*Sequence Number	Combination Code	Override	Funding End Date	Fiscal Year Budget Amount	Distribution %
1			1	000000200				100.000

Lecture 2: Update Position Budget Funding

4. Select the **Combination Code Description** tab in order to update the current budget funding and select the new Combination Code.
5. In the **ChartField Details** section, select the **ChartField Details** hyperlink to select the new Combination Code.

The screenshot displays the 'Department Budget Table USA' interface. The 'Dept Budget Taxes' tab is active. The main section shows 'Level' information for a Position (00000881) with the description 'SOCIAL WORKER AIDE'. Below this, the 'Tax Distribution' section is visible, with the 'Combination Code Description' tab selected. A table lists tax distribution items, with the first item having a 'Combination Code' of 000000199 and a 'ChartField Details' link highlighted in red. The interface includes navigation buttons like 'Save', 'Return to Search', and 'Notify' at the bottom.

State	Tax Class	Locality	Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	000000199	ChartField Details	EMPLOYEE REGULAR

Lecture 2: Update Position Budget Funding

6. In the **Combination Code** field, enter the same **Combination Code** entered on the **Dept Budget Earnings** page.

7. Select **OK**.

8. Select the **View All** hyperlink to view the budget funding changes.

ChartField Common Component

ChartField Details

Combination Code: 00000200

Search Options: Combination Codes

Fund Code	Department	Account	Grant	PC Business Unit	Project	Activity	Source Type	Category	Subcategory
ISC001	CH01010101	500110000	NO-GRANT						

Ok Cancel

Human Resources (HCM) Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Set ID: MDC Department: CH00000000 COMM ACTION & HUMAN SRVC. DPT Fiscal Year: 2021
Budget Begin Date: 10/01/2020 Budget End Date: 09/30/2021 Offset Group: MDC
Default Funding Source Option: Distrib over Actual Earnings

Level: 1 of 2 View All

Department Position Pool Jobcode Position Appointment

Position Number: 00000881 SOCIAL WORKER AIDE
Effective Date: 06/28/2021 Eff Seq: 0 Status: Active Date Entered: 02/17/2022

Combination Code	Locality Description	Combination Code Description	Distributed
1			1

State	Tax Class	Locality	*Sequence Number	Combination Code	ChartField Details	Combination Code Description
			1	00000200	ChartField Details	EMPLOYEE REGULAR

Save Return to Search Notify Add Update/Display Include History

Lecture 2: Update Position Budget Funding

9. Review the changes and select **Save**.

Human Resources (HCM) Department Budget Table USA

Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | **Dept Budget Taxes**

Set ID MDC Department CH00000000 COMM.ACTION & HUMAN SRVC. DPT. Fiscal Year 2021
Budget Begin Date 10/01/2020 Budget End Date 09/30/2021 Offset Group MDC
Default Funding Source Option Distrib over Actual Earnings

Level 1-2 of 2 View 1

Department Position Pool Jobcode **Position** Appointment + -
Position Number 00000881 SOCIAL WORKER AIDE
Effective Date 06/28/2021 Eff Seq 0 Status Active Date Entered 02/17/2022

Tax Distribution 1-1 of 1

State	Tax Class	Locality	Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	000000200	ChartField Details	EMPLOYEE REGULAR + -

Department Position Pool Jobcode **Position** Appointment + -
Position Number 00000881 SOCIAL WORKER AIDE
Effective Date 10/01/2020 Eff Seq 0 Status Active Date Entered 07/01/2021

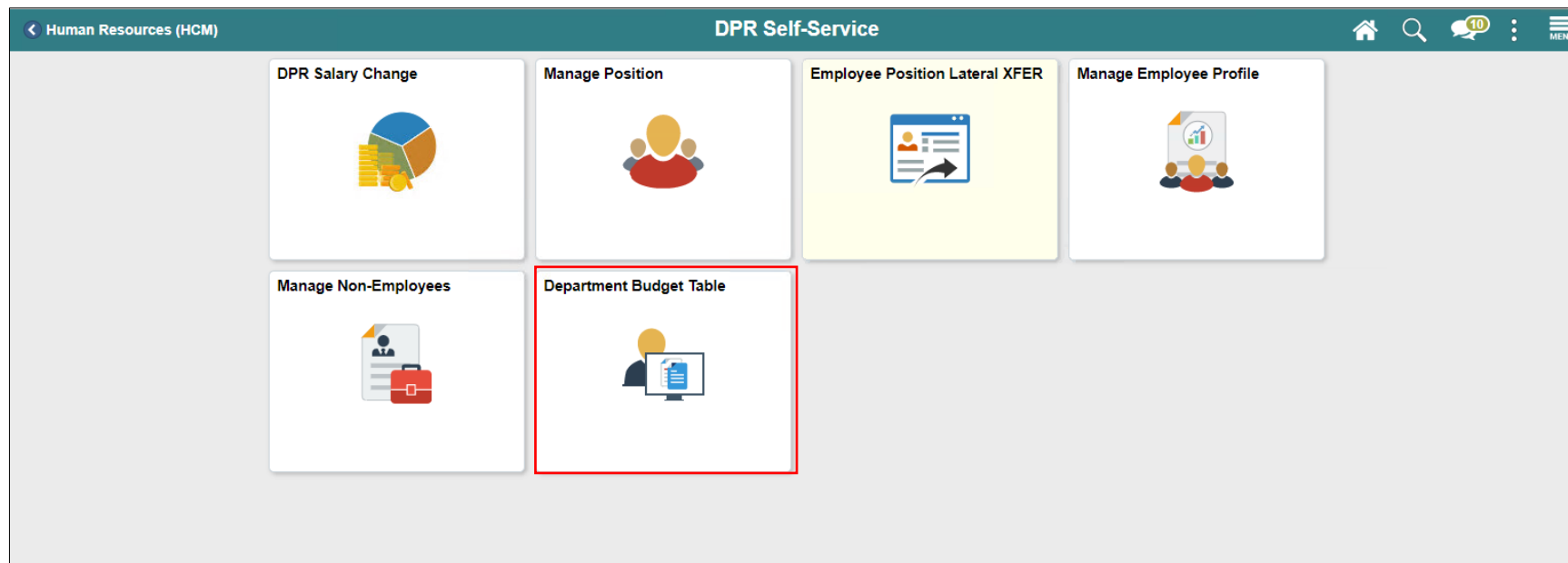
Tax Distribution 1-1 of 1

State	Tax Class	Locality	Sequence Number	Combination Code	ChartField Details	Combination Code Description
1			1	000000199	ChartField Details	EMPLOYEE REGULAR + -

Save Return to Search Notify Add Update/Display Include History

Lecture 3: Inactive Position Budget Funding

Navigate to Department Budget Table USA: **Human Resources (HCM) > DPR Self-Service > Department Budget Table USA**



Lecture 3: Inactive Position Budget Funding

1. Select the **Find an Existing Value** tab to update the budget funding for a position.
2. In the **Set ID** field, ensure it is set to **the specific Department's Set ID**.
3. In the **Department** field, enter the **Department ChartField** related to the position.
4. In the **Fiscal Year** field, enter the **Fiscal Year** when the new budget funding will take place.
5. In the **Position Number** field, enter the **Position Number** for the active position that requires the new budget funding.
6. Select **Search**.

The screenshot shows the 'Department Budget Table USA' search interface. At the top, there is a navigation bar with a back arrow and 'HOME' on the left, and 'Department Budget Table USA' on the right. Below the navigation bar, the title 'Department Budget Table USA' is displayed, followed by the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (which is selected and highlighted with a red box) and 'Add a New Value'. Below the tabs is a section titled 'Search Criteria' with a dropdown arrow. This section contains several search fields: 'Set ID' (a dropdown menu with 'MDC' selected and a search icon), 'Department' (a dropdown menu with 'begins with' selected and a search icon), 'Fiscal Year' (a dropdown menu), 'Budget Level' (a dropdown menu), 'Position Pool ID' (a dropdown menu with 'begins with' selected and a search icon), 'Job Code Set ID' (a dropdown menu with 'begins with' selected and a search icon), 'Job Code' (a dropdown menu with 'begins with' selected and a search icon), 'Position Number' (a dropdown menu with 'begins with' selected and a search icon, highlighted with a red box), 'Empl ID' (a dropdown menu with 'begins with' selected and a search icon), and 'Empl Record' (a dropdown menu with a search icon). At the bottom of the search criteria section, there is a checkbox labeled 'Include History'. Below the search criteria section are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Basic Search' (with a magnifying glass icon). To the right of the 'Basic Search' button is a link 'Save Search Criteria'.

Lecture 3: Inactive Position Budget Funding

Set ID	Department
AVIAT	Aviation Department
PH	Public Housing & Community
SF	CareerSource South Florida
WASD1	Water & Sewer Department
MDC	All other Departments

INFORMS Fiscal Year	Fiscal Year Dates
2021	FY 20-21 (10/1/20 – 9/30/21)
2022	FY 21-22 (10/1/21 – 9/30/22)
2023	FY 22-23 (10/1/22 – 9/30/23)

Lecture 3: Inactive Position Budget Funding

7. Select the **Dept Budget Earnings** tab.
8. On the **Level** Section, select the **plus sign (+)** to enter the ***Effective Date** which is the **date the of budget funding activation**.

NOTE: The Effective Date must be the date of the end of the Pay Period you intend to inactivate plus 1 and must fall within the Budget Begin Date and Budget End Date.

9. In the ***Status** field, select **Inactive**.
10. Select **Save**.

Department Budget Table USA

Dept Budget Date | Dept Budget Defaults | **Dept Budget Earnings** | Dept Budget Deductions >

Set ID MDC Department CH00000000 COMM.ACTION & HUMAN SRVC. DPT. Fiscal Year 2021
Budget Begin Date 10/01/2020 Offset Group MDC Budget Cap
Budget End Date 09/30/2021 Per Budget Level Per Earn/Tax/Ded
Default Funding Source Option Distrib over Actual Earnings

Level 1 of 2 View All

Department Position Pool Jobcode Position Appointment + -

Position Number 00000881
*Effective Date 08/09/2021 Eff Seq 0 *Status Inactive Date Entered 02/25/2022
Budget Level Cap 9,999,999,999.00 *Currency USD

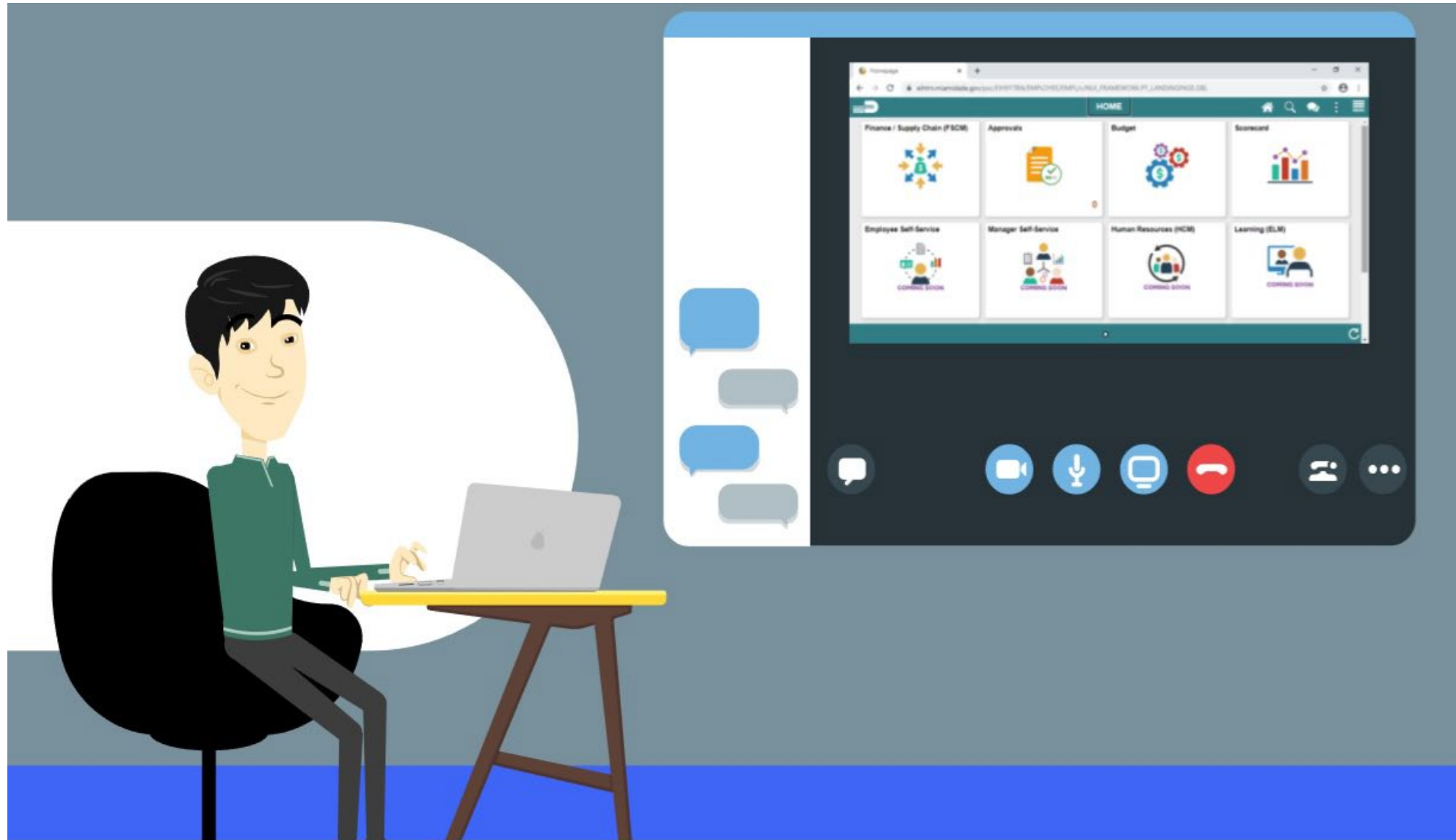
Earnings Distribution 1-1 of 1

Earnings Code	*Sequence Number	Combination Code	Combination Code Description	ChartField Details
1	1	00000200	EMPLOYEE REGULAR	ChartField Details + -

Save Return to Search Notify Add Update/Display Include History

Dept Budget Date | Dept Budget Defaults | Dept Budget Earnings | Dept Budget Deductions | Dept Budget Taxes

Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Now that you have completed the lesson, you have:

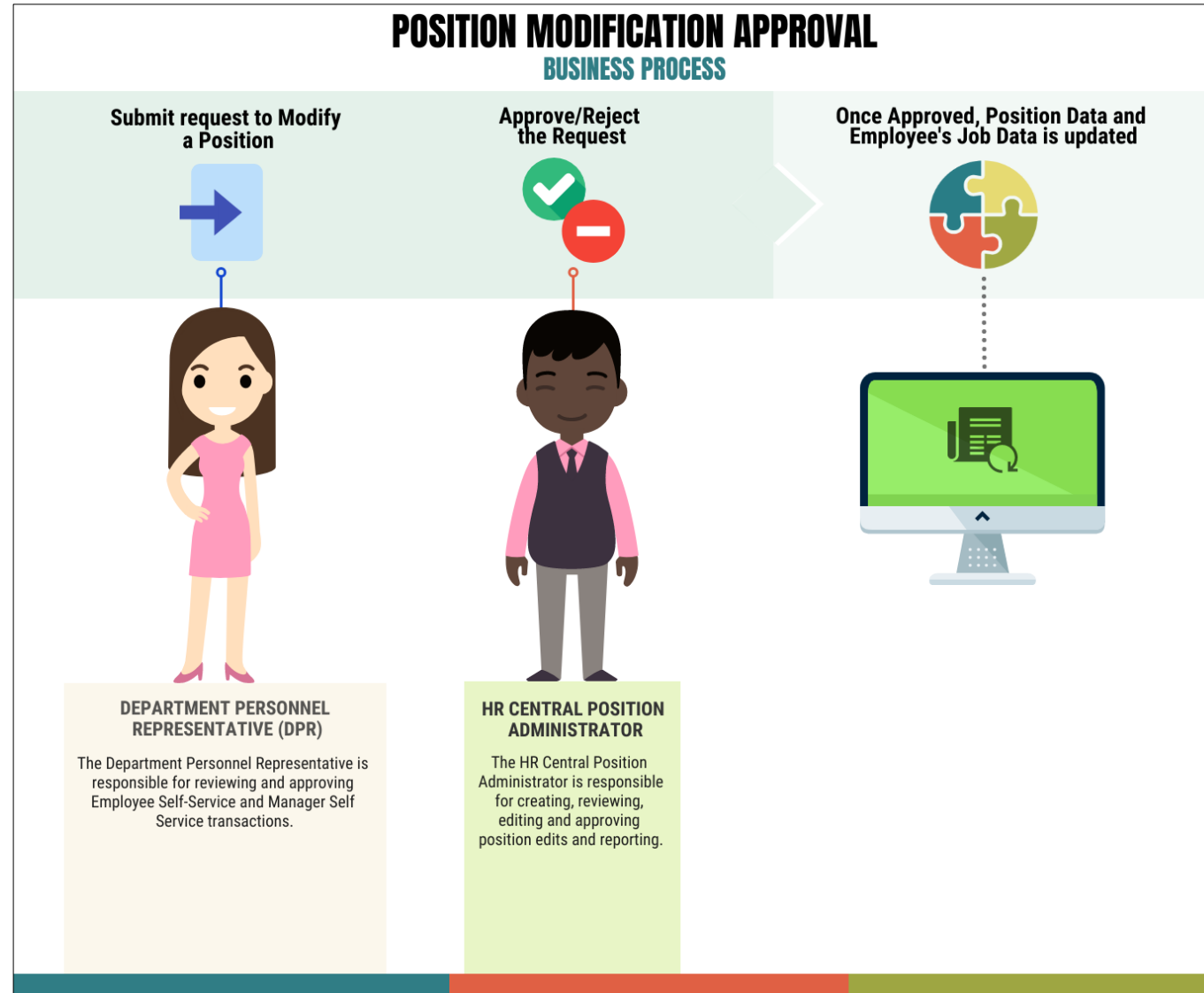
- Learned how Department budget funding is established for new positions
- Learned how to update Department budget funding on existing positions.
- Learned how to inactivate Department budget funding for a position.

Lesson 3: Submitting Position Change

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

- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

Lesson 3: Submitting Position Change



Lesson 3: Key Terms

Term	Definition
Sandwich Row	Position effective date lands in between job effective dates, position row will not be added. The Job record will be manually updated by the HR Compensation Administrator.
Top of Stack	Position effective date is equal to or greater than Job effective date, system automatically updates Job record once approved.

Lecture 1: Modify Position

The DPR has the ability to request modifications to positions that have been fully approved. Some modifications will affect the effective date such as changing the position from temporary to regular; inactivating a position; changing the reporting structure; and updating the position status.

Lecture 1: Modify Position

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being modified**.
2. Select **Search**.

The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. The page title is 'View Manage/Create Position'. On the left, there is a search form with the following fields:

- Position Number:** A text input field highlighted with a red border.
- Description:** A text input field.
- Position Status:** A dropdown menu.
- Reports To Position Number:** A text input field.

At the bottom of the search form are two buttons: a green 'Search' button and a grey 'Clear' button. To the right of the search form is a '+ Add' button. A green pause icon is visible at the bottom right of the search form area.

Lecture 1: Modify Position

3. Select the **position being modified**.

The screenshot shows the 'Manage/Create Position' interface. On the left, there is a search sidebar with fields for Position Number (00006777), Description, Position Status, and Reports To Position Number. Below these are filters for Business Unit, Company, Department, Status, and Job Code. The main area displays 'View Manage/Create Position' with '1 results found'. A table below shows the search results, with the first row highlighted in red:

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00006777	CLERK 3	00006762	FR	MDC	FR00000000	Active	000012	1/1

4. Select the **Plus Sign (+)** above the **Effective Date** to modify the position with a new effective date.

The screenshot shows the 'Position Details' interface for Position Number 00006777. It displays Headcount Status as 'Filled' and Current Head Count as '1 of 1'. Below this is a table with one row, and a plus sign (+) is highlighted in red above the Effective Date column:

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain

Lecture 1: Modify Position

Listed below are some of the **common Modification Reason Codes** users will use when making modifications.

Reason Code	Description
FTE	Change from Temporary to Regular
INA	Position Inactivated (Must have an effective date and no incumbents in the position)
RTC	Reports to Change (Must have an effective date and incumbents in the position)
STA	Position Status Change
UPD	Position Data Update

Lecture 1: Modify Position

5. In the ***Effective Date**, enter the **new effective date**.
6. In the **Reason Code** field, select **RTC (Reports to Change)** as the reason.
7. Select **Continue**

Request Details

Cancel Continue

*Effective Date 01/05/2022

Effective Sequence 0

Reason Code RTC Reports To Change

8. In the **Work Location** section, in the **Reports To** field, enter the **position number of the new immediate supervisor**

Work Location

*Reg Region USA United States *Company MDC Miami Dade County

*Department FR00000000 FIRE DEPARTMENT

Location FR00000056 9300 NW 41ST ST

Reports To 00007345 CLERK 4 [View Current Incumbents](#)

Supervisor Level 12 Supervisor Classes

Lecture 1: Modify Position

9. Review the requested modifications and select **Next**.

10. Review **Additional Information** page (Step 2 of 5) and select **Next**.

11. Review **Attachments** page (Step 3 of 5) and select **Next**.

NOTE: Attachments for this process are optional.

The screenshot displays the 'Manage Position' web application interface. The top header shows 'Exit' and 'Manage Position'. Below the header, the following information is displayed: Position Number: 00006777, Headcount Status: Filled, and Current Head Count: 1 of 1. On the right side of the header, there are navigation buttons for '< Previous' and 'Next >'. The main content area is divided into a left sidebar and a main panel. The sidebar contains five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited), 4. Budget Incumbents (Visited), and 5. Review and Submit (Not Started). The main panel is titled 'Step 3 of 5: Attachments' and contains the following information: Effective Date: 01/05/2022, Reason Code: RTC - Reports To Change, Effective Sequence: 0, and Approval Status: Not Available. Below this information, there is a section titled 'Attachments' with the text 'You have not added any Attachments.' and an 'Add Attachment' button.

Lecture 1: Modify Position

12. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

13. Review **Budget Incumbents** page (Step 4 of 5) and select **Next**.

Manage Position

Position Number 00006777
Headcount Status Filled
Current Head Count 1 of 1

< Previous **Next** >

Step 4 of 5: Budget Incumbents

Effective Date 01/05/2022
Reason Code RTC Reports To Change
Effective Sequence 0
Approval Status Not Available

Current Budget

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

Incumbents

Update Incumbents Yes No

Include Salary Plan/Grade No

Force Update for Title Changes No

Current Incumbents 1 row

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Glinda King	00198155	0	Full-Time	80.00	12/28/2020	Data Change	Conversion	N	Job Data

Related Information

[View Position](#)
[Position History](#)

Lecture 1: Modify Position

14. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.

15. Select **Submit** once the requested modifications are ready for processing

The screenshot displays the 'Manage Position' interface. At the top, it shows 'Position Number 00006777', 'Headcount Status Filled', and 'Current Head Count 1 of 1'. A navigation bar includes a 'Previous' button and a highlighted 'Submit' button. The main content area is titled 'Step 5 of 5: Review and Submit' and contains the following details:

- Effective Date: 01/05/2022
- Effective Sequence: 0
- Reason Code: RTC Reports To Change
- Approval Status: Not Available

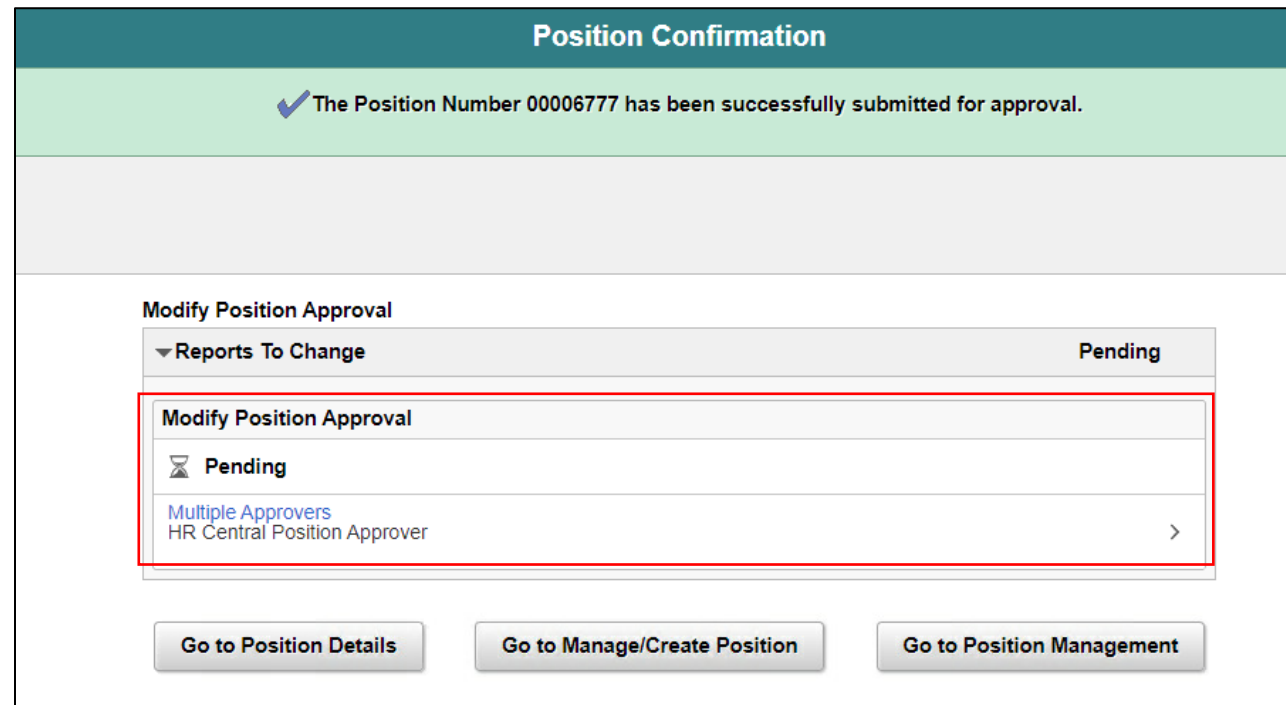
A 'Summary Of Changes' table is highlighted with a red border, showing the following data:

Description	Proposed Value	Current Value
Reason Code	RTC	CNV
Action Date	2022-01-10	2014-10-30
Reports To Position Number	00007345	00006762


Lecture 1: Modify Position

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**. Once fully approved the Position Data as well as the employee's Job Data is updated accordingly.

NOTE: Once position is approved, the DPR will receive notification that the requested position changes have taken effect.



The screenshot displays the 'Position Confirmation' interface. At the top, a green banner contains a checkmark and the text: 'The Position Number 00006777 has been successfully submitted for approval.' Below this, the 'Modify Position Approval' section is visible, featuring a table with a 'Reports To Change' column and a 'Pending' status column. A red box highlights a row in the table with the following details:

Reports To Change	Pending
Modify Position Approval	
 Pending	
Multiple Approvers HR Central Position Approver	>

At the bottom of the screen, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

Lecture 2: Validate Modification Request

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being modified**.
2. Select **Search**.

The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search form titled 'New Search' with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. On the right, the 'View Manage/Create Position' section contains a '+ Add' button. A mobile navigation icon is visible at the bottom right of the search form.

Lecture 2: Validate Modification Request

3. Select the **position being validated**.
4. Select the **Greater Than (>) button** to see full details of the position.

Search Results Position Details

Position Number 00006777
Headcount Status Filled
Current Head Count 1 of 1 Clone

2 rows

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain		
01/05/2022	0	Reports To Change	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain		>
01/01/1901	0	Position Data Conversion	Fire Rescue	FIRE DEPARTMENT	Clerk 3	9300 NW 41ST ST	Approved	Approval Chain		>

Lecture 2: Validate Modification Request

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the HCM Job Data search interface. The left sidebar has 'Job Data' selected. The main area has 'Find an Existing Value' and 'Keyword Search' buttons. The 'Search Criteria' section includes fields for 'Empl ID', 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown and an input field. The 'Empl ID' field is highlighted with a red box. The 'Search' button is also highlighted with a red box.

Lecture 2: Validate Modification Request

4. Select the **Job Information** tab to see the reporting change.
NOTE: Top of stack record will see current.

The screenshot displays the 'Job Information' tab for employee Glinda King (Empl ID: 00198155). The 'Job Information Details' section shows the following information:

- Effective Date:** 01/05/2022
- Job Code:** 000012 (Clerk 3)
- Entry Date:** 12/22/2003
- Supervisor Level:** 12
- Supervisor ID:** 00007345 (CLERK 4 00158740 Nola Foster)
- Regular/Temporary:** Regular
- Empl Class:** Perm
- Regular Shift:** Not Applicable
- Classified Ind:** Classified

The 'Standard Hours' section shows 80.00 hours, Biweekly work period, and FTE of 1.000000. The 'Contract Number' section is empty. The 'Current' checkbox is checked.

Navigation tabs at the bottom include: Job Data, Employment Data, Earnings Distribution, Benefits Program Participation, and Creditable Adjusted Dates. Action buttons include Save, Return to Search, Notify, Refresh, Update/Display, and Include History.

Lecture 3: Inactivate Position

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being inactivated**.
2. Select **Search**.

NOTE: For historical purposes, no fields in this process are to be modified except the Update Incumbents toggle in Budgeted Incumbents which is Step 4 of the process.

The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search form titled 'New Search' with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. On the right, the 'View Manage/Create Position' section contains a '+ Add' button. The interface is framed by a teal header with a back arrow and the text 'DPR Self-Service' on the left, and 'Manage/Create Position' on the right.

Lecture 3: Inactivate Position

3. Select the **position being inactivated**.

NOTE: Ensure the Current Head Count is zero when deactivating a position.

View Manage/Create Position
1 results found.

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00003294	MANAGER ITD ADMINISTRATIVE SER	00018431	IT	MDC	IT00000000	Active	001755	0/1

Lecture 3: Inactivate Position

4. Select the **Plus Sign (+)** above the **Effective Date** to modify the position with a new effective date.

Search Results Position Details

Position Number 00003294
Headcount Status Open
Current Head Count 0 of 1 Clone

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager Itd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain

5. In the ***Effective Date** field, enter the **new effective date**.
6. In the **Reason Code** field, select **INA (Position Inactivated)** as the reason.
7. Select **Continue**.

Cancel Request Details Continue

*Effective Date 01/05/2022

Effective Sequence 0

Reason Code INA Position Inactivated

Lecture 3: Inactivate Position

8. In the **Position Information** section, in the ***Status** field, select **Inactive**.

Step 1 of 5: Position Data

Effective Date 01/05/2022 Reason Code INA Position Inactivated
Effective Sequence 0 Approval Status Not Available

Position Information

*Filed Status Max Head Count
***Status** Non-Mayoral No
Budgeted Position Yes Senior Management No

9. Review the requested modifications and select **Next**.

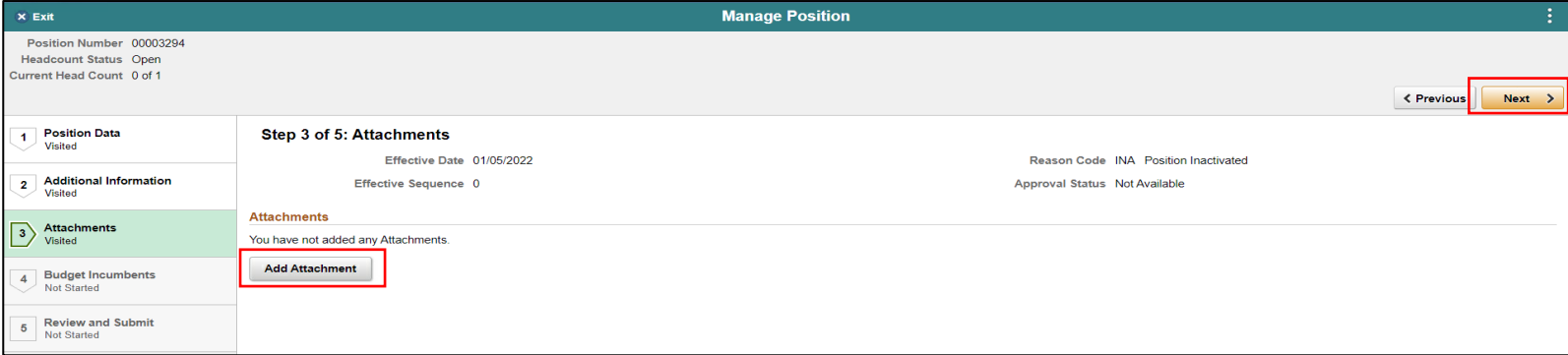
10. Review **Additional Information** page (Step 2 of 5) and select **Next**.

Lecture 3: Inactivate Position

11. On the **Attachments** page (Step 3 of 5) attach any supporting documentation regarding the request.

12. Select **Attachment**.

Note: Attachments for this process are **required**.



The screenshot displays the 'Manage Position' web application interface. The top header shows 'Exit' and 'Manage Position'. Below the header, the following information is displayed: Position Number 00003294, Headcount Status Open, and Current Head Count 0 of 1. On the right side, there are navigation buttons for '< Previous' and 'Next >', with the 'Next >' button highlighted in red. The main content area is divided into a left sidebar and a main panel. The sidebar contains five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Visited and highlighted in green), 4. Budget Incumbents (Not Started), and 5. Review and Submit (Not Started). The main panel is titled 'Step 3 of 5: Attachments' and contains the following information: Effective Date 01/05/2022, Reason Code INA Position Inactivated, Effective Sequence 0, and Approval Status Not Available. Below this information, there is a section titled 'Attachments' with the text 'You have not added any Attachments.' and a red-bordered button labeled 'Add Attachment'.

13. Select **My Device**.

14. Select the **file being attached**.

15. Select **Upload**.

16. Select **Done**.

17. In the **Description** field, enter a **brief description of the supporting documentation**.

18. Select **Next**.

Lecture 3: Inactivate Position

19. In the **Budget Incumbents** page (Step 4 of 5) in **Update Incumbents** field select **No**.
20. Select **Next**.

The screenshot displays the 'Manage Position' interface. At the top, it shows 'Position Number 00003294', 'Headcount Status Open', and 'Current Head Count 0 of 1'. A navigation bar includes '< Previous' and 'Next >' buttons, with 'Next >' highlighted in red. The main content area is titled 'Step 4 of 5: Budget Incumbents' and contains the following information:

- Effective Date: 01/05/2022
- Effective Sequence: 0
- Reason Code: INA Position Inactivated
- Approval Status: Not Available

Current Budget

Earnings	0.000	Cdn Tax	0.000
Deductions	0.000	Total	0.00
Tax	0.000		

Incumbents

Update Incumbents No

Include Salary Plan/Grade: No
Force Update for Title Changes: No

Current Incumbents
No Incumbents to display.

Lecture 3: Inactivate Position

21. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly.
22. Select **Submit** once the requested modifications are ready for processing.

Manage Position

Position Number 00003294
Headcount Status Open
Current Head Count 0 of 1

Step 5 of 5: Review and Submit

Effective Date 01/05/2022
Effective Sequence 0

Reason Code INA Position Inactivated
Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Status as of Effective Date	I	A
Reason Code	INA	CNV
Action Date	2022-01-10	2019-08-16
Update Incumbents	N	Y

Position Confirmation

✓ The Position Number 00003294 has been successfully submitted for approval.

Modify Position Approval

Position Inactivated Pending

Modify Position Approval

⌚ Pending

Multiple Approvers
HR Central Position Approver >

Go to Position Details Go to Manage/Create Position Go to Position Management

Lecture 4: Validate Inactive Position

Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the position number being inactivated**.
2. Select **Search**.

The screenshot shows the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search form with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. On the right, the main area is titled 'View Manage/Create Position' and contains a '+ Add' button. The top navigation bar shows 'DPR Self-Service' and 'Manage/Create Position'.

Lecture 4: Validate Inactive Position

3. Select the position being validated.

The screenshot displays the 'Manage/Create Position' interface. On the left, there are search filters for Position Number (00003294), Description, Position Status, Reports To Position Number, Business Unit (IT), Company (MDC), Department (IT00000000), Status (Inactive), and Job Code (001755). The main area shows 'View Manage/Create Position' with '1 results found.' and a table with one row highlighted in red:

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
00003294	MANAGER ITD ADMINISTRATIVE SER	00018431	IT	MDC	IT00000000	Inactive	001755	0/1





Lecture 4: Validate Inactive Position

4. Select the **Greater Than (>)** button to see full details of the position.

Search Results Position Details

Position Number 00003294
Headcount Status Open
Current Head Count 0 of 1 Clone

2 rows

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain	
01/05/2022	0	Position Inactivated	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager ltd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain	 
01/01/1901	0	Position Data Conversion	Information Technology	INFORMATION TECHNOLOGY DEPT	Manager ltd Administrative Svc	5680 SW 87 AVE	Approved	Approval Chain	 

Lecture 4: Validate Inactive Position

The position is successfully Inactivated.

View Position

Position Number 00003294
Headcount Status Open
Current Head Count 0 of 1

Effective Date 01/05/2022
Effective Sequence 0

Reason INA Position Inactivated
Approval Status Approved

Position Information

Position Status Approved
Status Inactive
Action Date 01/05/2022
Key Position No
Budgeted Position Yes
Senior Management No

Max Head Count 1
Status Date 03/20/2019
Job Sharing Permitted No
Non-Mayoral No

Job Information

Business Unit IT Information Technology
Job Code 001755
Regular/Temporary Regular
Regular Shift Not Applicable
Title MANAGER ITD ADMINISTRATIVE SER

Manager Level All Other Positions
Full/Part Time Full-Time
Union Code L Non Bargaining
Short Title MGRITDADSV
Description MANAGER ITD ADMINISTRATIVE SER

Work Location

Reg Region USA United States
Department IT00000000 INFORMATION TECHNOLOGY DEPT
Location ID00000705 5680 SW 87 AVE
Reports To 00018431 DIV DIR ITD View Current Incumbents
Supervisor Lvl

Company MDC Miami Dade County
Dot-Line
Security Clearance

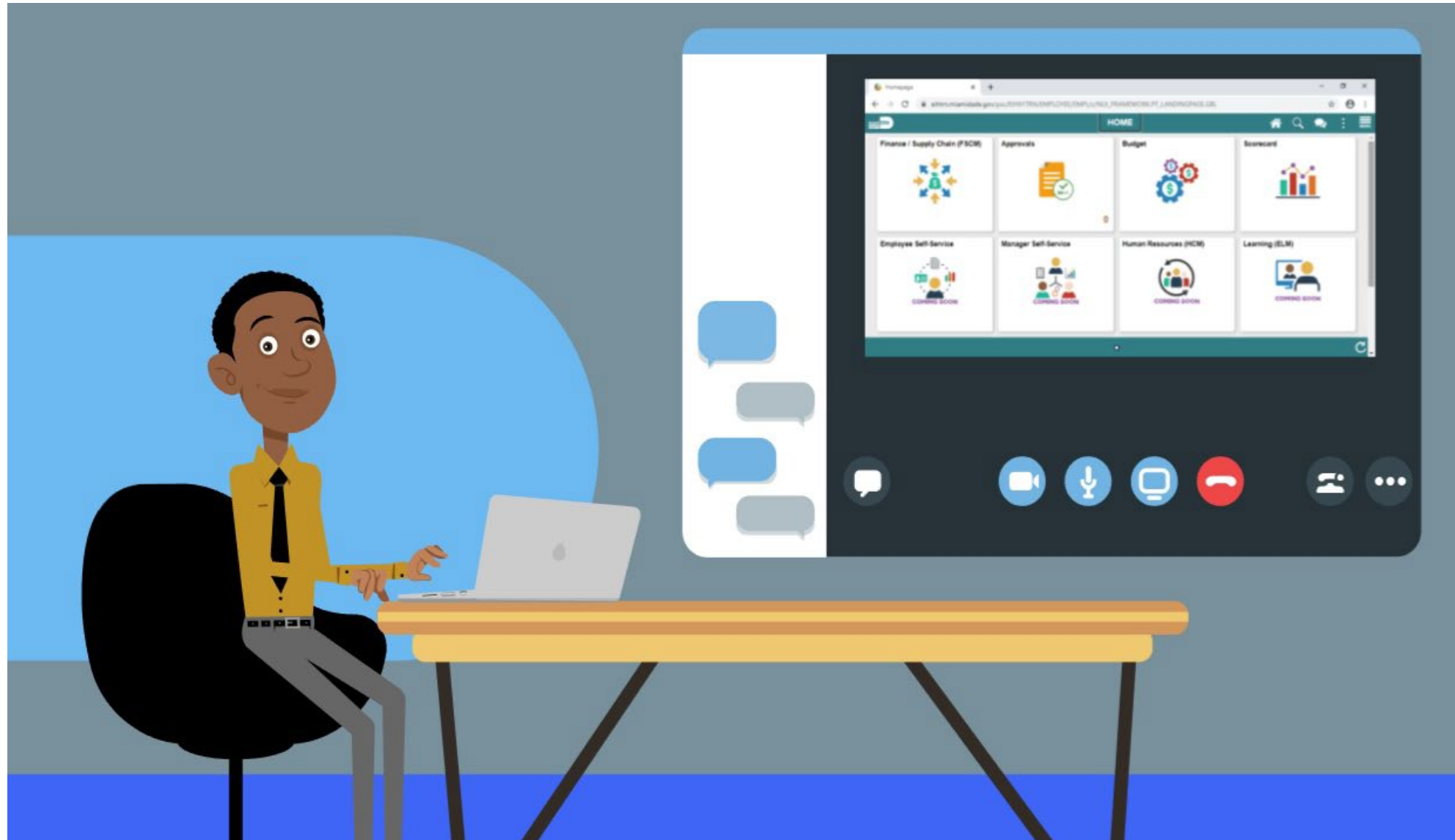
Salary Plan Information

Pay Plan
Salary Admin Plan PAYG
Standard Hours 80.00
Work Period B Biweekly

Grade 058
Step
Mon Tue Wed Thu Fri Sat Sun

USA
Specific Information
Education and Government
Budget and Incumbents
Summary of Changes
Attachments

Lesson 3: Activities and Exercises



Lesson 3: Lesson Summary

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

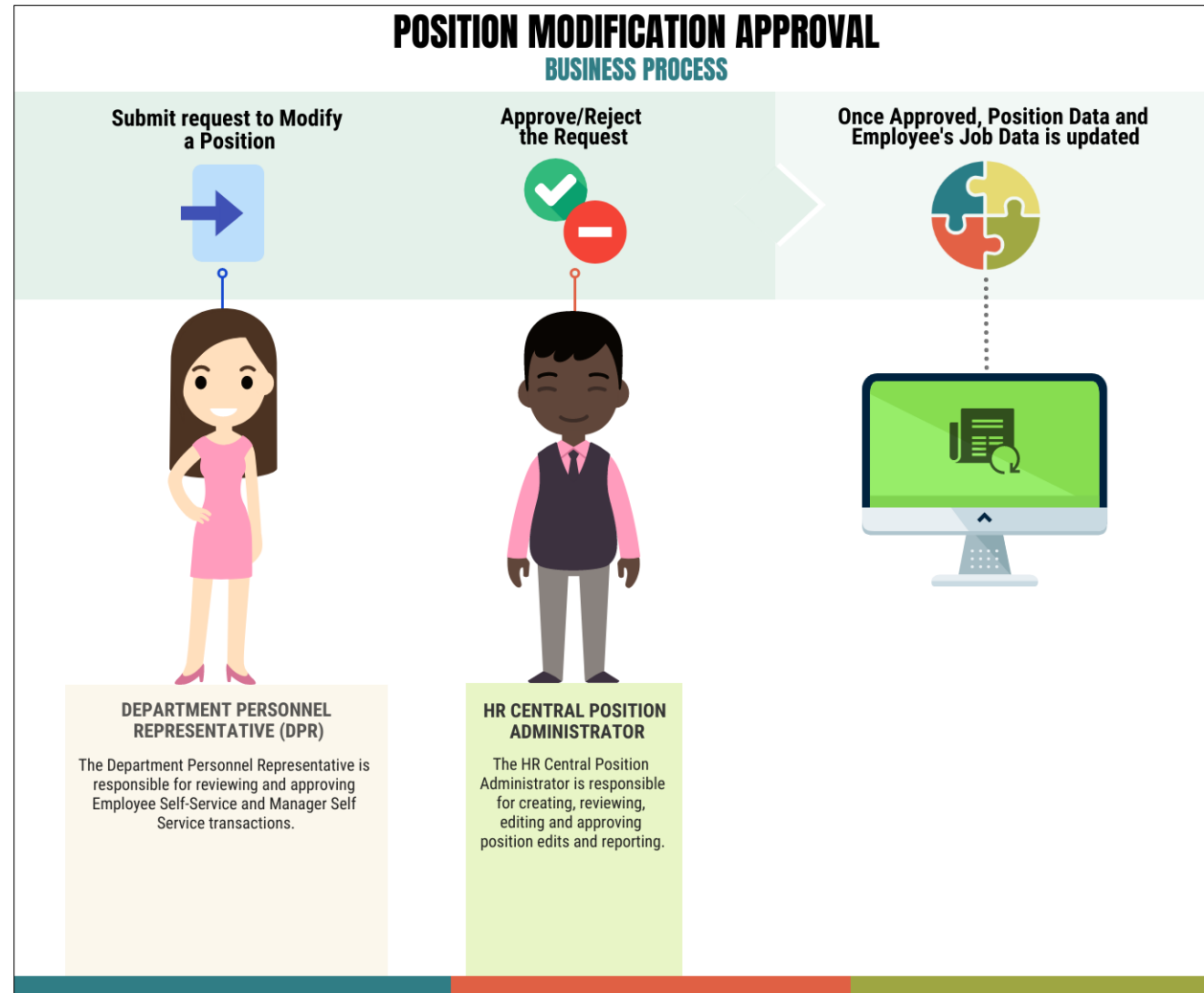
- Modify a position
- Validate the Modification Request
- Inactivate a position
- Validate the Inactive Request

Lesson 4: Submit Job Data Changes that Impact Benefits

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

- Update a temporary employee to regular status in order for them to obtain benefits

Lesson 4: Submit Job Data Changes that Impact Benefits



Lecture 1: Submit Job Data Changes that Impact Benefits

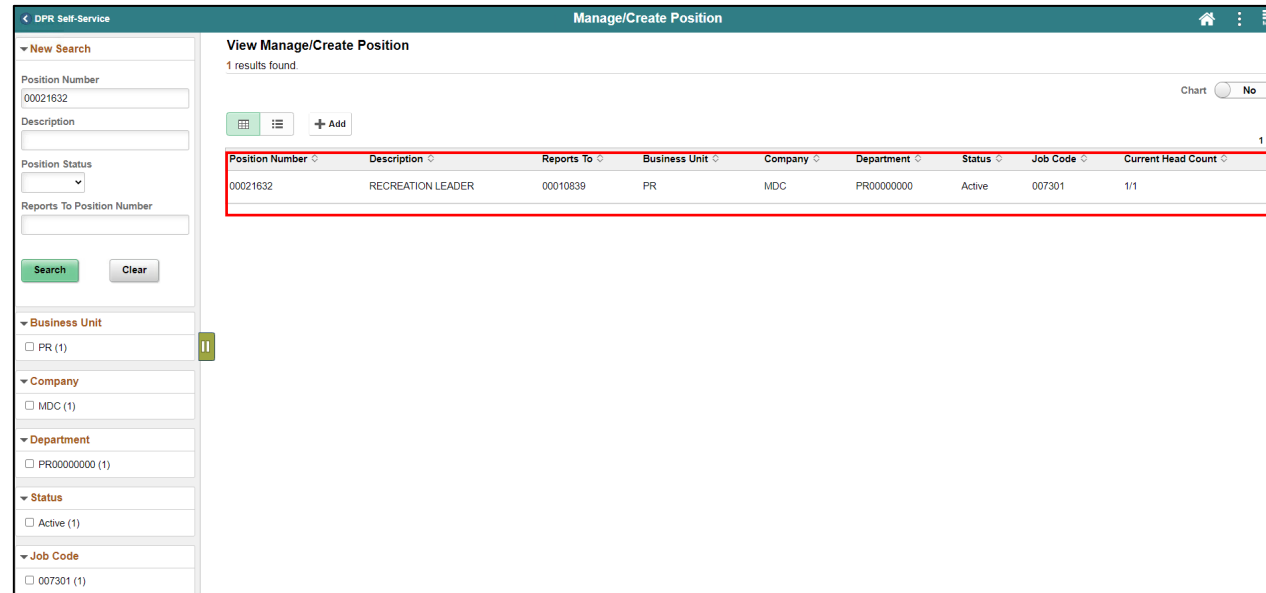
Navigate to Manage Position: **Human Resources (HCM) > DPR Self-Service > Manage Position**

1. In the **Position Number** field, enter **the part-time/temporary position number being modified**.
2. Select **Search**.

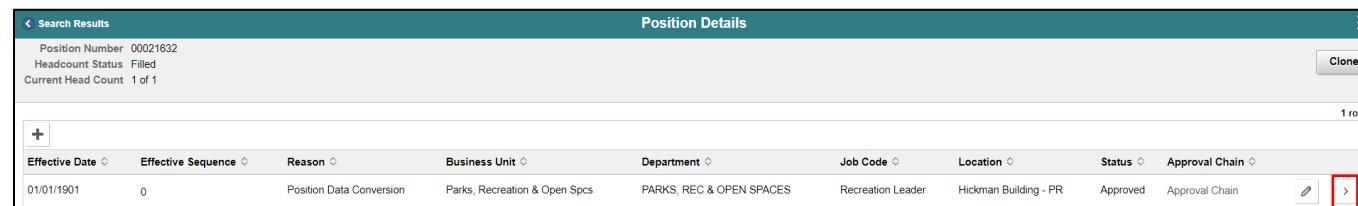
The screenshot displays the 'DPR Self-Service' interface for 'Manage/Create Position'. On the left, there is a search form with the following fields: 'Position Number' (highlighted with a red box), 'Description', 'Position Status' (a dropdown menu), and 'Reports To Position Number'. Below these fields are 'Search' and 'Clear' buttons. On the right, the 'View Manage/Create Position' section contains a '+ Add' button. The interface has a teal header bar with a back arrow, 'DPR Self-Service', and 'Manage/Create Position' text.

Lecture 1: Submit Job Data Changes that Impact Benefits

3. Select the **position being modified**.



4. Select the **Plus Sign (+)** above the **Effective Date** to **modify the position with a new effective date**.



Lecture 1: Submit Job Data Changes that Impact Benefits

5. In the ***Effective Date**, enter the **new effective date**.
6. In the **Reason Code** field, select **FTE (Change from Temp to Reg)** as the reason.
7. Select **Continue**

The screenshot shows a 'Request Details' form. At the top left is a 'Cancel' button and at the top right is a 'Continue' button. The main content area contains two fields highlighted with red boxes: the '*Effective Date' field with the value '01/24/2022' and a calendar icon, and the 'Reason Code' field with the value 'FTE' and a search icon. Below the Reason Code field, the text 'Change from Temp to Reg' is visible. The 'Effective Sequence' is set to '0'.

8. In the **Job Information** section, in the ***Regular/Temporary** field, select **Regular** from the drop down.
9. In the ***Full/Part Time** field, select **Full-Time**.

The screenshot shows the 'Job Information' section of a form. It contains several fields: '*Business Unit' (PR), '*Job Code' (007301), '*Regular/Temporary' (Regular), '*Regular Shift' (Not Applicable), and '*Title' (RECREATION LEADER). On the right side, there are fields for '*Full/Part Time' (Full-Time), 'Union Code' (H), 'Short Title' (RECLEADER), and 'Description' (NATURE OF WORK: This is specialized recreation work in planning...). The '*Regular/Temporary' and '*Full/Part Time' fields are highlighted with red boxes.

Lecture 1: Submit Job Data Changes that Impact Benefits

10. Review the requested modifications and select **Next**.

11. In the **Additional Information** page (Step 2 of 5), in the **FTE** field, enter **1.00**.

12. Select **Next**.

NOTE: When changing a Part-Time position to Full-time it is necessary to adjust the FTE to 1.

The screenshot displays the 'Manage Position' interface. At the top, it shows 'Position Number 00021632', 'Headcount Status Filled', and 'Current Head Count 1 of 1'. The main content area is titled 'Step 2 of 5: Additional Information'. On the left, a navigation pane shows five steps: 1. Position Data (Visited), 2. Additional Information (Visited), 3. Attachments (Not Started), 4. Budget Incumbents (Not Started), and 5. Review and Submit (Not Started). The 'Additional Information' section includes fields for 'Effective Date' (01/24/2022), 'Reason Code' (FTE - Change from Temp to Reg), 'Effective Sequence' (0), and 'Approval Status' (Not Available). Below this, the 'Education and Government' section contains a search field for 'Position Pool ID', a dropdown for '*Pre-Encumbrance Indicator' (set to 'Encumber Immediately'), a dropdown for '*Encumber Salary Option' (set to 'Salary Step'), a text field for 'Encumber Salary Amount' (0.000), and a dropdown for '*Classified Indicator' (set to 'Temporary'). A radio button for 'Adds to FTE Actual Count' is set to 'No'. The 'FTE' field, located in the middle-right area, is highlighted with a red box and contains the value '1.000000'. On the right side, there is a 'Related Information' panel with a 'View Position' link and a 'Position History' link. At the top right of the main content area, there are '< Previous' and 'Next >' navigation buttons.

Lecture 1: Submit Job Data Changes that Impact Benefits

NOTE: Attachments for this process are optional.

13. Review **Attachments** page (Step 3 of 5) and select **Next**.

14. Ensure the **Update Incumbents** toggle is set to **Yes** since this position has incumbents.

NOTE: When there are no incumbents in the position it is required to have the Update Incumbents field set to No before submitting the request.

15. Review **Budget Incumbents** page (Step 4 of 5) and select **Next**.

The screenshot displays the 'Manage Position' interface. The top header shows 'Position Number: 00021632', 'Headcount Status: Filled', and 'Current Head Count: 1 of 1'. The main content area is titled 'Step 4 of 5: Budget Incumbents' and includes the following sections:

- Effective Date:** 01/24/2022
- Reason Code:** FTE Change from Temp to Reg
- Approval Status:** Not Available
- Current Budget:**
 - Earnings: 0.000
 - Deductions: 0.000
 - Tax: 0.000
 - Cdn Tax: 0.000
 - Total: 0.00
- Incumbents:**
 - Update Incumbents:** Yes
 - Include Salary Plan/Grade:** No
 - Force Update for Title Changes:** No
- Current Incumbents:** A table with 1 row:

Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
Kristy Hobbs	00312190	0	Part-Time	59.00	12/28/2020	Data Change	Conversion	N	Job Data

The 'Next' button in the top right corner is highlighted with a red box. The 'Update Incumbents' toggle and the 'Current Incumbents' table are also highlighted with red boxes.

Lecture 1: Submit Job Data Changes that Impact Benefits

16. In the **Summary of Changes** section of the **Review and Submit** page (Step 5 of 5), ensure the requested modifications are listed correctly

17. Select **Submit** once the requested modifications are ready for processing.

Position Number 00021632
Headcount Status Filled
Current Head Count 1 of 1

Step 5 of 5: Review and Submit

Effective Date 01/24/2022 Reason Code FTE Change from Temp to Reg
Effective Sequence 0 Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Reason Code	FTE	CNV
Action Date	2022-01-25	2020-07-28
Regular/Temporary	R	T
Full/Part Time	F	P
FTE	1	0

Related Information

View Position
Position History

Lecture 1: Submit Job Data Changes that Impact Benefits

The **Position Confirmation** screen appears pending the approval of the **HR Central Position Administrator**.

The screenshot displays the 'Position Confirmation' interface. At the top, a teal header contains the title 'Position Confirmation'. Below this, a light green banner features a blue checkmark icon and the text: 'The Position Number 00021632 has been successfully submitted for approval.' The main content area is divided into sections. The first section is titled 'Modify Position Approval' and contains a dropdown menu with the selected option 'Change from Temp to Reg' and the status 'Pending'. Below this, a red-bordered box highlights a 'Modify Position Approval' card. This card shows a clock icon and the status 'Pending', followed by a blue link 'Multiple Approvers' and the text 'HR Central Position Approver' with a right-pointing chevron. At the bottom of the screen, there are three buttons: 'Go to Position Details', 'Go to Manage/Create Position', and 'Go to Position Management'.

Lecture 1: Submit Job Data Changes that Impact Benefits

Once the position modification has been approved and validated, the next step is to validate the employee's job data record.

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Human Resources (HCM)' interface. On the left is a navigation menu with 'Job Information' expanded, showing 'Job Data', 'Workforce Job Summary', and 'Manage Employee Profile'. The main area is titled 'Job Data' and contains a search form. At the top of the form is a tab labeled 'Find an Existing Value' (highlighted with a red box) and a 'Keyword Search' tab. Below the tabs is a 'Search Criteria' section with several search fields: 'Empl ID' (with a 'begins with' dropdown and a text input field, highlighted with a red box), 'Empl Record' (with an '=' dropdown and a text input field), 'Name' (with a 'begins with' dropdown and a text input field), 'Last Name' (with a 'begins with' dropdown and a text input field), 'Second Last Name' (with a 'begins with' dropdown and a text input field), 'Alternate Character Name' (with a 'begins with' dropdown and a text input field), and 'Middle Name' (with a 'begins with' dropdown and a text input field). There is also a 'Case Sensitive' checkbox. At the bottom of the form are 'Search' (highlighted with a red box) and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lecture 1: Submit Job Data Changes that Impact Benefits

4. Select the **Job Information** tab to see the reporting change. In order to change the EMPL class, a new row must be added.
5. Select the **Work Location** tab.
6. Select the **plus (+) sign** to add a new row.
7. Enter the **effective date** and select the appropriate **Action** and **Reason** from the dropdown menu.
8. Select **Save**.

The screenshot displays the HR Administration interface for employee Kristy Hobbs (Empl ID: 00312190). The 'Work Location' tab is active, showing details for a position with number 00021632, titled 'RECREATION LEADER'. The 'Effective Date' is 01/24/2022, and the 'Effective Sequence' is 1. The 'Action' is 'Position Change' and the 'Reason' is 'Change from Temp to Reg'. A dropdown menu is open, showing options such as 'Job Re-Classification', 'Job Re-Classification - Promot', and 'Job Re-Classification - Select'. The 'Go To Row' button with a plus sign is also visible.

Lecture 1: Submit Job Data Changes that Impact Benefits

9. Navigate back to the **Job Information** tab.

10. Select the appropriate EMPL Class from the dropdown menu.

The screenshot shows a web interface for job information. At the top, there are tabs: Work Location, Job Information (highlighted with a red box), Job Labor, Payroll, Salary Plan, and Compensation. Below the tabs, the employee's name 'Kristy Hobbs' and 'Employee' are listed. To the right, 'Empl ID 00312190' and 'Empl Record 0' are displayed. The main section is titled 'Job Information Details' with a search icon and navigation controls. A 'Go To Row' button is visible. The details are organized into two columns. The left column includes: Effective Date (01/24/2022), Effective Sequence (3), HR Status (Active), Payroll Status (Leave With Pay), Job Code (007301), Entry Date (05/26/2020), Supervisor Level (13), Reports To (00010839), Regular/Temporary (Regular), Empl Class (Perm, highlighted with a red box), Regular Shift (Not Applicable), and Classified Ind (Classified). The right column includes: Action (Position Change), Reason (Change from Temp to Reg), Recreation Leader, Non-Supervisory, RECREATION THERAPIST 2 (00310945 Isadora Garica), Full/Part (Full-Time), and Protected Class (SSN Protected Only). At the bottom left, there is a 'Standard Hours' link with a question mark.

Lesson 4: Activities and Exercises



Lesson 4: Lesson Summary

Now that you have completed the lesson, you should be able to:

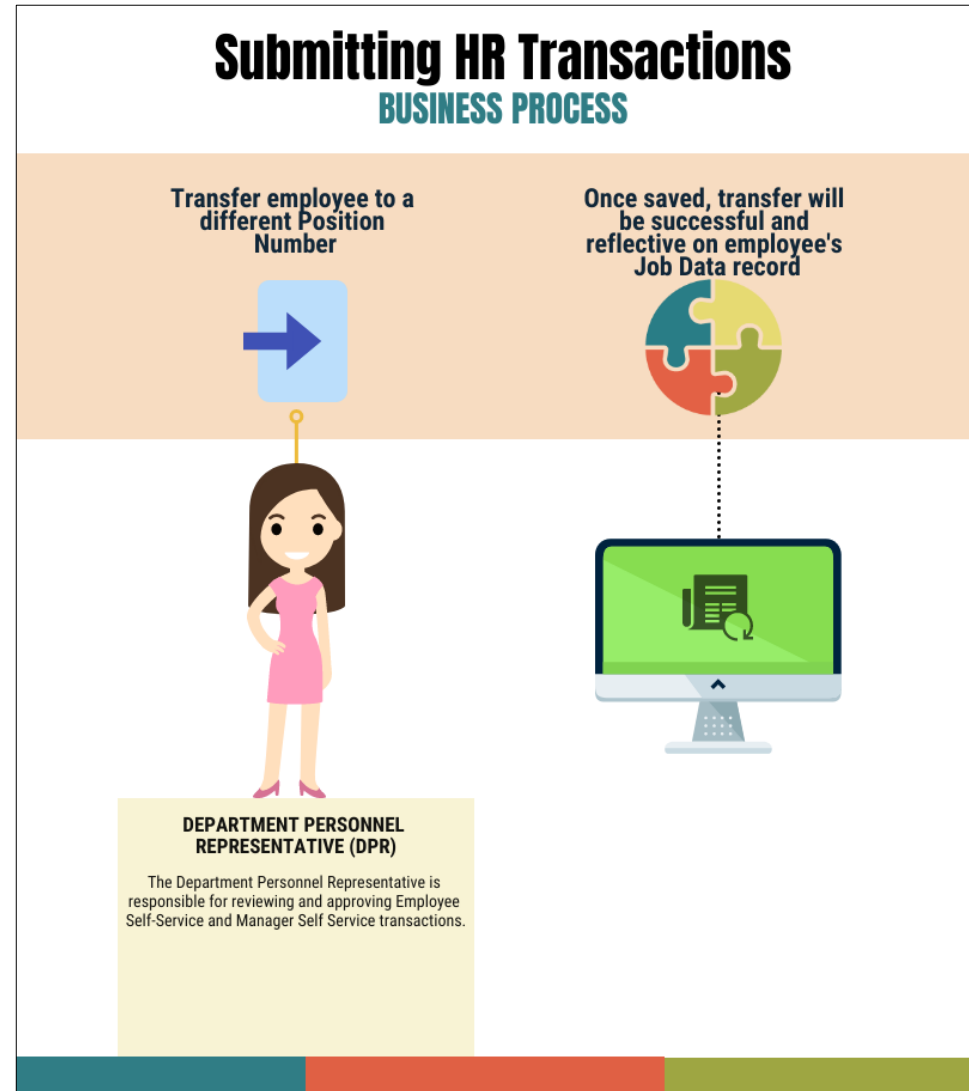
- Update a temporary employee to regular status in order for them to obtain benefits

Lesson 5: Submitting HR Transactions

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

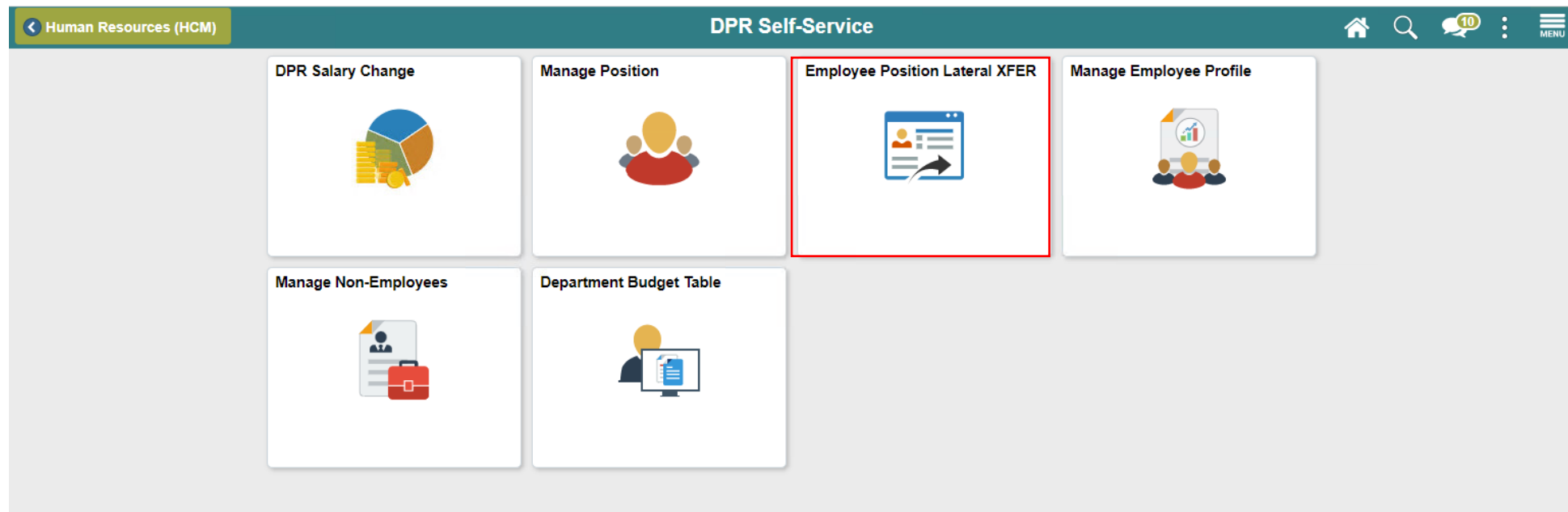
- Successfully transfer employees to another Position Number.
- Verify the transfer within the Job Data.

Lesson 5: Submitting HR Transactions



Lecture 1: Transfer Employee to a Position (Lateral)

Navigate to Employee Position Lateral XFER: **Human Resources (HCM) > DPR Self-Service > Employee Position Lateral XFER**



Lecture 1: Transfer Employee to a Position (Lateral)

On the **Position Lateral Transfer** page under **Find an Existing Value**:

1. In the **Empl ID** field, enter the **Employee's 8 digit Numeric Identification Number**.
2. In the **Business Unit** field, enter the **Business Unit**.
3. In the **First Name** field, enter the **employee's first name**.
4. In the **Last Name** field, enter the **employee's last name**.
5. Select **Search**.

PR Self-Service

Position Lateral Transfer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID begins with

Business Unit begins with

First Name begins with

Last Name begins with

Include History Correct History

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Lecture 1: Transfer Employee to a Position (Lateral)

6. In the **Effective Date** field, enter the **Effective Date of the Transfer**.
7. In the ***Position Number** field, enter the ***Position Number you wish to transfer the employee to**.
8. Select **Save**.

The screenshot displays the 'PR Self-Service' interface for 'Mdc Empl Posn'. It shows the following details:

- Empl ID: 00026999
- Name: Mayra Beltran
- Business Unit: HR Human Resources
- Department: HR01020000 RECRUITMENT
- Position Number: 00003260 HR PERSONNEL SERVICES SPEC
- Latest Effective Date: 12/28/2020

The 'Employee Position Data' section includes a table with the following entries:

Effective Date	Seq	Action
11/16/2021	0	XFR Transfer

The 'Effective Date' and 'Seq' fields are highlighted with a red box. Below the table, the '*Position Number' field is also highlighted with a red box and contains the value '00003262'. At the bottom of the form, there are several buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

Lecture 1: Transfer Employee to a Position (Lateral)

Notice the employee was transferred from **Position #00003260** to **Position #00003262**.

< PR Self-Service

Mdc Empl Posn

Empl ID 00026999
Name Mayra Beltran
Business Unit HR Human Resources
Department HR01020000 RECRUITMENT
Position Number 00003262 HR PERSONNEL SERVICES SPEC
Latest Effective Date 11/16/2021

Employee Position Data Find First 1-2 of 2 Last

Effective Date	11/16/2021	Seq	1
Action	XFR	Transfer	
*Position Number	<input type="text"/>		
Effective Date	11/16/2021	Seq	0
Action	XFR	Transfer	
Position Number	00003262		HR PERSONNEL SERVICES SPEC

Lecture 2: Verify Employee Transfer (Lateral)

Navigate to Job Data: **HCM >HR Administration > Job Information > Job Data.**

1. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number.**
2. Select **Search.**

The screenshot shows the 'Human Resources (HCM)' interface. On the left is a navigation menu with categories: Job Information (expanded), Headcount, Labor Administration, and HR Configuration. Under 'Job Information', 'Job Data' is selected. The main area is titled 'Job Data' and contains a search form. The form includes a 'Find an Existing Value' button and a 'Keyword Search' button. Below these are search criteria fields: 'Empl ID' (with a dropdown set to 'begins with' and a text input field), 'Empl Record' (with a dropdown set to '=' and a text input field), 'Name' (with a dropdown set to 'begins with' and a text input field), 'Last Name' (with a dropdown set to 'begins with' and a text input field), 'Second Last Name' (with a dropdown set to 'begins with' and a text input field), 'Alternate Character Name' (with a dropdown set to 'begins with' and a text input field), and 'Middle Name' (with a dropdown set to 'begins with' and a text input field). There is also a 'Case Sensitive' checkbox. At the bottom are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lecture 2: Verify Employee Transfer (Lateral)

Transfer successful. The employee's recent record is displayed (**Record 1 of 4**) with the recent Transfer effective of **11/16/2021**.

The screenshot displays the HR Administration interface for employee Mayra Beltran (Empl ID: 00026999). The 'Work Location' tab is active, showing a table of work location records. The first record is highlighted with a red box, indicating it is the current record (Record 1 of 4). The record details are as follows:

Field	Value
Effective Date	11/16/2021
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Position Number	00003262
Position Entry Date	11/16/2021
Regulatory Region	USA
Company	MDC
Business Unit	HR
Department	HR01020000
Department Entry Date	10/28/1996
Location	ID00000140
Establishment ID	MDC
Last Start Date	10/28/1996
Expected Job End Date	

Additional details for the highlighted record:

- Action: Transfer
- Reason: (blank)
- Current:
- Date Created: 11/16/2021

The interface includes navigation tabs (Work Location, Job Information, Job Labor, Payroll, Salary Plan, Compensation) and a bottom navigation bar with buttons for Save, Return to Search, Notify, and Refresh.

Lesson 5: Activities and Exercises



Lesson 5: Lesson Summary

Now that you have completed the lesson, you should be able to:

- Successfully transfer employees to another Position Number
- Verify the transfer within the Job Data

Lesson 6: Submitting HR Salary Changes

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

- Request Merit Increase for Salary Grade Employee
- Request Merit Increase for Salary Step Employee
- Request Component of Pay
- Request License/Certification

Lesson 6: Key Terms

Term	Definition
Components of Pay	Area that contains Base pay and additional Components of Pay

SALARY CHANGE APPROVAL

BUSINESS PROCESS

Submit Salary Change Request/Merit Increase



DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.

Review/Approve/Reject the Request



HR CENTRAL ADMINISTRATOR TECHNICIAN

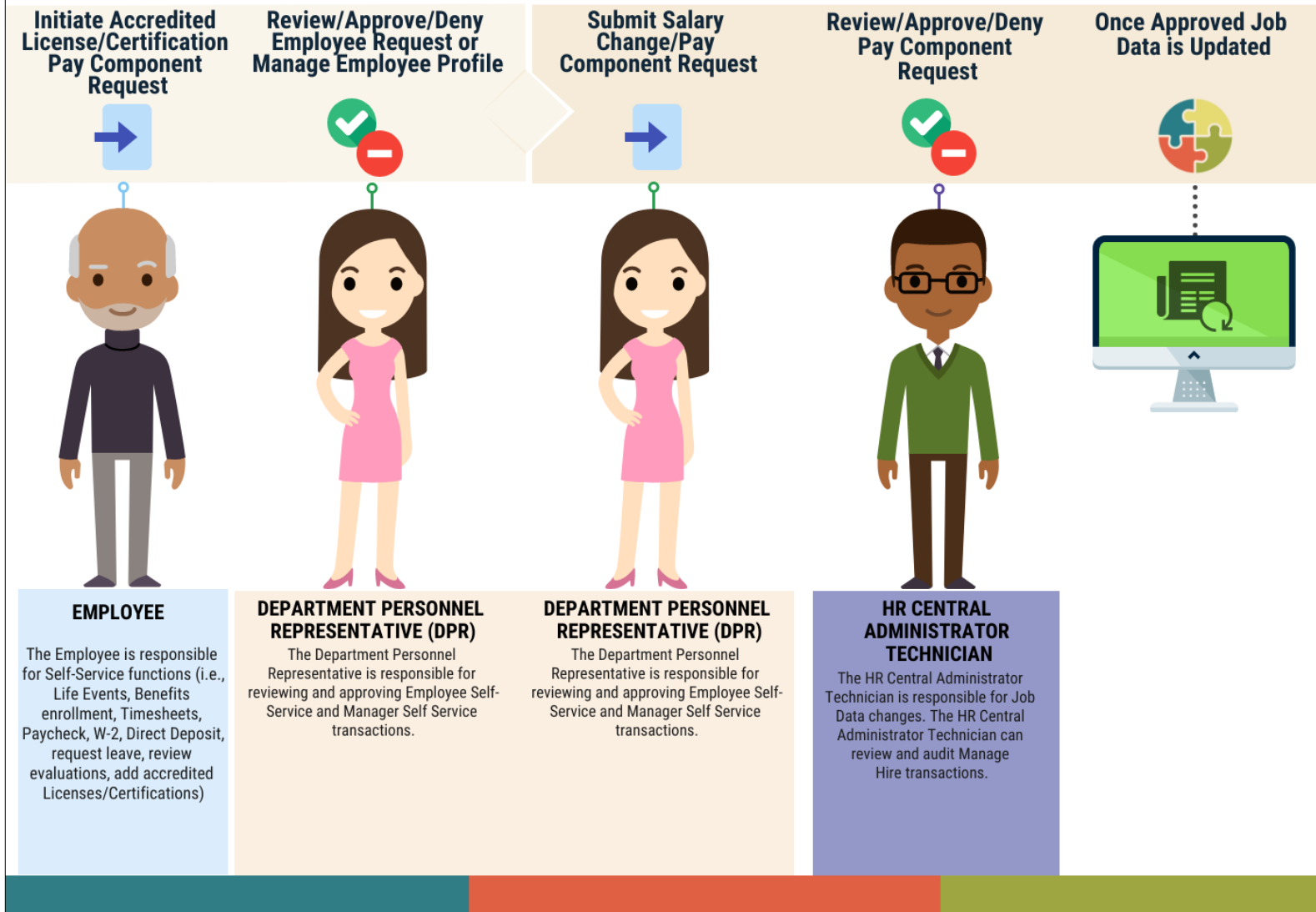
The HR Central Administrator Technician is responsible for Job Data changes. The HR Central Administrator Technician can review and audit Manage Hire transactions.

Once Approved, Employee's Job Data is updated



SALARY CHANGE (LICENSE/CERTIFICATION)

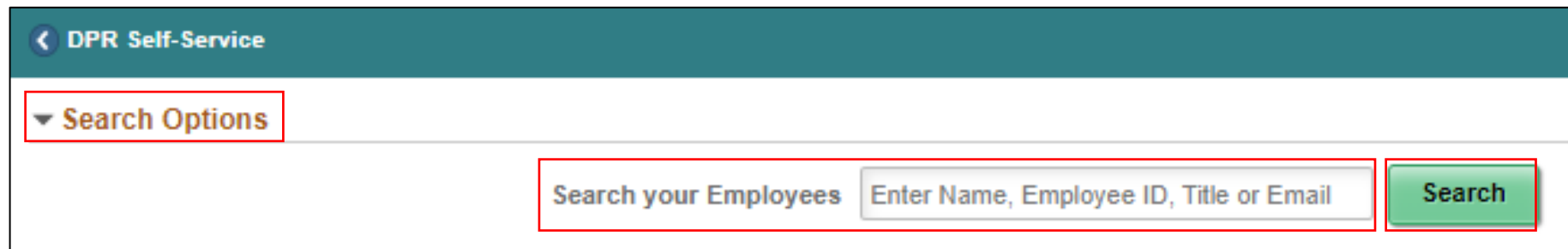
BUSINESS PROCESS



Lecture 1: Merit Increase (Salary Grade)

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter either the **Employee's Name or Employee ID #**.
3. Select **Search**.



← DPR Self-Service

▼ Search Options

Search your Employees Enter Name, Employee ID, Title or Email Search

Lecture 1: Merit Increase (Salary Grade)

4. Select the Employee's Record.


DPR Self-Service **DPR Salary Change**

▼ **Search Options**

Search your Employees

[Felica Krebs](#)

Select Employee 1 row

Name / Title / ID - Record	Status / Type	Department	
 Millie Gaskill Administrative Secretary 00218029 - 0	Active Employee	CSBG CENTERS - CH03010200	>

Lecture 1: Merit Increase (Salary Grade)

5. Under the **Compensation Details** section, in the ***Transaction Date** field enter the **effective date of the merit request**.
6. In the ***Reason** field select **Merit**.
7. In the **Change Percent** field enter the **merit increase in decimal form**.
8. **Tab** to see the **New Information Biweekly Salary** update accordingly.

Compensation Details

*Transaction Date: 03/10/2022
*Reason: Merit

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly	5.000	80.51	1,690.78	1,610.27	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

45,780.36 Compa-Ratio:1.16

33,119.58 Minimum | 39,346.32 Midpoint | 61,444.24 Maximum

New Information		Current Information	
Biweekly Salary	1,760.78 USD	Biweekly Salary	1,680.27 USD
Annual Rate	45,780.36 USD	Annual Rate	43,687.01 USD

● Changes Made
* Required Field

Lecture 1: Merit Increase (Salary Grade)

9. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate.
10. Select **Calculate Compensation**.
11. Select **Next**.

DPR Salary Change

Millie Gaskill
Administrative Secretary

MD Compensation Detail

MD Review & Submit

Next >

Compensation Details

*Transaction Date: 03/10/2022
*Reason: Merit

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly	5.000	80.51	1,690.78	1,610.27	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

46,780.36 Compa-Ratio: 1.16

53,119.58 Minimum | 59,546.32 Midpoint | 61,444.24 Maximum

New Information

Biweekly Salary: 1,760.78 USD
Annual Rate: 45,780.36 USD

Current Information

Biweekly Salary: 1,690.27 USD
Annual Rate: 43,687.01 USD

Salary Plan

Salary Admin Plan: K | GSAF - OPEIU Local 100
Salary Grade: A01 | A01
Grade Entry Date: 02/28/2007
Step: []
Step Entry Date: []

Default Pay Components

Pay Components (2 rows)

Amounts | Controls | Changes | Conversion | Show All

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 MDBKLY	0	1,690.78	USD	B		
2 PRMPAY	0	70.00	USD	B		

Calculate Compensation

Lecture 1: Merit Increase (Salary Grade)

12. In the **Comments** section enter the action requested or details. (Optional)

Select **Add Attachment** to add any supporting documents.

13. Select **Submit** once ready for processing.

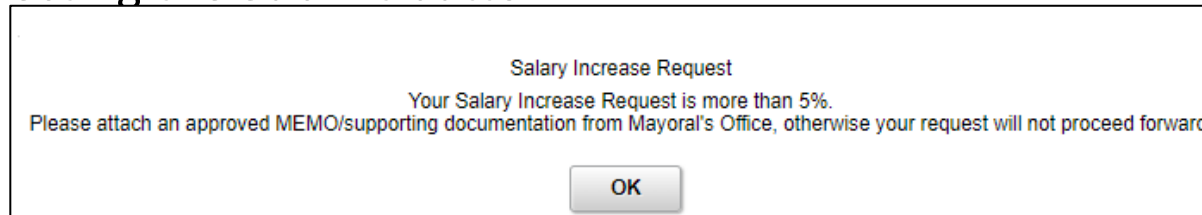
The screenshot shows a web form titled "DPR Salary Change" for user "Millie Gaskill, Administrative Secretary". The form is in the "MD Review & Submit" step. It includes a "Review and Submit" section with fields for "Transaction Date" (03/10/2022) and "Reason" (Merit). Below this is a comparison table of "New Information" and "Current Information" for biweekly and annual rates. A "Comments" section contains the text "Requesting 5% Merit Increase effective 3/10/2022". At the bottom, there is an "Attachments" section with an "Add Attachment" button. A legend indicates that yellow dots denote "Changes Made" and red asterisks denote "Required Fields".

New Information		Current Information	
Biweekly Salary	1,760.78 USD	1,680.27 USD	
Annual Rate	45,780.36 USD	43,687.01 USD	

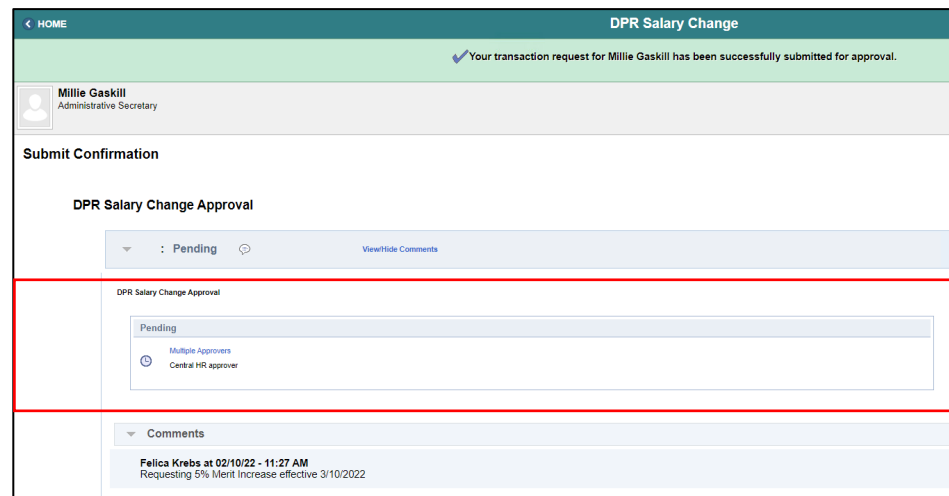
Comments: Requesting 5% Merit Increase effective 3/10/2022

Lecture 1: Merit Increase (Salary Grade)

NOTE: If the merit increase is more than 5% you will receive the following message. When requesting more than 5% merit increase, authorized documentation must be attached to the salary request before selecting the Submit button.



The DPR Salary Change confirmation is displayed pending the approval of Central HR.



Lecture 1: Verify Merit Increase (Salary Grade)

Navigate to Job Data: **Human Resources (HCM) > HR Administration > Job Information > Job Data**

1. Select the **Find an Existing Value** tab.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Job Data' search interface in the HR Administration system. The left sidebar contains navigation options: Job Information (expanded), Workforce Job Summary, Manage Employee Profile, Headcount, Labor Administration, and HR Configuration. The main content area is titled 'Job Data' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two search tabs: 'Find an Existing Value' (highlighted with a red box) and 'Keyword Search'. Under the 'Search Criteria' section, several search fields are listed: 'Empl ID' (with a dropdown set to 'begins with' and a text input field, highlighted with a red box), 'Empl Record' (with a dropdown set to '=' and a text input field), 'Name' (with a dropdown set to 'begins with' and a text input field), 'Last Name' (with a dropdown set to 'begins with' and a text input field), 'Second Last Name' (with a dropdown set to 'begins with' and a text input field), 'Alternate Character Name' (with a dropdown set to 'begins with' and a text input field), and 'Middle Name' (with a dropdown set to 'begins with' and a text input field). At the bottom, there are checkboxes for 'Include History' and 'Case Sensitive', and a 'Search' button (highlighted with a red box) next to a 'Clear' button. Additional options for 'Basic Search' and 'Save Search Criteria' are also visible.

Lecture 1: Verify Merit Increase (Salary Grade)

4. Select the **Salary Plan** tab.

Page **2 of 2** is the previous Pay Rate Change.

Human Resources (HCM) HR Administration

Job Information: Work Location, Job Information, Job Labor, Payroll, **Salary Plan**, Compensation

Job Data: Millie Gaskill Employee, Empl ID 00218029, Empl Record 0

Salary Plan Details (1 of 2)

Effective Date	03/10/2022	Action	Pay Rate Change
Effective Sequence	0	Reason	Merit
HR Status	Active		
Payroll Status	Active		

Salary Admin Plan: K, Grade: A01, Step: A01, GSAF - OPEIU Local 100

Grade Entry Date: 02/26/2007, Step Entry Date:

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History

Human Resources (HCM) HR Administration

Job Information: Work Location, Job Information, Job Labor, Payroll, **Salary Plan**, Compensation

Job Data: Millie Gaskill Employee, Empl ID 00218029, Empl Record 0

Salary Plan Details (2 of 2)

Effective Date	01/31/2022	Action	Pay Rate Change
Effective Sequence	0	Reason	Merit
HR Status	Active		
Payroll Status	Active		

Salary Admin Plan: K, Grade: A01, Step: A01, GSAF - OPEIU Local 100

Grade Entry Date: 02/26/2007, Step Entry Date:

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History

Lecture 1: Verify Merit Increase (Salary Grade)

5. Select the **Compensation** tab to see the Compensation Details between Record 1 and Record 2.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Millie Gaskill Employee Empl ID 00218029
Empl Record 0

Compensation Details ① 1 of 2

Effective Date 03/10/2022 Go To Row

Effective Sequence 0 Action Pay Rate Change
HR Status Active Reason Merit
Payroll Status Active

Future

Compensation Rate 1,760.78 USD Frequency B Biweekly

▶ Comparative Information ①

▶ Pay Rates ①

Default Pay Components Contract Change Prorate Option

Pay Components ①

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,690.782975	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Creditable Adjusted Dates

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Millie Gaskill Employee Empl ID 00218029
Empl Record 0

Compensation Details ① 2 of 2

Effective Date 01/31/2022 Go To Row

Effective Sequence 0 Action Pay Rate Change
HR Status Active Reason Merit
Payroll Status Active

Current

Compensation Rate 1,690.27 USD Frequency B Biweekly

▶ Comparative Information ①

▶ Pay Rates ①

Default Pay Components Contract Change Prorate Option

Pay Components ①

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Creditable Adjusted Dates

Lecture 1: Verify Merit Increase (Salary Grade)

Record 2 of 2

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Millie Gaskill Employee | Empl ID 00218029 | Empl Record 0

Compensation Details 2 of 2

Effective Date 01/31/2022 | Action Pay Rate Change | Reason Merit | Go To Row

Effective Sequence 0 | HR Status Active | Payroll Status Active

Compensation Rate 1,680.27 USD | Frequency B Biweekly | Current

Comparative Information

Pay Rates

Default Pay Components | Contract Change Prorate Option

Pay Components 1-2 of 2

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	B			
2 PRMPAY	0	70.000000	USD	B			

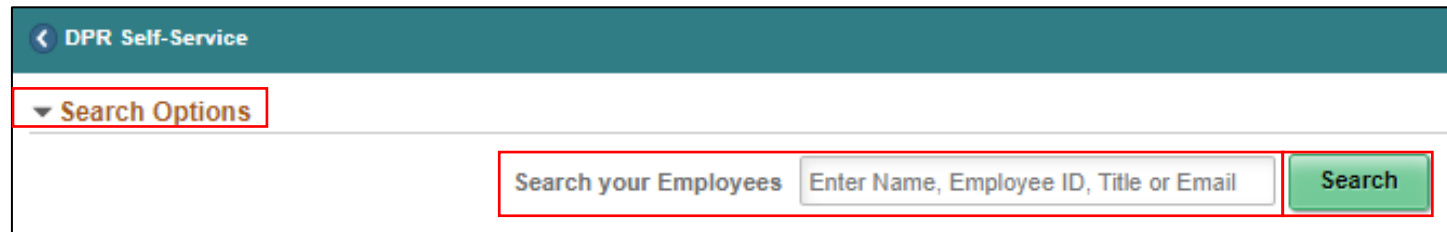
Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Creditable Adjusted Dates

Lecture 2: Merit Increase (Salary Step)

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter **Employee Name or Employee ID #**.
3. Select **Search**.




The screenshot shows the 'DPR Self-Service' header with a back arrow. Below it is a 'Search Options' dropdown menu. Underneath is a search bar with the placeholder text 'Search your Employees' and 'Enter Name, Employee ID, Title or Email', followed by a green 'Search' button.

4. Select the **Employee's Record**.



The screenshot shows the 'DPR Self-Service' header with the title 'DPR Salary Change'. Below it is the 'Search Options' dropdown. The search bar contains '00014872' and a green 'Search' button. Below the search bar, the name 'Felica Krebs' is displayed. Underneath is a 'Select Employee' section with a table showing one result. The table has columns for 'Name / Title / ID - Record', 'Status / Type', and 'Department'. The row for 'Ofir Doty' is highlighted with a red border.

Name / Title / ID - Record	Status / Type	Department
 Ofir Doty Police Records Tech 3 00014872 - 0	Active Employee	CENTRAL RECORDS - PERSONNEL - PD03120100

Lecture 2: Merit Increase (Salary Step)

5. Under **Compensation Details**, in the ***Transaction Date** field enter the **effective date of the Merit**.
6. In the ***Reason** field select **Merit**.
7. Under the **Salary Plan** section, select the next **Step**.

The screenshot displays the 'DPR Salary Change' form for 'Ofir Doty, Police Records Tech 3'. The form is in step 1, 'MD Compensation Detail'. The 'Compensation Details' section includes a red box around the '*Transaction Date' field (01/31/2022) and the '*Reason' dropdown menu (Merit). Below this is a table of pay components:

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,057.74	2,057.74	USD	Flat Amount	Biweekly
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly

A salary range bar shows the current salary of 2,127.74 USD. The bar has a minimum of 38,148.76, a midpoint of 45,169.74, and a maximum of 63,785.72. The 'New Information' section shows the current biweekly salary of 2,127.74 USD and an annual rate of 55,321.24 USD. The 'Salary Plan' section shows 'Salary Admin Plan K' and 'Salary Grade 035'. A red box highlights the 'Step' field set to '10'.

Lecture 2: Merit Increase (Salary Step)

8. Scroll down and select **Default Pay Components** to refresh the MDC Biweekly rate.
9. Select **Calculate Compensation**
10. Select **Next**.

The screenshot displays the 'DPR Salary Change' application interface. At the top, there are two progress indicators: '1 MD Compensation Detail' and '2 MD Review & Submit'. A 'Next >' button is highlighted in the top right corner. Below the progress indicators, the '*Reason' is set to 'Merit'. A table lists pay components:

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly		88.06	2,145.80	2,057.74	USD	Flat Amount	Biweekly
Premium Pay		70.00	70.00	70.00	USD	Flat Amount	Biweekly

Below the table is a salary range bar with values: 38,148.76 Minimum, 45,189.74 Midpoint, and 63,705.72 Maximum. A '55,321.24 Compa-Ratio: 1.23' is also shown. Underneath, 'New Information' and 'Current Information' are compared:

	New Information	Current Information
Biweekly Salary	2,215.80 USD	2,127.74 USD
Annual Rate	57,610.80 USD	55,321.24 USD

The 'Salary Plan' section shows: Salary Admin Plan K, Salary Grade 035, Grade Entry Date 01/31/1994, Step 10 (highlighted), and Step Entry Date 01/31/2022. The 'Default Pay Components' section is highlighted, showing a table with 2 rows:

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 MDBKLY	0	2,145.80	USD	B		
2 PRMPAY	0	70.00	USD	B		

At the bottom, the 'Calculate Compensation' button is highlighted.

Lecture 2: Merit Increase (Salary Step)

11. In the **Comments** section enter a brief description of the request. (Optional) Select **Add Attachment** to add any documents.
12. Select **Submit** once ready for processing.

DPR Salary Change

Ofir Doty
Police Records Tech 3

MD Compensation Detail (1) MD Review & Submit (2)

< Previous Submit

Review and Submit

Transaction Date	01/31/2022
Reason	Merit
New Information	
Biweekly Salary	2,215.80 USD
Annual Rate	57,610.80 USD
Current Information	
	2,127.74 USD
	55,321.24 USD

Comments

Requesting Merit Increase from Step 9 to Step 10 effective 01/31/22

Attachments

No documents have been attached.

Add Attachment

Changes Made
Required Field

Lecture 2: Merit Increase (Salary Step)

The screenshot displays a mobile application interface for a 'DPR Salary Change' transaction. At the top, a teal header bar contains a back arrow and the text 'HOME' on the left, and 'DPR Salary Change' on the right. Below the header, a green banner with a checkmark icon contains the message: 'Your transaction request for Ofir Doty has been successfully submitted for approval.' Underneath, a grey bar shows a profile icon and the name 'Ofir Doty' with the title 'Police Records Tech 3'. The main content area is titled 'Submit Confirmation' and features a section for 'DPR Salary Change Approval'. This section includes a status bar with a dropdown arrow, the text ': Pending', a comment icon, and a 'View/Hide Comments' link. Below this is a detailed approval card titled 'DPR Salary Change Approval' which shows a 'Pending' status, a 'Multiple Approvers' label, and a clock icon next to the text 'Central HR approver'. At the bottom of the approval card is a 'Comments' section with a dropdown arrow. A comment from 'Felica Krebs at 01/31/22 - 2:59 PM' is visible, stating 'Requesting Merit Increase from Step 9 to Step 10 effective 01/31/22'. A red rectangular box highlights the approval card area.

Lecture 3: Pay Components (Pay Supplements)

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for an Employee.
2. In the **Search your Employees** field, enter **Employee ID, Employee Name, or Classification**.
3. Select **Search**.

← DPR Self-Service

▼ Search Options

Search your Employees

4. Select the **Employee's Record**.


← DPR Self-Service DPR Salary Change

▼ Search Options

Search your Employees

Felica Krebs

Select Employee 1 row

Name / Title / ID - Record	Status / Type	Department
 Georgie Looper Fire Lieutenant 00197376 - 0	Active Employee	SOUTH AREA COMMAND - FR03010200

Lecture 3: Pay Components (Pay Supplements)

5. Under **Compensation Details**, in the ***Transaction Date** field enter the **effective Date of the pay component**.
6. In ***Reason** field select **Components of Pay**.

Compensation Details

*Transaction Date: 01/31/2022
*Reason: Components of Pay

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
Education Incentive Pay			155.78	155.78	USD	Flat Amount	Biweekly
Fire - B. A.			50.77	50.77	USD	Flat Amount	Biweekly
Fire Paramedic (Protocol Certi			24.000	24.000	%	Percent	Biweekly
Fire Hazardous			125.00	125.00	USD	Flat Amount	Biweekly
MDC Biweekly			3,256.87	3,256.87	USD	Flat Amount	Biweekly

114,593.86 Compa-Ratio:1.68

57,019.04 Minimum 66,182.14 Midpoint 86,728.90 Maximum

	New Information	Current Information
Biweekly Salary	4,407.46 USD	4,407.46 USD
Annual Rate	114,593.86 USD	114,593.86 USD

● Changes Made
* Required Field

Lecture 3: Pay Components (Pay Supplements)

7. Scroll down to the **Pay Components** Section.
8. Select the **Plus (+) sign** on the right side to add a new row.
9. On the ***Rate Code** column of the newly added row, select the **magnifying glass** for a list of available Pay Components.

Pay Components 6 rows

	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group		
1	EDINCP <input type="text"/>	0	155.78 <input type="text"/>	USD	B			<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text"/>	1		<input type="text"/>				<input type="button" value="+"/>	<input type="button" value="-"/>
3	FIRBA <input type="text"/>	0	50.77 <input type="text"/>	USD	B			<input type="button" value="+"/>	<input type="button" value="-"/>
4	FIRPRM <input type="text"/>	0	819.04 <input type="text"/>	USD	B	24.000	MDCMAX	<input type="button" value="+"/>	<input type="button" value="-"/>
5	HZDFIR <input type="text"/>	0	125.00 <input type="text"/>	USD	B			<input type="button" value="+"/>	<input type="button" value="-"/>
6	MDBKLY <input type="text"/>	0	3,256.87 <input type="text"/>	USD	B			<input type="button" value="+"/>	<input type="button" value="-"/>

Lecture 3: Pay Components (Pay Supplements)

10. Select **LEAD** for Leadworker.
11. Select **Default Pay Components**.
12. Select **Calculate Compensation**.
13. Select **Next**.

DPR Salary Change

George Looper
Fire Lieutenant

MD Compensation Detail (1) MD Review & Submit (2)

New Information

Biweekly Salary	4,600.61 USD
Annual Rate	119,615.88 USD

Current Information

Biweekly Salary	4,407.46 USD
Annual Rate	114,593.86 USD

Changes Made
Required Field

Salary Plan

Salary Admin Plan C IAFF Local 1403 - Firefighters

Salary Grade 004 004

Grade Entry Date 10/20/2003

Step 9

Step Entry Date 10/20/2003

Default Pay Components

Pay Components 6 rows

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 EDINCP	0	155.78 USD	USD	B		
2 FIRBA	0	50.77 USD	USD	B		
3 FIRPRM	0	856.42 USD	USD	B	24.000	MDCMAX
4 HZDFIR	0	125.00 USD	USD	B		
5 LEAD	0	155.77 USD	USD	B		
6 MDBKLY	0	3,256.87 USD	USD	B		

Calculate Compensation

Next >

Lecture 3: Pay Components (Pay Supplements)

14. In the **Comments** section, enter a brief description of the request.

NOTE: Approved HR Compensation Memoranda are required when adding some Components of Pay.

15. Select **Add Attachment** to add the authorized Compensation Memo granting the employee the components of pay.

DPR Salary Change

Georgie Looper
Fire Lieutenant

1 MD Compensation Detail 2 MD Review & Submit

< Previous Submit

Review and Submit

Transaction Date 01/31/2022
Reason Components of Pay

	New Information	Current Information
Biweekly Salary	4,600.61 USD	4,407.46 USD
Annual Rate	119,615.88 USD	114,593.86 USD

Comments

Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD)

Attachments

No documents have been attached.

Add Attachment

• Changes Made
* Required Field

Lecture 3: Pay Components (Pay Supplements)

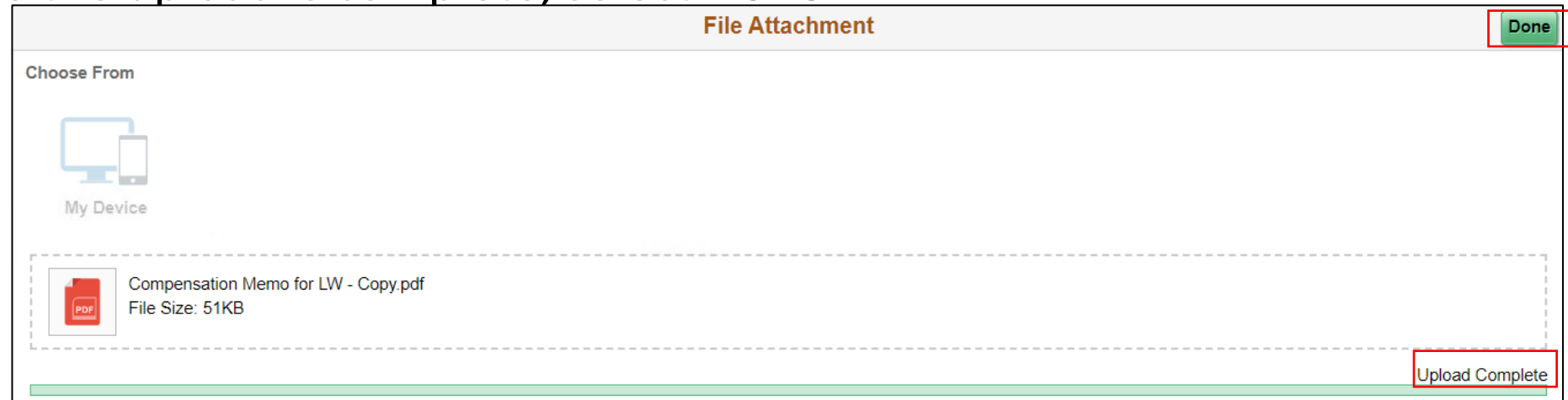
16. Select **My Device**.

17. Locate and select **the documentation**.

18. Select **Open**.

19. Select **Upload**.

20. Once the upload is complete, select **Done**.



Lecture 3: Pay Components (Pay Supplements)

21. Review the adjustments accordingly. Notice the **Transaction Date, Reason, the New Biweekly Salary Information versus the Current Information Biweekly Salary Information, Comments, and Attachments.**

22. Select **Submit** once ready to submit the request.

The DPR Salary Change Request has been successfully submitted and pending approval by Central HR.

The screenshot shows the 'DPR Salary Change' form for Georgie Looper, Fire Lieutenant. The form is in the 'Review and Submit' stage, with a progress indicator showing step 1 (MD Compensation Detail) and step 2 (MD Review & Submit). The 'Review and Submit' section includes a table for 'Components of Pay' comparing 'New Information' and 'Current Information'. The 'Comments' section contains a note: 'Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD)'. The 'Attachments' section shows a file named 'Compensation_Memo_for_LW_-_Copy.pdf' with a description 'Compensation_Memo_for_' and a date time of '02/10/22 2:38:38PM'. The form has 'Previous' and 'Submit' buttons.

Reason	Components of Pay							
Biweekly Salary	<table border="1"><thead><tr><th>New Information</th><th>Current Information</th></tr></thead><tbody><tr><td>4,600.81 USD</td><td>4,407.46 USD</td></tr><tr><td>Annual Rate</td><td>119,615.88 USD</td><td>114,593.86 USD</td></tr></tbody></table>	New Information	Current Information	4,600.81 USD	4,407.46 USD	Annual Rate	119,615.88 USD	114,593.86 USD
New Information	Current Information							
4,600.81 USD	4,407.46 USD							
Annual Rate	119,615.88 USD	114,593.86 USD						

The screenshot shows the 'Submit Confirmation' screen for the 'DPR Salary Change' form. A green banner at the top states: 'Your transaction request for Georgie Looper has been successfully submitted for approval.' The user's name and title, 'Georgie Looper, Fire Lieutenant', are displayed. The 'Submit Confirmation' section shows the 'DPR Salary Change Approval' status as 'Pending'. A comment box is visible with the text: 'Felica Krebs at 02/10/22 - 2:40 PM Per approved HR Compensation Memo effective 01/31/2022 adding Leadworker pay (LEAD)'. The form has a 'HOME' button in the top left corner.

Lecture 4: Pay Components (License/Certifications)

Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile**

1. Select **Find an Existing Value** tab.
2. In the **Empl ID** field enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot displays the 'Human Resources (HCM)' interface, specifically the 'HR Administration' section. The left sidebar shows a navigation menu with 'Manage Employee Profile' highlighted. The main content area is titled 'Person Profiles' and includes a search section. The 'Find an Existing Value' tab is selected, and the 'Empl ID' field is highlighted with a red box. The search criteria section includes dropdown menus for 'Empl ID', 'Profile Type', 'Name', and 'Last Name', each with a 'begins with' dropdown and a text input field. The 'Include History' checkbox is checked, and the 'Case Sensitive' checkbox is unchecked. The 'Search' button is highlighted in green.

Lecture 4: Pay Components (License/Certifications)

4. Select the **Qualifications** tab.
5. Under **Licenses and Certification** select the **Add New Licenses and Certifications** hyperlink.

The screenshot displays the 'Person Profile' page in the HR Administration system. The left sidebar shows navigation options: Job Information, Workforce Job Summary, Manage Employee Profile (selected), Headcount, Labor Administration, and HR Configuration. The main content area shows the profile for Kaylani O'leary (Empl ID: 00219546). The 'Qualifications' tab is highlighted with a red box. Below the tabs, there are sections for Honors and Awards, Language Skills, Licenses and Certifications, Memberships, and Competencies. The 'Licenses and Certifications' section contains a red box around the '+ Add New Licenses and Certifications' hyperlink. At the bottom, there are 'Save', 'Return to Search', and 'Add' buttons.

Lecture 4: Pay Components (License/Certifications)

6. In the ***Issue Date** field, enter the **issue date of the license/certification**.
7. In the ***License** field, select the **magnifying glass to search for the qualified license/certification**.
8. In the **Country** field, enter **USA**.
9. In the **State** field, enter **FL**.
10. Select the **License Verified** check box once **verified**.

NOTE: It is important that this check box is selected once the license has been verified.

11. In the **Expiration Date** field, enter the **expiration date of the license/certification**.
12. In the **License/Certification Number** field enter the **License/Certificaiton number**.
13. In the **Issued By** field, enter the **qualified agency that issued the employee's license/certification**.
14. Select **OK**.

Person Profile

Help

Add New Licenses and Certifications

Empl ID 00219546 Kaylani Oleary
Profile Type PERSON Person

Add item details. Select OK to apply changes and return. Select Cancel to return without making any changes. Select Apply and Add Another to continue adding additional items.

Details 1 of 1 View All


*Issue Date 01/01/2022
*License CPPO Cert Public Purchasing Officer
Country USA United States
State FL Florida
 License Verified
Expiration Date 01/01/2025
License/Certification Number CPP12345 246 characters remaining
Issued By Universal Public Procurement Certification Council (UPPCC) 196 characters remaining

OK Cancel Apply and Add Another

Lecture 4: Pay Components (License/Certifications)

15. Under **Attachment**, select the **paper clip** to add the **license/certification** documentation.

The screenshot displays the 'Person Profile' page for Kaylani O'Leary in the HR Administration system. The profile details include Empl ID 00219546, Profile Type PERSON, and Profile Status Active. The 'Qualifications' tab is selected, showing a table of Licenses and Certifications. The table has the following data:

ID	License	Attachments
CPPO	Cert Public Purchasing Officer	

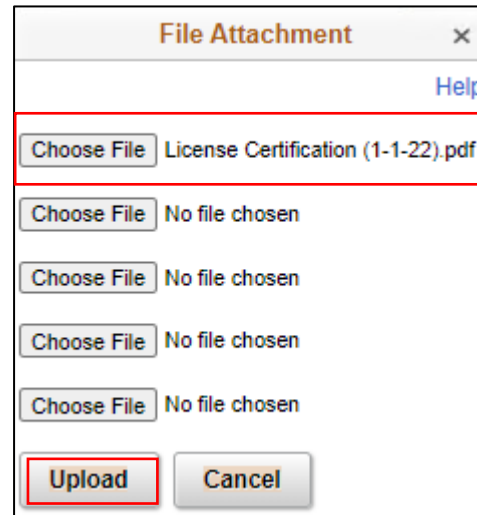
Below the table, there are buttons for 'Add New Licenses and Certifications', 'Save', and 'Return to Search'. The 'Attachments' column header is highlighted with a red box, and the paper clip icon in the row below it is also highlighted with a red box.

Lecture 4: Pay Components (License/Certifications)

16. Select **Add Attachment** to enclose the license/certification documentation.

17. Select **Choose File** and select the **file from the computer**.

18. Select **Upload**.




Lecture 4: Pay Components (License/Certifications)

19. In the **Description** field, enter a **brief description**.
20. Select **OK**.

Profile Item Attachments Help

Attachments

File Name Description Attached On

License_Certification_(1-1-22).pdf	CPPO K. O'leary 01-01-22	02/01/2022 9:45:06AM	
------------------------------------	--------------------------	-------------------------	---

Add Attachment

OK Cancel

Lecture 4: Pay Components (License/Certifications)

21. Once all supporting documentations are enclosed, select **Save**.

Human Resources (HCM) HR Administration

Job Information

Job Data

Workforce Job Summary

Manage Employee Profile

Headcount

Labor Administration

HR Configuration

Person Profile

Empl ID: 00219546 Kaylani O'Leary
Profile Type: PERSON Person
*Profile Status: Active
*Description: Kaylani O'Leary

Print Comments Profile Actions [Select Action]

Education **Qualifications** Veterans' Preference Additional Information MDC Blue Book

Honors and Awards
There are currently no Honors and Awards for this profile. Please add one if required.
+ Add New Honors and Awards

Language Skills
There are currently no Language Skills for this profile. Please add one if required.
+ Add New Language Skills

Licenses and Certifications

ID	License	Attachments
CPPO	Cert Public Purchasing Officer	

+ Add New Licenses and Certifications

Memberships
There are currently no Memberships for this profile. Please add one if required.
+ Add New Memberships

Competencies
There are currently no Competencies for this profile. Please add one if required.
+ Add New Competencies

Save

Return to Search Add

Lecture 4: Pay Components (License/Certifications)

Navigate to DPR Salary Change: **Human Resources (HCM) > DPR Self-Service > DPR Salary Change**

1. Select **Search Options** to search for the Employee.
2. In the **Search your Employees**, field enter **Employee ID, Employee Name, or Classification**.
3. Select **Search**.

DPR Self-Service

Search Options

Search your Employees Enter Name, Employee ID, Title or Email Search

4. Select the **Employee's Record**.


DPR Self-Service DPR Salary Change

Search Options

Search your Employees 00219546 Search

Felica Krebs

Select Employee 1 row

Name / Title / ID - Record	Status / Type	Department
 Kaylani Oleary Procurement Contracting Ofc 1 00219546 - 0	Active Employee	PROCUREMENT - ID08010000

Lecture 4: Pay Components (License/Certifications)

5. In the ***Transaction Date** field, enter the **effective date of the transaction which is the first day of the beginning of pay period after employee's certification issued date.**

NOTE: The effective date for Licenses/Certifications is the first of the beginning of the pay period after the employee's certification issued date.

6. In the ***Reason** field, select **Components of Pay** for License/Certifications.
7. In the **Pay Components** section, select the **Plus sign (+)** to add the ***Rate Code** for the License/Certification.
8. A new row will appear, select the **magnifying glass** to select the **License/Certification Rate Code.**

The screenshot displays the 'DPR Salary Change' interface for Kaylan O'Leary. The 'Transaction Date' field is highlighted with a red box and contains '01/10/2022'. The 'Reason' dropdown is set to 'Components of Pay'. Below this is a table of pay components:

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
MDC Biweekly			2,874.10	2,874.10	USD	Flat Amount	Biweekly
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly

A salary range bar is shown with a minimum of 64,912.00 and a maximum of 96,710.00. The current position is 71,348.80. Below this, 'New Information' and 'Current Information' are displayed:

Category	Value	Unit
Biweekly Salary	2,744.10	USD
Annual Rate	71,348.80	USD

The 'Salary Plan' section shows 'Salary Admin Plan' as 'OSAF - OPEIU Local 100' and 'Salary Grade' as '108'. The 'Pay Components' table at the bottom has three rows:

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
MDCBLY	0	2,874.10	USD	B		
PRMPPAY	0	70.00	USD	B		
	0					

Lecture 4: Pay Components (License/Certifications)

9. Select the **Comp Rate Code** related to the **License/Certification**.

Cancel Lookup

Search for: Rate Code

▶ Search Criteria

▼ Search Results

8 rows

Comp Rate Code	Description	Comp Base Pay Switch	Rate Code Type	Rate Code Class
CARALW	Car Commuting Allowance	Y	Flat Amount	FLAT
HFSTP	Half Step	Y	Flat Amount	HLFSTP
LEAD	Leadworker	Y	Flat Amount	1STEP
MDBKLY	MDC Biweekly	Y	Flat Amount	FLAT
NGT1S	Night Differential	Y	Flat Amount	1STEP
NGT2	Night Differential	Y	Flat Amount	2STEP
PRCHCT	Purchasing Or Contract Procure	Y	Flat Amount	1STEP
PRMPAY	Premium Pay	Y	Flat Amount	FLAT

Lecture 4: Pay Components (License/Certifications)

10. Select **Default Pay Components**.

11. Select **Calculate Compensation**.

The system has now properly calculated the employee's new Biweekly Salary.

12. Select **Next**.

The screenshot displays the 'DPR Salary Change' interface for employee Kaylani Olesky. The 'Compensation Details' section shows a transaction date of 01/10/2022 and a reason of 'Components of Pay'. A table lists the following pay components:

Pay Component	Change Percent	Change Amount	New Amount	Current Amount	Currency Code	Type	Frequency
LOC Biweekly			2,874.10	2,874.10	USD	Flat Amount	Biweekly
Purchasing O-Contract Proce			131.94	131.94	USD	Flat Amount	Biweekly
Premium Pay			70.00	70.00	USD	Flat Amount	Biweekly

Below the table, a salary range bar shows the new information: Biweekly Salary of 2,875.04 USD and Annual Rate of 74,777.04 USD. The current information shows Biweekly Salary of 2,744.10 USD and Annual Rate of 71,546.00 USD. The 'Salary Plan' section indicates the employee is on the 'GS4F-CPEU Local 100' plan, grade 108, step 5, with a grade entry date of 09/11/2007.

The 'Default Pay Components' section contains a table with the following data:

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 VDBAL	0	2,874.10	USD	B		
2 PRCHCT	0	131.94	USD	B		
3 PRSDRY	0	70.00	USD	B		

Red boxes in the original image highlight the 'Next' button, the 'Default Pay Components' section, and the three rows in the table above.

Lecture 4: Pay Components (License/Certifications)

13. Review the **New Information** section versus the **Current Information** section. Notice the new **Biweekly Salary**.
14. In the **Comments** section, add a **brief description for the request**.
15. Select the **Add Attachment** to **add any supporting documentation**.
16. Review and ensure the request is complete then select **Submit**.

The screenshot displays the 'DPR Salary Change' form for Kaylani O'leary. The form is in a 'Review and Submit' state, indicated by a progress bar at the top with step 1 (MD Compensation Detail) completed and step 2 (MD Review & Submit) active. The 'Review and Submit' section shows a comparison of 'New Information' and 'Current Information' for 'Biweekly Salary' and 'Annual Rate'. The 'Comments' section contains the text 'Request to add the verified CPPO Certification effective 01/10/2022'. The 'Attachments' section shows 'No documents have been attached' and an 'Add Attachment' button. A legend at the bottom left indicates that a yellow dot represents 'Changes Made' and a red dot represents 'Required Field'.

Reason	Components of Pay	New Information	Current Information
Biweekly Salary	2,876.04 USD	2,744.10 USD	
Annual Rate	74,777.04 USD	71,346.80 USD	

Lecture 4: Pay Components (License/Certifications)

The License/Certification Salary request has been successfully submitted pending the approval of Central HR.

The screenshot shows a mobile application interface for a 'DPR Salary Change' transaction. At the top, there is a navigation bar with a back arrow and the text 'HOME' on the left, and 'DPR Salary Change' on the right. Below the navigation bar, a green banner contains a success message: '✓ Your transaction request for Kaylani Oleary has been successfully submitted for approval.' Below this, the user's profile is shown: 'Kaylani Oleary, Procurement Contracting Ofc 1'. The main content area is titled 'Submit Confirmation' and contains a section for 'DPR Salary Change Approval'. This section shows the transaction status as 'Pending' with a 'View/Hide Comments' link. Below the status, there is a 'DPR Salary Change Approval' section with a 'Pending' status and a 'Multiple Approvers' list including 'Central HR approver'. At the bottom, there is a 'Comments' section with a comment from 'Felica Krebs at 02/11/22 - 9:50 AM' stating 'Request to add the verified CPPO Certification effective 01/10/2022'.

Lecture 5: Review Salary Change via Job Data (Salary Grade)

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the HR Administration interface. The left sidebar contains a menu with 'Job Data' highlighted. The main content area is titled 'Job Data' and includes a 'Find an Existing Value' button and a 'Keyword Search' button. Below these are search criteria fields: 'Empl ID begins with', 'Empl Record =', 'Name begins with', 'Last Name begins with', 'Second Last Name begins with', 'Alternate Character Name begins with', and 'Middle Name begins with'. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lecture 5: Review Salary Change via Job Data (Salary Grade)

4. Select the **Compensation** tab.
5. Within the **Pay Components** section, select the **Amounts** tab.

Notice the most recent record. **1 of 2**, the **Effective Date**, **Effective Sequence**, **Action**, **Reason**, and the new **Compensation Rate**

Notice the **Comp Rate** with the new Merit Increase.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Claudette Mclean Employee Empl ID 00218029 Empl Record 0

Compensation Details 1 of 2

Effective Date 11/24/2021
Effective Sequence 1
HR Status Active
Payroll Status Active

Action Pay Rate Change
Reason Merit
Job Indicator Primary Job

Compensation Rate 1,670.27 USD *Frequency B Biweekly

Comparative Information

Frequency	Rate	Currency	Hourly	Monthly
Biweekly	1,670.269500	USD	20.878369	3,618.917250
Annual	43,427.007000	USD		

Default Pay Components Contract Change Prorate Option

Pay Components

Amounts | Controls | Changes | Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,610.269500	USD	B			
2 PRMPYK	0	60.000000	USD	B			

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Creditable Adjusted Dates

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lecture 5: Review Salary Change via Job Data (Salary Grade)

6. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

HR Administration

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Claudette Mclean Employee Empl ID 00218029 Empl Record 0

Compensation Details 1 of 2

Effective Date 11/24/2021 Action Pay Rate Change
Effective Sequence 1 Reason Merit
HR Status Active Job Indicator Primary Job
Payroll Status Active

Compensation Rate 1,670.27 USD *Frequency B Biweekly

Go To Row

Comparative Information

Pay Rates

Frequency	Rate	Currency	Frequency	Rate	Currency
Biweekly	1,670.269500	USD	Hourly	20.878369	USD
Annual	43,427.007000	USD	Monthly	3,618.917250	USD

Default Pay Components Contract Change Prorate Option

Pay Components 1-2 of 2

Amounts | Controls | **Changes** | Conversion | Filter

*Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent		
1 MDBKLY	0	76.679500	USD	Biweekly	5.000	5.000	+	-
2 PRMPYK	0	0.000000	USD	Biweekly	0.000	0.000	+	-

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Creditable Adjusted Dates

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Lecture 5: Review Salary Change via Job Data (Salary Grade)

Notice the displayed record **2 of 2**, **Effective Date**, and the previous **Compensation Rate** and ***Rate Code** before the merit increase.

The screenshot displays the HR Administration interface for employee Claudette Mclean (Empl ID: 00218029). The 'Compensation' tab is active, showing details for record 2 of 2. The effective date is 12/28/2020, and the compensation rate is 1,593.59 USD. The pay rates table shows biweekly and annual rates. The pay components table lists two rate codes: MDBKLY and PRMPYK.

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	1,533.590000	USD	B			
2 PRMPYK	0	60.000000	USD	B			

Lecture 5: Review Salary Change via Job Data (Salary Step)

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

Human Resources (HCM) **HR Administration**

Job Information ^

- Job Data**
- Workforce Job Summary
- Manage Employee Profile

Headcount v

Labor Administration v

HR Configuration v

Dotted Line

Export Org Chart

OnBoarding v

OffBoarding v

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Include History Correct History Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Lecture 5: Review Salary Change via Job Data (Salary Step)

4. Select the **Salary Plan** tab.

Notice the most **Current** record **1 of 1**, the **Effective Date**, **Action**, **Reason**, **Step** and **Step Entry Date**. The non-job basis employee's salary change request for the merit increase from **Step 9 to Step 10** was processed with the effective date of **1/31/2022**.

The screenshot displays the 'HR Administration' interface for an employee. The 'Salary Plan' tab is selected. The employee's details are: Ofir Doty, Employee, Empl ID 00014872, Empl Record 0. The 'Salary Plan Details' section shows a single record (1 of 1) with the following information:

Effective Date	01/31/2022	Action	Pay Rate Change
Effective Sequence	0	Reason	Merit
HR Status	Active		
Payroll Status	Active		
Salary Admin Plan	K	Grade Entry Date	01/31/1994
Grade	035	Step Entry Date	01/31/2022
Step	10		

Additional details include: Salary Admin Plan K, GSAF - OPEIU Local 100, Grade 035, and Step 10. The record is marked as 'Current'. Navigation buttons at the bottom include Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, and Include History.

Lecture 5: Review Salary Change via Job Data (Salary Step)

5. Select the **Compensation** tab.
6. Within the **Pay Components** section, select the **Amounts** tab.

Notice the **Comp Rate** with the new Merit Increase.

HR Administration

Work Location Job Information Job Labor Payroll Salary Plan **Compensation**

Ofir Doty Employee Empl ID 00014872 Empl Record 0

Compensation Details ? 1 of 1

Effective Date 01/31/2022 Effective Sequence 0 HR Status Active Payroll Status Active Action Pay Rate Change Reason Merit

Go To Row

Compensation Rate 2,215.80 USD Frequency B Biweekly

Comparative Information ?

Pay Rates ?

Default Pay Components Contract Change Prorate Option

Pay Components ? 1-2 of 2

Amounts Controls Changes Conversion

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDBKLY	0	2,145.800000	USD	B			
2 PRMPAY	0	70.000000	USD	B			

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation Creditable Adjusted Dates

Lecture 5: Review Salary Change via Job Data (Salary Step)

7. Within the **Pay Components** section, select the **Changes** tab to view the comparative information.

Notice the **MDBKLY Change Amount** and the **Change Percent**.

The screenshot displays the HR Administration interface for an employee named Ofir Doty (Empl ID: 00014872). The 'Compensation' tab is active, showing details for a compensation record effective on 01/31/2022. The current compensation rate is 2,215.80 USD, paid biweekly. Below this, the 'Pay Components' section is expanded to the 'Changes' tab, which contains a table of rate changes.

Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent
1 MDBKLY	0	88.060000	USD	Biweekly		4.279
2 PRMPAY	0	0.000000	USD	Biweekly		0.000

Lecture 5: Review Salary Change via Job Data (Pay Components)

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the HR Administration interface. The left sidebar contains a menu with 'Job Data' highlighted. The main content area is titled 'Job Data' and includes a search bar with 'Find an Existing Value' and 'Keyword Search' buttons. Below the search bar is a 'Search Criteria' section with several fields: 'Empl ID' (highlighted with a red box), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name'. Each field has a 'begins with' dropdown and an input box. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', along with 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

Lecture 5: Review Salary Change via Job Data (Pay Components)

4. Select the **Compensation** tab.

Notice the **Current** record **1 of 1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee's salary change request for the Leadworker (LEAD) pay component was approved and processed with the effective date of **1/31/2022**.

The screenshot displays the HR Administration interface for an employee named Georgie Looper (Empl ID: 00197376). The 'Compensation' tab is selected. The 'Compensation Details' section shows a record with an effective date of 01/31/2022, an action of 'Pay Rate Change', and a reason of 'Components of Pay'. The compensation rate is 4,600.61 USD, and the frequency is Biweekly. The 'Pay Components' section shows a table of components, with the 'LEAD' component highlighted.

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 EDINCP	0	155.780000	USD	B			
2 FIRBA	0	50.770000	USD	B			
3 FIRPRM	0	856.420800	USD	B		24.000	MDCMAX
4 HZDFIR	0	125.000000	USD	B			
5 LEAD	0	155.770000	USD	B			
6 MDBKLY	0	3,256.870000	USD	B			

Lecture 5: Review Salary Change via Job Data (License & Certification)

Navigate to Job Data: **Human Resources HCM > HR Administration > Job Information > Job Data**

1. Select **Find an Existing Value**.
2. In the **Empl ID** field, enter the **Employee's 8-digit Numeric Identification Number**.
3. Select **Search**.

The screenshot shows the 'Job Data' search interface in the HR Administration system. The left sidebar contains a navigation menu with 'Job Data' highlighted. The main content area has a 'Find an Existing Value' button and a 'Keyword Search' field. Below this is a 'Search Criteria' section with several search fields: 'Empl ID' (with a dropdown set to 'begins with'), 'Empl Record' (with a dropdown set to '='), 'Name' (with a dropdown set to 'begins with'), 'Last Name' (with a dropdown set to 'begins with'), 'Second Last Name' (with a dropdown set to 'begins with'), 'Alternate Character Name' (with a dropdown set to 'begins with'), and 'Middle Name' (with a dropdown set to 'begins with'). There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lecture 5: Review Salary Change via Job Data (License & Certification)

4. Select the **Compensation** tab.

Notice the **Current** record. **1 of 1**, the **Effective Date**, **Action**, and **Reason**. In the **Pay Components** section, the employee's salary change request to add the **Procurement or Contract Procure (PRCHCT)** pay component was approved and processed with the effective date of **1/10/2022**.

The screenshot shows the HR Administration interface for an employee named Kaylan O'Leary (Empl ID: 00219546). The 'Compensation' tab is selected. The 'Compensation Details' section shows a single record with an effective date of 01/10/2022, an effective sequence of 0, and an active status. The action is 'Pay Rate Change' and the reason is 'Components of Pay'. The compensation rate is 2,876.04 USD, and the frequency is Biweekly. The 'Pay Components' section shows three components: 1. MDBKLY (0), 2. PRCHCT (0), and 3. PRMPAY (0). The PRCHCT component is highlighted with a red box. The 'Current' checkbox is checked.

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	MDBKLY	0	2,674.100000	USD	B		
2	PRCHCT	0	131.940000	USD	B		
3	PRMPAY	0	70.000000	USD	B		

Lesson 6: Activities and Exercises



Lesson 6: Lesson Summary

Now that you have completed the lesson, you should be able to:

- Request Merit Increase for Salary Grade Employee
- Request Merit Increase for Salary Step Employee
- Request Component of Pay
- Request License/Certification.

Lesson 7: Payroll

This lesson will review Define Payroll.

- Review an Employee's Paycheck for a specific pay period.

Lesson 7: Key Terms

Term	Definition
Pay Calendar	Use pay calendars to schedule payroll cycles for your paygroups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates.
Pay Group	A pay group is a logical grouping of employees based on shared characteristics that facilitate payroll processing because of common requirements such as employee type, pay frequency, same country location, and so on. A pay group consolidates a set of employees within a company for payroll processing
Pay Run IDs	Pay Run Ids enable payroll processes to be run for each calendar. A pay run id must be created for each “run”. Pay Run Ids must be created and attached to a pay calendar at the beginning of a new year.
Earnings Codes	An earnings code defines a type of earnings that your organization requires such as regular earnings, vacation, holiday, special earnings.
Deduction Codes	In Payroll for North America, there are two types of deductions, general (non-benefit) deductions and benefit deductions. The system uses different deduction rules depending on the type of deduction that you are setting up.

Lecture 1: Payroll

Navigate to: **Main Menu > Navigator > Human Capital Management > Payroll North America > Payroll Processing USA > Produce Payroll > Review Paycheck**

1. In the **Company** field, select **MDC**.
2. In the **Pay Group** field, select from the employee's **specific Pay Group code**

Pay Group Code	Description	Details
MDC	General Employees	All county employees
NON	Miami-Dade Non-Employees	Foster Grandparent, Service Corps Worker, and Senior Companion
RET	Miami-Dade Retirees	Retirees

Lecture 1: Payroll

3. In the Pay Period End Date field, enter the Pay Period End Date.
4. In the Empl ID field, enter the Employee's 8-digit Numeric Identification Number.
5. Select Search.

Review Paycheck
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Company begins with MDC

Pay Group begins with MDC

Pay Period End Date = 05/31/2020

Off Cycle ?

Page Nbr =

Line Nbr =

Separate Check Nbr =

Paycheck Number =

Empl ID begins with

Name begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Lecture 1: Payroll

6. Select the **individual paycheck** you want to review by clicking on any link in the desired line

Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
MDC	MDC	10/31/2021	N	1	1	0	ADVICE	30969		
MDC	MDC	10/31/2021	N	2	1	0	ADVICE	30970		
MDC	MDC	10/31/2021	N	2	2	0	ADVICE	30971		
MDC	MDC	10/31/2021	N	2	3	0	ADVICE	30972		
MDC	MDC	10/31/2021	N	3	1	0	ADVICE	30976		

Lecture 1: Payroll

1. Select the **Paycheck Earnings** tab to view the employee's **Paycheck Totals**, **hourly rate**, **Other Earnings**, and **Special Accumulators**.

NOTE: The Paycheck Status confirmed means that the paycheck has been issued. If the Paycheck Option reads Advice, it means it was Direct Deposit and if it reads Check it means a physical check was distributed.

2. Select the **drop-down arrow of Page 1 of 2** and select **2 of 2**.

The screenshot displays the 'Paycheck Earnings' interface for employee Kennedy, Matthew J. (Empl ID: 00216718, Company: MDC, Pay Group: FRE, Pay Period End: 05/31/2020, Page 126, Line 7). The interface is divided into several sections:

- Paycheck Information:** Shows 'Paycheck Status' as 'Confirmed' and 'Paycheck Option' as 'Advice'. Other details include Issue Date (06/05/2020), Paycheck Number (3521), and checkboxes for Off Cycle, Reprint, Adjustment, Corrected, and Cashed.
- Paycheck Totals:** A summary table showing Earnings (4,228.10), Taxes (-2,416.20), Deductions (186.76), and Net Pay (6,457.54).
- Earnings:** A section with a pagination control set to '1 of 2'. It includes fields for Begin Date (05/18/2020) and End Date (05/24/2020). Below are three columns: Salaried (Hours: 0.00, Rate: 44.042769, Earnings: 0.00), Hourly (Hours: 0.00, Rate: 0.000000, Earnings: 0.00), and Overtime (Hours: 0.00, Rate: 0.000000, Earnings: 0.00). It also shows State (FL) and Rate Used (Hourly Rate).
- Other Earnings:** A table with columns Code, Description, Rate Used, Hours, Rate, Amount, and Source. A row is highlighted for 'REG' (Regular Hours Pay) with a rate of 44.042769, 48.00 hours, and an amount of 2,114.05.
- Special Accumulators:** A table with columns Code, Description, Hours, Earnings, and Empl Record. A row is highlighted for 'GRS' (Reserved for Gross Wages) with 96.00 hours and 4,228.10 earnings.

Navigation buttons at the bottom include 'Return to Search' and 'Notify'. The footer shows 'Paycheck Earnings | Paycheck Taxes | Paycheck Deductions' and the Miami-Dade County logo.

Lecture 1: Payroll

3. Select **Paycheck Taxes** tab.
4. Select **Tax Details 1** tab to see the taxes for the pay period.

The Tax Class column lists the different types of taxes withheld:

Federal MED/EE - Employee paid Medicare tax (MICA)

Federal Med/ER – Employer-paid Medicare tax (not withheld from the employee's pay) (MICA)

Federal OASDI/EE - Employee paid Social Security tax (FICA)

Federal OASDI/ER - Employer paid Social Security tax (not withheld from the employee's pay) (FICA)

Federal Withholding - Federal withholding tax

State Withholding - State withholding tax (if applicable).

NOTE: ER are not visible on the employee's paycheck in legacy application, they are employer portions.

The screenshot displays a payroll system interface for reviewing a paycheck. The 'Paycheck Taxes' tab is selected and highlighted. The interface shows employee information: Empl ID 00216718, Name Kennedy, Matthew L., Company MDC, Pay Group FRE, and Pay Period End 05/31/2020. The 'Paycheck Information' section includes 'Paycheck Status Confirmed', 'Paycheck Option Advice', 'Issue Date 06/05/2020', and 'Paycheck Number 3521'. The 'Paycheck Totals' section shows Earnings of 4,228.10, Taxes of -2,416.20, Deductions of 186.76, and Net Pay of 6,457.54. The 'Taxes' section is expanded to show a table of tax details.

Tax Entity	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal				MED/EE	4,101.26	-594.74
US Federal				Med/ER	4,101.26	-594.74
US Federal				OASDI/EE	4,101.26	-2,542.97
US Federal				OASDI/ER	4,101.26	-2,542.97
US Federal				Withholding	4,101.26	721.5

Lecture 1: Payroll

The following are the four types of tax classes that can appear in the Class column:

- **Before-Tax** - Indicates that the deduction reduces the employee's taxable wages on the paycheck.
- **After-Tax** – Indicates that the deduction is taken after tax withholdings are calculated, thus not affecting the employee's taxable gross.
- **Nontaxable** – Indicates that the deduction is an employer-paid deduction.
- **Taxable** - These are not actual deductions withheld from the employee's pay. The amount associated with a taxable deduction is the amount added to the employee's taxable gross wages for the pay period.

NOTE: In legacy application, nontaxable deduction class is not visible on the employee's paycheck. These are employer portions.

NOTE: FRS contributions are now a deduction in INFORMS.

The screenshot shows the 'Paycheck Earnings' interface for employee Kennedy, Matthew L. The 'Paycheck Deductions' tab is selected. The interface includes fields for Empl ID (00216718), Name (Kennedy, Matthew L.), Company (MDC), Pay Group (FRE), and Pay Period End (05/31/2020). It also shows 'Paycheck Information' with status 'Confirmed' and 'Paycheck Number' 3521. A 'Paycheck Totals' box shows Earnings of 4,228.10, Taxes of -2,416.20, Deductions of 186.76, and Net Pay of 6,457.54.

The 'Deductions' section is expanded to show 'Deduction Details 1' with the following table:

Deduction Code	Description	Class	Amount	Calculated Base
DCFFLF	DCFF Basic Life Ins Trust	Nontaxable Benefit	8.90	109,930.75
STDIS	Short-Term Disability Insuranc	After-Tax	3.80	259.99
FRS	FRS Contribution	Before-Tax	126.84	4,228.10
FRS	FRS Contribution	Nontaxable Benefit	1,035.88	4,228.10
FF1403	Firefighters Union Local 1403	After-Tax	38.94	
FFCHAR	Firefighters Charities	After-Tax	4.00	
FRPAC	Firepac	After-Tax	5.00	
LIFE5X	Minnesota Opt Life (5X)	After-Tax	7.75	

Below the table, there is a 'Garnishments' section and a 'Net Pay Distribution' table showing the net pay of 6,457.54 deposited into a checking account.

Lecture 1: Payroll

1. Select the **Paycheck Deductions** tab.
2. Select the **Deduction Details 1** tab to view the employee's deductions for the pay period.
3. Select the **Garnishment** arrow to view the general deductions.

NOTE: Garnishments section displays court related deductions such as Child Support.

Garnishments							1 of 1	View All
Priority	1	ID	GRN191	Type	Tax Levy			
Vendor	GARNISH-001			AP Status				
Law Source	\$U	Rule ID	LEVY/S	Tax Levy/Single				
Disposable Earnings	2,364.32	Proration Rule ID						
Less Exemption	482.69							
Less Other Garnishments								
Maximum Deduction	1,881.63							
Limited Amount	1,881.63	Limited Type	Deduct Not Limited					
Garnishment Amount	1,881.63							
Company Fee								
Payee Fee								
Total Deducted	1,881.63	<input type="checkbox"/> Adjusted Due To Included Fee						

Lecture 1: Payroll

The Paycheck **Deductions Details 2** tab displays the detailed deductions/contributions such as benefits plan and plan type.

Paycheck Earnings | **Paycheck Taxes** | **Paycheck Deductions** | **Review Paycheck**

Empl ID 00216718 Name Kennedy, Matthew L.
Company MDC Pay Group FRE Pay Period End 05/31/2020 Page 126 Line 7 Separate Check

Paycheck Information

Paycheck Status	Confirmed	Paycheck Option	Advice
Issue Date	06/05/2020	Paycheck Number	3521
<input type="checkbox"/> Off Cycle	<input type="checkbox"/> Reprint	<input type="checkbox"/> Adjustment	<input type="checkbox"/> Corrected
<input type="checkbox"/> Cashed			

Paycheck Totals

Earnings	4,228.10
Taxes	-2,416.20
Deductions	186.76
Net Pay	6,457.54

Deductions

1-8 of 9 | View All

Deduction Code	Plan	Benefit Record	Plan Type	Not Taken	Reason
DCFFLF	FLIFE	0	Life		
STDIS	STDHGH	0	Short-Term Disability		
FRS	HB	0	Florida Retirement System		
FRS	HB	0	Florida Retirement System		
FF1403		999	General Deduction		
FFCHAR		999	General Deduction		
FRPAC		999	General Deduction		
LIFE5X		999	General Deduction		

Garnishments

Net Pay Distribution

Check/Advice Number	Account Type	Bank ID	Account Number	Amount
3521	Checking	87854321	XXXX5678	6,457.54

Return to Search | Notify

Paycheck Earnings | Paycheck Taxes | Paycheck Deductions

Lecture 2: Print Paycheck

Navigation: Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self-Service Paycheck

1. Select the **Company**, **Pay Group**, and **Empl ID** and select **Search**.
2. Select the **Employee Record** from the **Search Results**

Review Self Service Paycheck
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Company

Pay Group

Empl ID

Name

Case Sensitive

[Basic Search](#)

Search Results

View All

Company	Pay Group	Empl ID	Name
MDC	MDC	00400873	Crespi, Christina

Lecture 2: Print Paycheck

3. Select **View Paycheck** under the **View Self-Service Paycheck** section.

View Self Service Paycheck
Christina Crespi

▼ Select Paycheck




1-2 of 2 | View All

Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
12/03/2021	View Paycheck	Miami Dade County	11/15/2021	11/28/2021	\$1135.97	60372	<input checked="" type="checkbox"/>
11/19/2021	View Paycheck	Miami Dade County	11/01/2021	11/14/2021	\$1319.22	62254	<input checked="" type="checkbox"/>

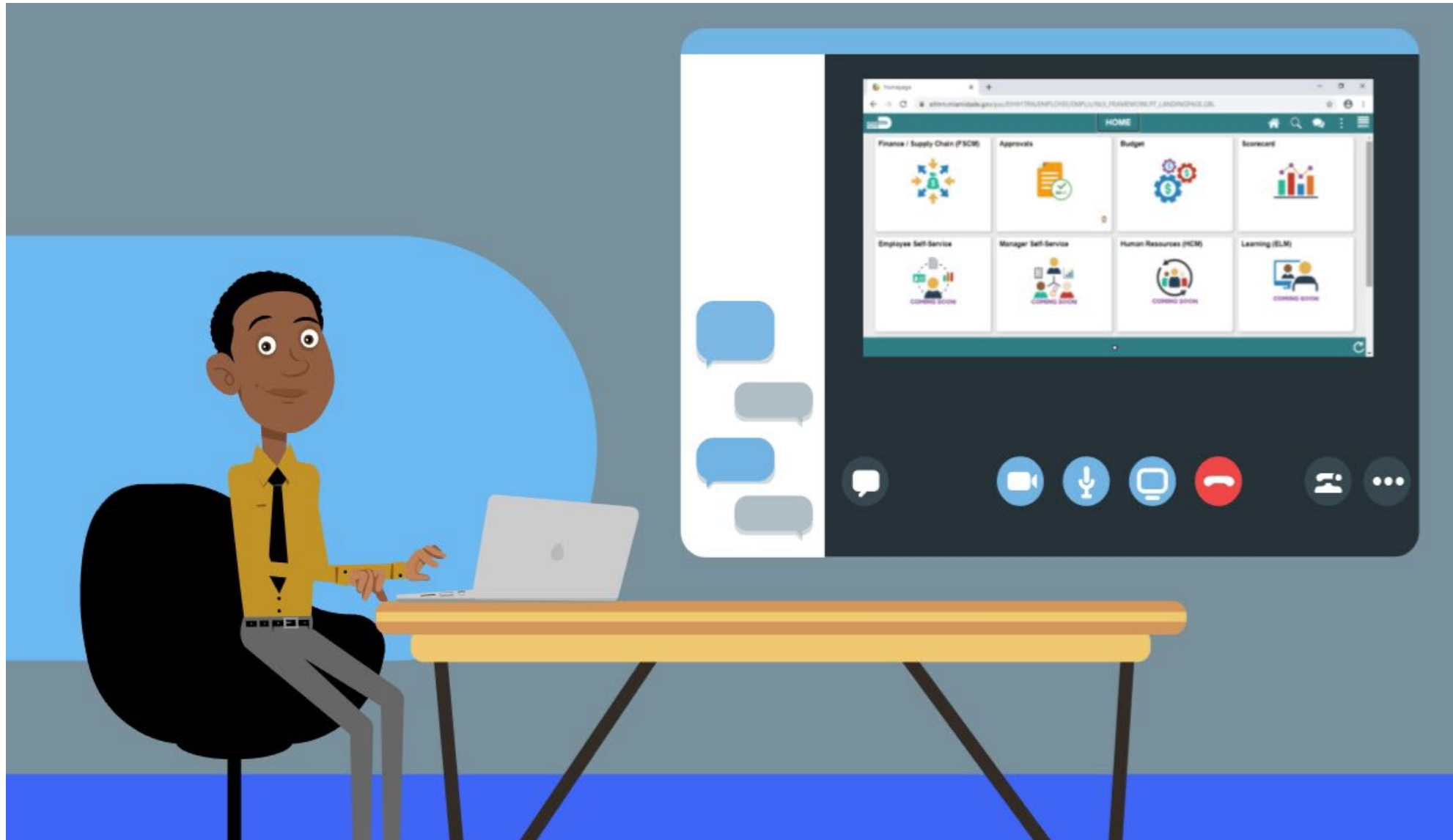
[Return to Search](#)

Lecture 2: Print Paycheck

- The employee's paycheck will be available to view. The DPR can print or save the paycheck as a PDF document.

Miami Dade County 111 NW 1st Street, Ste 2630 Miami, FL 33128-1995				Pay Group: MDC-General Employees Pay Begin Date: 11/15/2021 Pay End Date: 11/28/2021		Business Unit: PH Advice #: 000000000060372 Advice Date: 12/03/2021			
Christina Crespi 112 NW Second Street Miami, FL 33128		Employee ID: 00400873 Department: PH0810000-NEWBERG WAREHOUSE Location: OPEN LAND/VACANT LOT/CANAL Job Title: Electrician Pay Rate: \$1,900.70 Biweekly		TAX DATA:		Federal		FL State	
				Tax Status: Single N/A Allowances: N/A 0 Addl. Percent: N/A Addl. Amount:					
HOURS AND EARNINGS					TAXES				
Description	Rate	Current Hours	Earnings	YTD Hours	Earnings	Description	Current	YTD	
AdminHrs	23.758750	40.00	\$950.35	84.00	1,995.74	Fed Withholding	155.66	370.60	
AdminHrs	23.758750	24.00	570.21		0.00	Fed MED/EE	27.56	60.45	
Holiday	23.758750	16.00	380.14	24.00	570.21	Fed OASDUEE	117.84	258.46	
Car Allowa			0.00		100.00				
Night Diff			0.00	16.00	17.83				
Overtime H			0.00	7.00	249.47				
Regular Ho			0.00	52.00	1,235.46				
TOTAL:		80.00	1,900.70	183.00	4,168.71	TOTAL:	301.06	689.51	
BEFORE-TAX DEDUCTIONS			AFTER-TAX DEDUCTIONS			EMPLOYER PAID BENEFITS			
Description	Current	YTD	Description	Current	YTD	Description	Current	YTD	
FRS Contribution	57.02	122.06	GARNChild (Amount)	50.00	100.00	Medical Select Insurance Plan	519.23	1,038.46	
			GARNChild (Co. Fee)	2.00	4.00	Basic Life Insurance	4.00	8.00	
			GARN-Tax Levy	250.40	672.70	FRS Contribution	205.66	440.24	
			GARNWrit (Amount)	81.25	81.25				
			GARNWrit (Co. Fee)	2.00	2.00				
			Govt Supervisors Assoc Dues	21.00	42.00				
TOTAL:	57.02	122.06	TOTAL:	406.65	901.95	*TAXABLE			
TOTAL GROSS		FED TAXABLE GROSS		TOTAL TAXES		TOTAL DEDUCTIONS		NET PAY	
Current	1,900.70	1,843.68	301.06	463.67	1,135.97				
YTD	4,168.71	4,046.65	689.51	1,024.01	2,455.19				
NET PAY DISTRIBUTION									
Advice #000000000060372	Account Type	Account Number	Deposit Amount						
	Checking	XXXXXXXX6789	500.00						
	Checking	XXXXXXXX6075	635.97						
TOTAL:			1,135.97						
MESSAGE:									
		Please consider the environment before printing your paystub		Mission Statement: "Delivering excellent public services that address our community's needs and enhance our quality of life, now and in the future."					
									

Lesson 7: Activities and Exercises



Lesson 7: Lesson Summary

Now that you have completed the lesson, you should be able to:

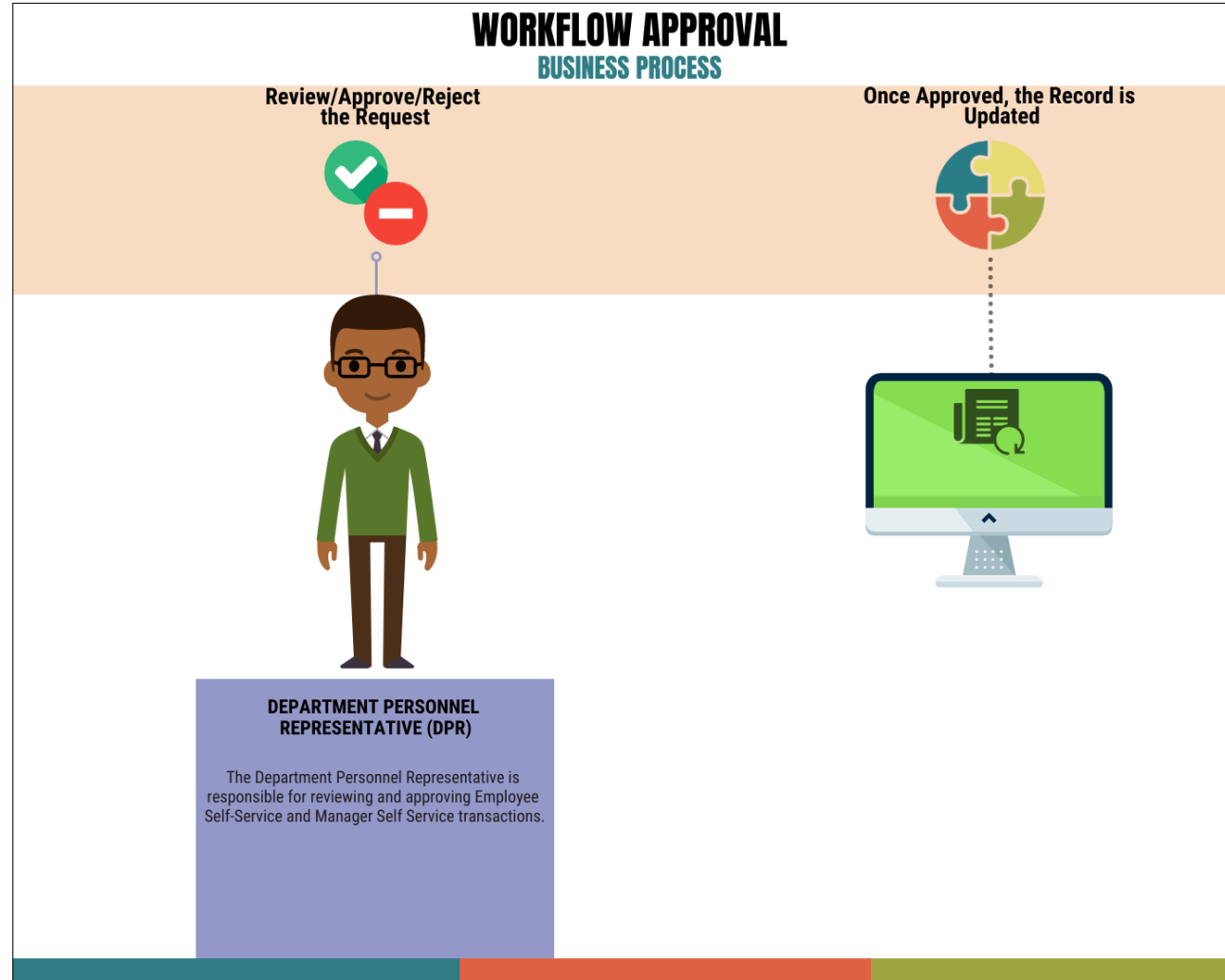
- Review Employee's Paycheck for a specific pay period

Lesson 8: Workflow Approvals

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

- Review and Approve License/Certification Requests

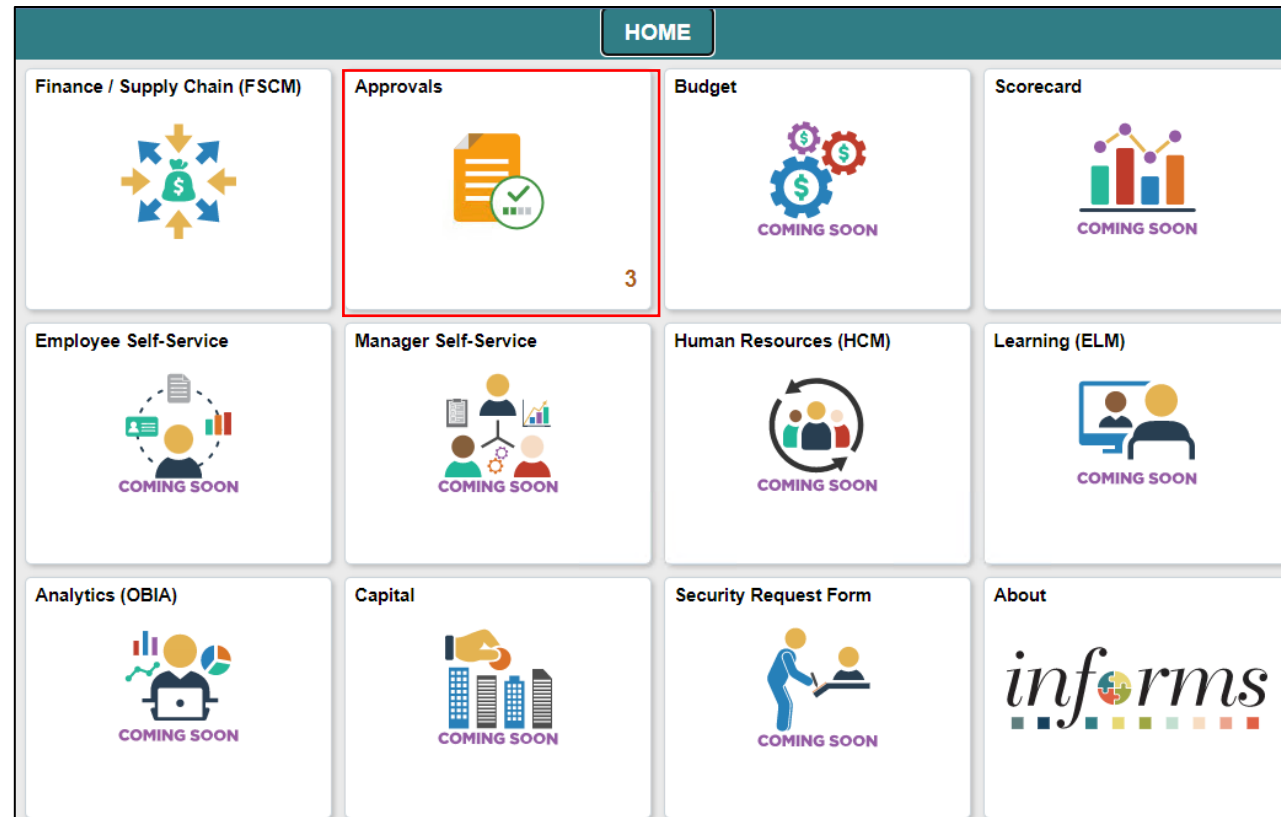
Lesson 8: Workflow Approvals



Lesson 8: Workflow Approvals

Navigate to Approvals: **Approvals**

NOTE: The number on the bottom right side of the Approvals icon indicates how many items are pending approval.



Lesson 8: Workflow Approvals

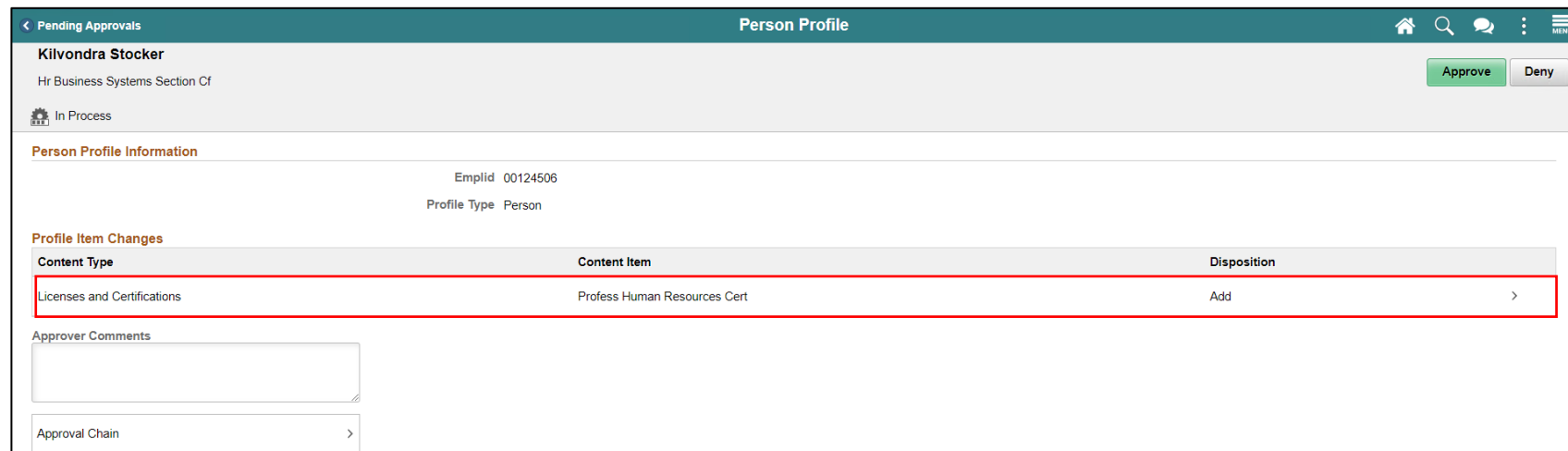
1. Select the **Licenses and Certifications** request.



The screenshot shows a 'Pending Approvals' interface. On the left, there is a sidebar with 'View By' set to 'Type' and a list of categories: 'All' (3 items) and 'Person Profile' (3 items). The main area displays a table of pending requests. The third row, for 'Person Profile' of 'Kilvondra Stocker' with 'Licenses and Certifications(1)', is highlighted with a red border. The table columns include 'Profile Type', 'Request Details', and 'Status/Date'.

Profile Type	Request Details	Status/Date
Person	Licenses and Certifications(1)	Routed 01/20/2022
Person	Degrees(1)	Routed 02/18/2022
Person	Licenses and Certifications(1)	Routed 02/18/2022

2. Select the **Profile Item Changes** content item to view the request before approving.

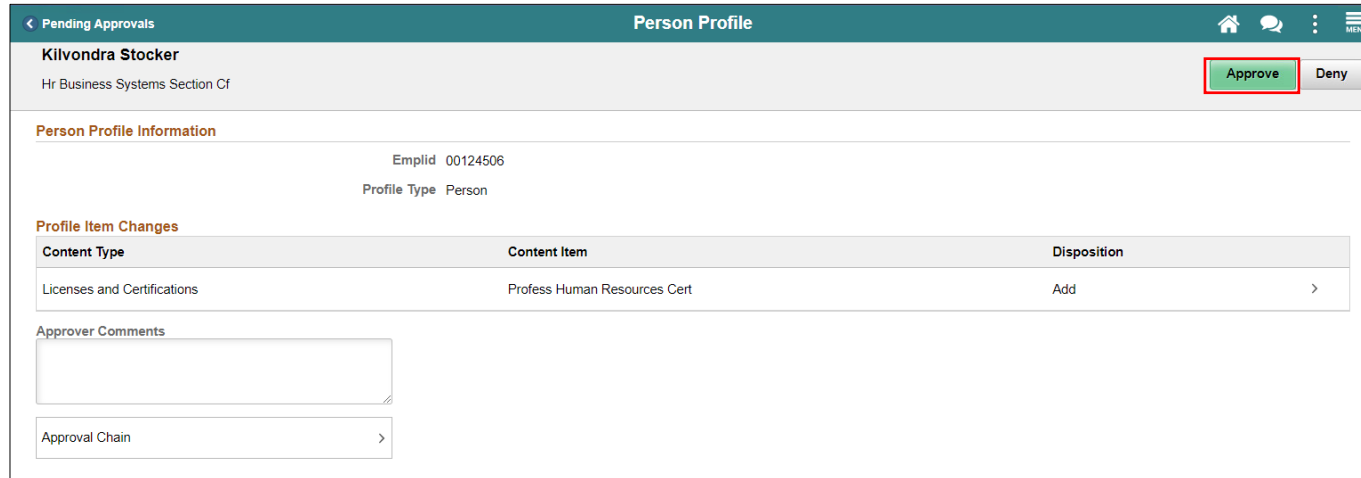


The screenshot shows the 'Person Profile' page for 'Kilvondra Stocker'. The page includes a header with 'Approve' and 'Deny' buttons, and a section for 'Person Profile Information' with fields for 'Emplid' (00124506) and 'Profile Type' (Person). Below this is the 'Profile Item Changes' section, which contains a table with columns for 'Content Type', 'Content Item', and 'Disposition'. The first row, 'Licenses and Certifications' with 'Profess Human Resources Cert' and 'Add' disposition, is highlighted with a red border. At the bottom, there is an 'Approver Comments' text area and an 'Approval Chain' link.

Content Type	Content Item	Disposition
Licenses and Certifications	Profess Human Resources Cert	Add

Lesson 8: Workflow Approvals

3. Select **Approve**.



Pending Approvals **Person Profile**

Kilvondra Stocker
Hr Business Systems Section Cf

Approve **Deny**

Person Profile Information

Emplid 00124506
Profile Type Person

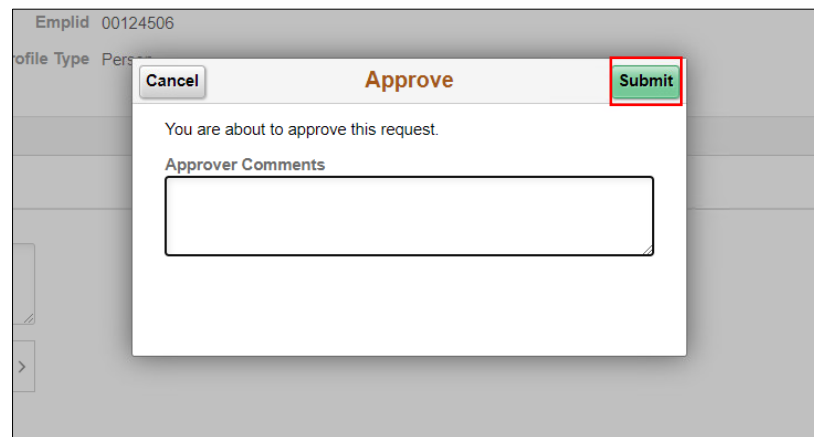
Profile Item Changes

Content Type	Content Item	Disposition
Licenses and Certifications	Profess Human Resources Cert	Add

Approver Comments

Approval Chain

4. Select **Submit**.



Emplid 00124506
Profile Type Person

Cancel **Approve** **Submit**

You are about to approve this request.

Approver Comments

Lesson 8: Workflow Approvals

The pending and approved License and Certifications can be found on the Manage Employee Profile section.

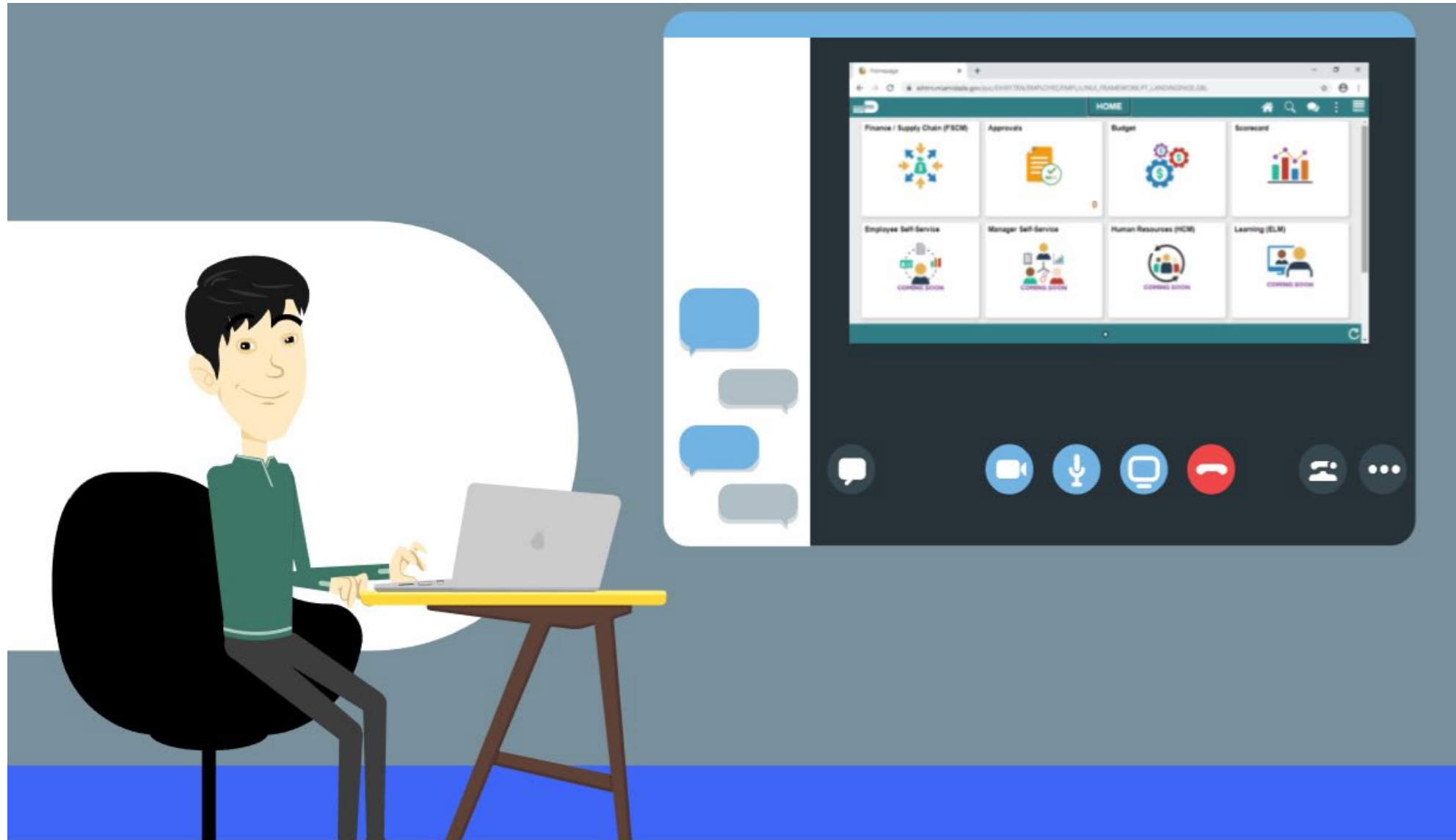
Navigate to Manage Employee Profile: **Human Resources (HCM) > HR Administration > Job Information > Manage Employee Profile.**

The screenshot displays the 'Person Profile' page in the HR Administration system. The left sidebar shows navigation options: Job Information, Workforce Job Summary, Manage Employee Profile (highlighted), Headcount, Labor Administration, and HR Configuration. The main content area shows the profile for Kilvondra Stocker (Empl ID 00124506). The 'Approvals' section is expanded and highlighted with a red box, showing a clock icon for '1 item(s) pending approval' and a green checkmark for '1 item(s) approved (since 09/27/2021)'. Below this are tabs for Education, Qualifications, Veterans' Preference, Additional Information, and MDC Blue Book. At the bottom, a 'Degrees' table is visible with the following data:

ID	Degree	Major Code	Attachments
BS	Bachelor of Science	Public Administration	
HSD	High School Diploma		

Note: Recently approved items will appear with a green check icon. Pending approvals will appear with a clock icon.

Lesson 8: Activities and Exercises



Lesson 8: Lesson Summary

Now that you have completed the lesson, you should be able to:

- Review and Approve License/Certification Requests

Lesson 9: Reports and Queries

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

- Understand the list of Reports:
 - **RPT-HR-508:** Combo Code Summary
 - **RPT-HR-573:** Safe Driving Award
 - **RPT-HR-530:** Active and LOA Employee Counts by Business Unit
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Lesson 9: Reports and Queries

Refer to **HCM 101: Human Resources Fundamentals** to gain step by step instructions to run the following:

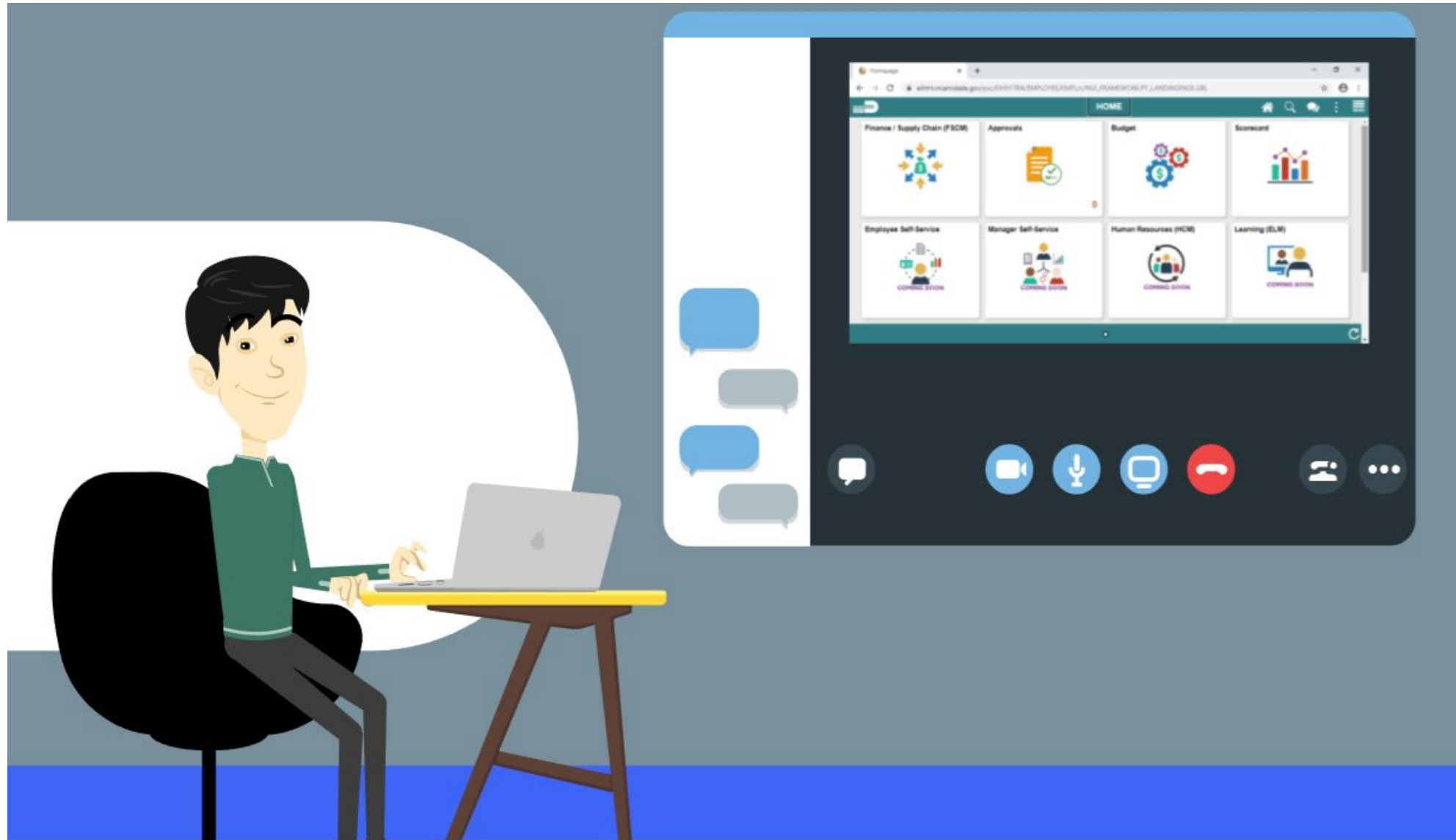
Report Name	Description
Safe Driving Award	Used to obtain Departmental Employees with Safe Driving Award with Amount and Pay Period Date
Combo Code Summary	Used to obtain Departmental Combination Codes for Position Budget Funding related to Position Management
Active and LOA Employee Counts by Business Unit	Used to obtain active and leave of absence employee counts
Overtime and Earning Code, Detail Report	Used to obtain overtime and earning code details

Lesson 9: Lesson Summary

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

- Understand the list of Reports:
 - **RPT-HR-508:** Combo Code Summary
 - **RPT-HR-573:** Safe Driving Award
 - **RPT-HR-530:** Active and LOA Employee Counts by Business Unit
 - **RPT-HR-536:** Overtime and Earning Code, Detail Report

Lesson 9: Activities and Exercises



Module 3: Course Summary

Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

Course Content Summary

Congratulations on completing the Personnel Changes. You now understand how to:

- Submit Job Change
- Modify Position
- Define Department/Position Budget Data
- Submit Position Change
- Submit Job Data Changes that Impact Benefits
- Submit HR Transactions
- Submit Salary Changes
- Workflow Approvals

For more information on INFORMS, please visit www.miamidade.gov/informs

Additional Training and Job Aids

If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits:

- Add Position Budget Funding
- Budget Position Approval
- Compensation Position Approval
- Create New Position
- Inactivate Position
- Inactivate Position Budget Funding
- Lateral Employee Transfer
- Lic/Certification Pay Components
- Update Employee Status
- Workflow Approvals
- Modify Position – Reports to Change
- Pay Components (LW)
- Submitting Merit Increases for Salary Grade Employees
- Submitting Merit Increases for Salary Step Employees
- Update Position Budget Funding
- Verify New Position Approval
- Verify Reports to Change via Job Data
- View Employee Paycheck

For additional information, be sure to visit: www.miamidade.gov/informs



CONGRATULATIONS

Congratulations on successfully completing the Personnel Changes course!

DPR 302 – Departmental HR - Personnel Changes



Appendix

We are on Break.
Please return at 12:45 pm





We are on Break.
Please return at
12:45 pm

