

Course ID: DPR 304

Course: Departmental HR - Updating Team Information

Ground Rules



Be on time



Attendance



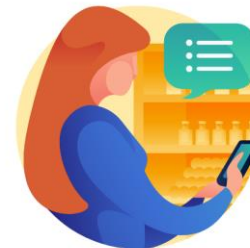
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

Course Overview

Course Description	<p>This course provides a comprehensive review of the Updating Team Information processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: Updating Team Information<ul style="list-style-type: none">○ Discipline Management○ Retirement and Voluntary Separation○ Involuntary Separation Approvals• Module 3: Course Summary
Training Audiences	<ul style="list-style-type: none">• Department Personnel Representative (DPR)• Manager
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help• HCM 101 – Introductory Course - Human Resources Fundamentals

Course Overview, Continued

Other Related Courses	<ul style="list-style-type: none">• DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)• DPR 302 – Departmental HR - Personnel Changes• DPR 303 – Departmental HR - Time Management• DPR 321 – Departmental HR - Recruitment
Estimated Duration	<ul style="list-style-type: none">• 5 Hours

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of the Business Process

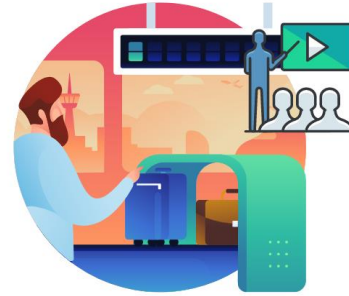
The End-to-End Business Process

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

- Record and manage disciplinary records of employees
- Record and submit retirement and resignations of employees
- Record and submit involuntary separation of employees

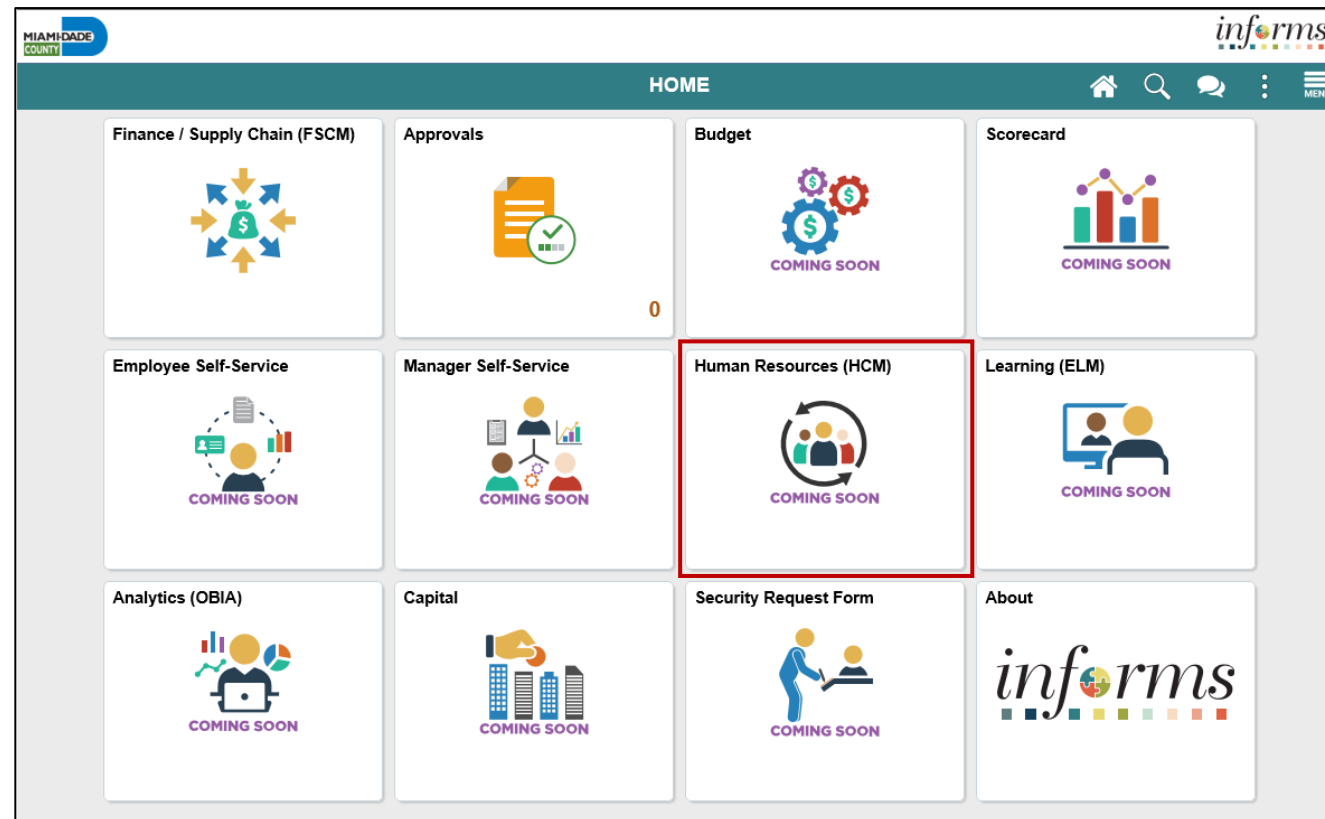
Roles and Responsibilities

The roles and responsibilities associated with this course and will play a part in conducting the related business processes for the County:

Role	Responsibilities
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
Manager	The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.

Navigation

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



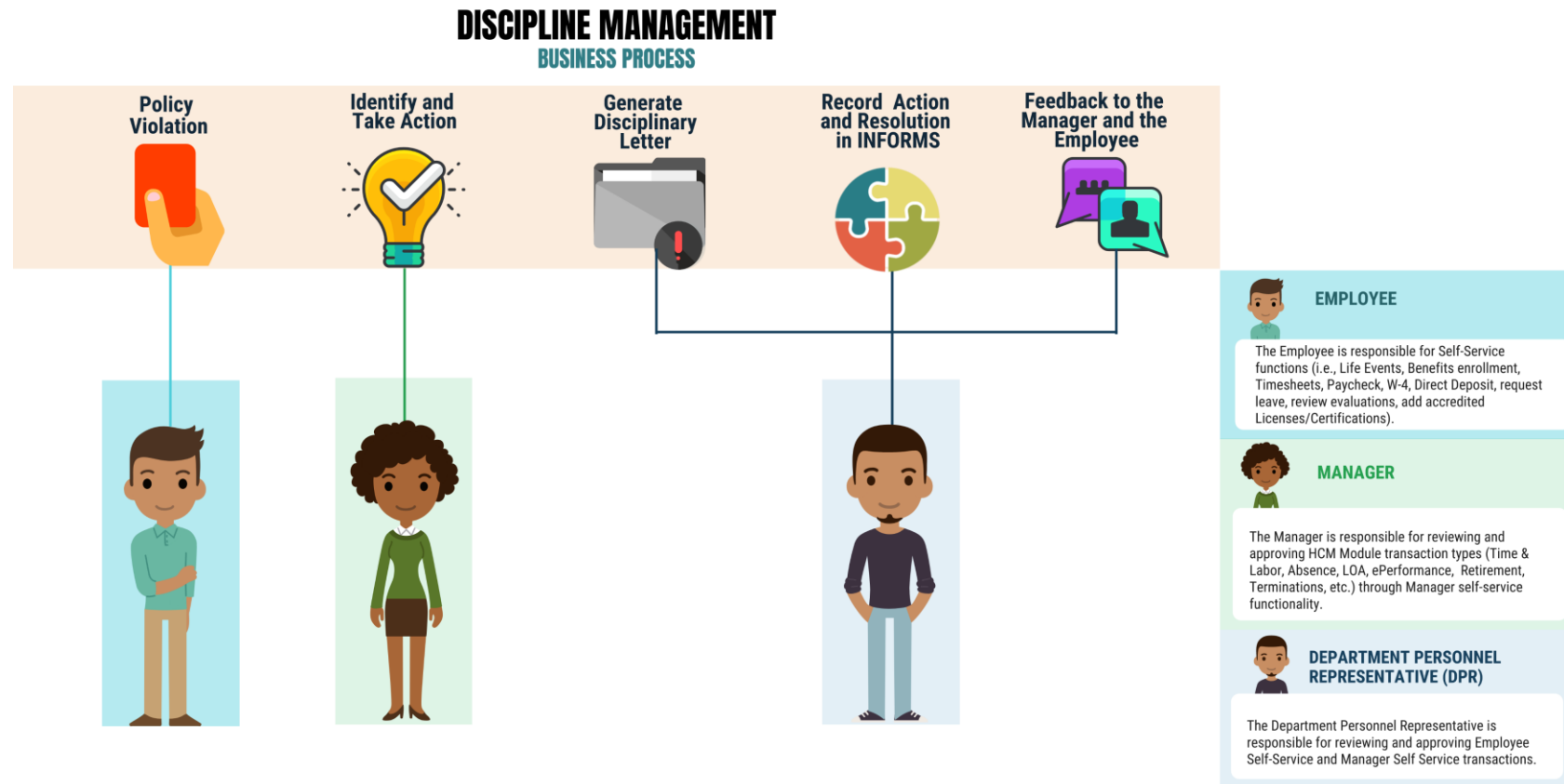
Purpose and Benefits to Business Process

The purpose and benefits of Updating Team Information business process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager 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 – Leave of Absence (LOA), retirees, and benefit billing all in one system

End-to-End Business Process

INFORMS Human Resources (HCM) allows DPRs to record and manage disciplinary records of employees, retirement and resignation requests of employees, involuntary separation of employee, and approve payroll transactions.



Introduction to Activities and Exercises

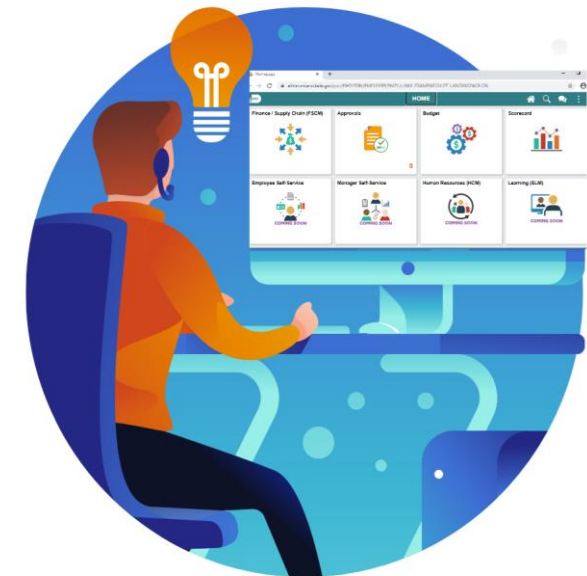
- You will take part in two types of hands-on learning throughout this course.



Instructor
Demo



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of the Business Process

The End-to-End Business Process

Introduction to Demonstrations and Exercises

Module 2: Updating Team Information

Module Topics

Module Introduction

Lesson 1: Discipline Management

Lesson 2: Retirement and Voluntary separation Approvals

Lesson 3: Involuntary separation Approvals

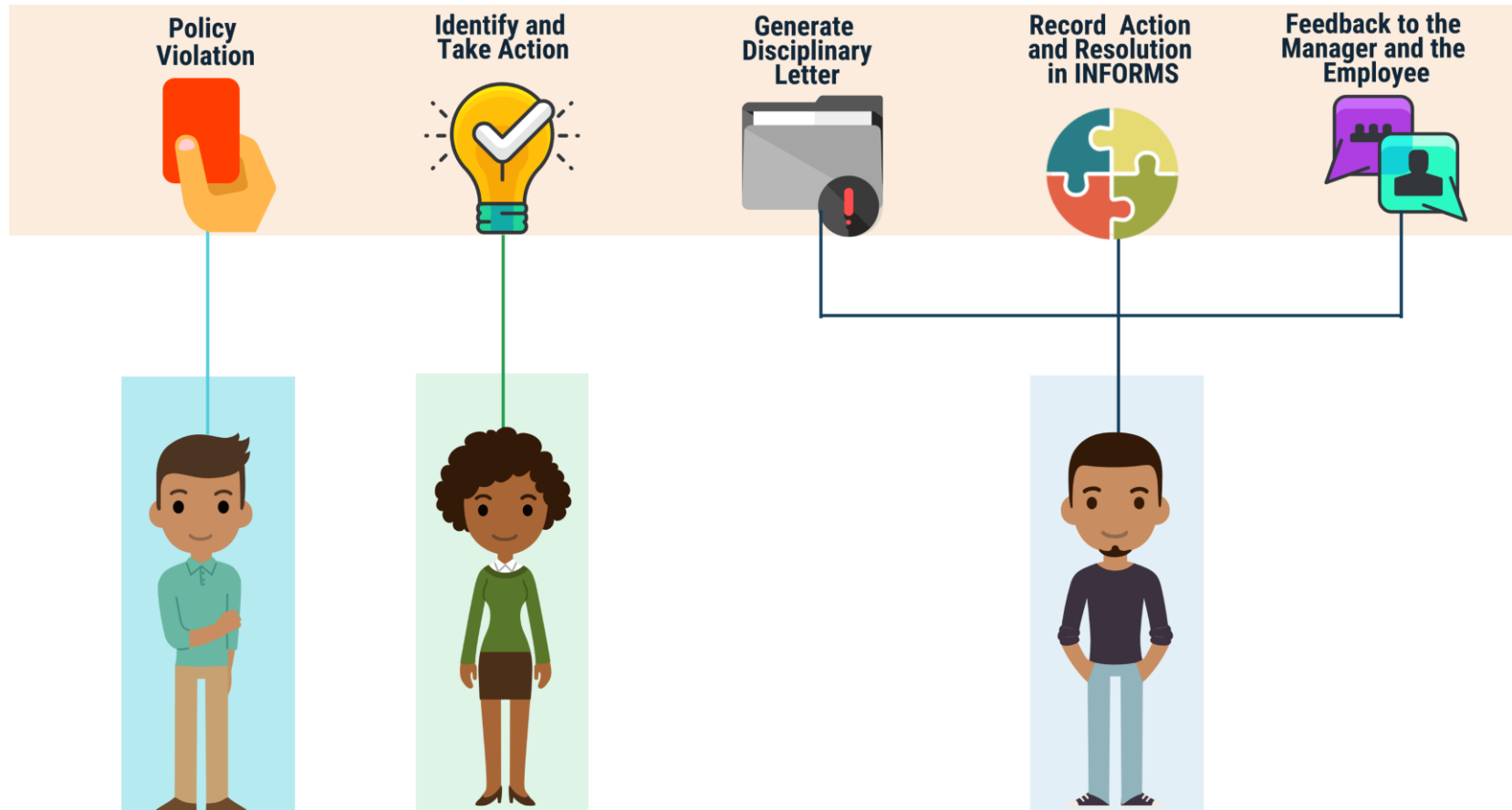
Lesson 4: Payroll Approvals

Lesson 1: Discipline Management

- Record employee Disciplinary Action and Action Taken Records
- Record employee Disciplinary Resolution Records

Lesson 1: Discipline Management Continued

DISCIPLINE MANAGEMENT BUSINESS PROCESS



EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).



MANAGER

The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.



DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

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

Lesson 1: Key Terms

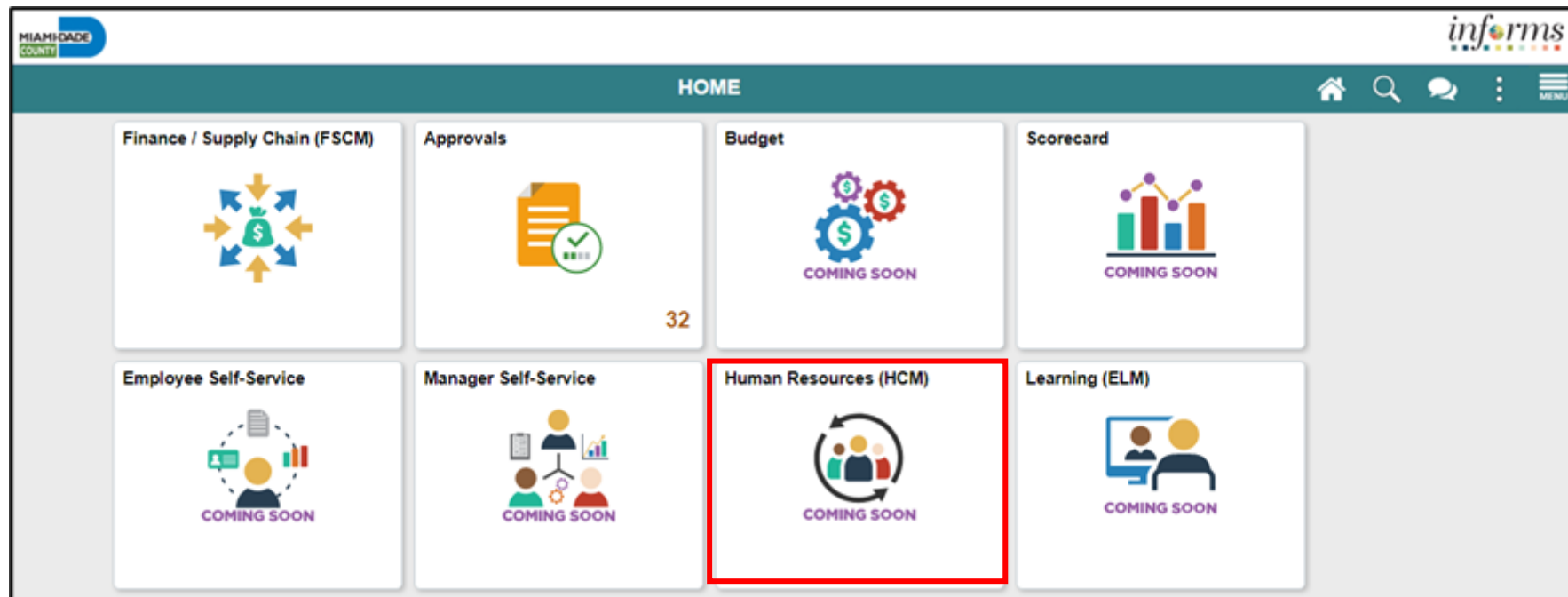
Term	Definition
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
Disciplinary Action	Corrective action to reprimand the employee based on the violation.
Disciplinary Letter	A written memo addressed to the employee for the violation.
Disciplinary Resolution	Recommended and final action that the County will take to resolve the violation.
Violations	Policy or departmental-based offenses made by the employee.

Lesson 1: Discipline Management Continued

Record a Disciplinary Action and Action Taken

As a DPR, create a disciplinary action and disciplinary action taken record in INFORMS.

1. Log into INFORMS and select **Human Resources (HCM)** from the home landing page below.



Lesson 1: Discipline Management Continued

2. Select **HR Administration**.



Lesson 1: Discipline Management Continued

3. Select **Labor Administration** and then select **Record Administrative Actions**.

The screenshot displays the HR Administration interface. On the left is a navigation menu with the following items: Job Information, Headcount, Labor Administration (highlighted with a red box), Record Administrative Actions (highlighted with a green box), HR Notification, HR Configuration, Dotted Line, Export Org Chart, and OnBoarding. The main content area is titled "Record Administrative Actions" and includes a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a green button labeled "Find an Existing Value". Under the "Search Criteria" section, there are five search fields: "Empl ID" (dropdown: begins with, text input), "First Name" (dropdown: begins with, text input), "Last Name" (dropdown: begins with, text input), "Payroll Status" (dropdown: =, dropdown menu), and "Employee Classification" (dropdown: begins with, text input).

Lesson 1: Discipline Management Continued

4. Populate the **Search Criteria** as needed, and then select **Search**.

The screenshot displays the 'HR Administration' interface. On the left is a navigation menu with items: Job Information, Headcount, Labor Administration, Record Administrative Actions (highlighted in green), HR Notification, HR Configuration, Dotted Line, Export Org Chart, OnBoarding, and OffBoarding. The main content area is titled 'Record Administrative Actions' and includes a 'Find an Existing Value' button. Below this is a 'Search Criteria' section, outlined in red, which contains the following fields: Empl ID (begins with), First Name (begins with), Last Name (begins with), Payroll Status (=), Employee Classification (begins with), Employee Type (=), Business Unit (begins with, currently set to MA), Supervisor ID (begins with), and Job Title (begins with). A 'Case Sensitive' checkbox is located below the search criteria. At the bottom of the form are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Lesson 1: Discipline Management Continued

5. Scroll down, and then select an employee who violated a policy or regulation.

DPR Self-Service **Record Administrative Actions**

Employee Classification begins with

Employee Type =

Business Unit begins with LB

Supervisor ID begins with 00038584

Job Title begins with

Case Sensitive

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

Search Results

View All 1-10 of 10

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Job Title
00029546	Luz	Gutierrez	Active	AA	Hourly	Library As
00119754	Rommie	Brown III	Active	AE	Hourly	Library Pa
00184739	Norma	Salinas	Active	AA	Hourly	Library As

Lesson 1: Discipline Management Continued

6. Make sure to complete the mandatory and other relevant fields in the **Disciplinary Action** tab. In this example:

- **Type:** Search and select **Disciplinary Type** from the **Look Up** pop-up window.
- **Incident Date:** Select the month, day, and year from the calendar icon when the violation occurred.
- **Disciplinary Date:** Select the month, day, and year from the calendar icon when the disciplinary action will be imposed.
- **Violations:** Search and select **Violations** from the **Look Up** pop-up window.

Note: The description is auto-populated based on the selection.

- **Discipline Offenses:** Search and select **Disciplinary Offense** from the **Look Up** pop-up window.

Note: The description is auto-populated based on the selection.

The screenshot shows the 'Record Administrative Actions' form for Norma Salinas (Person ID 00184739). The 'Disciplinary Action' tab is active. The form includes fields for Incident Date (01/14/2022), Cost, Entered By (00038584), Supervisor ID (00038584), and Disciplinary Date (01/14/2022). The Disciplinary Action Report section is set to 'Confidential' and 'Active'. Below this are two tables: 'Violations' and 'Discipline Offenses', both showing one entry with a search field and expand/collapse icons.

Violations	Description
1	

Discipline Offense	Description
1	

Lesson 1: Discipline Management Continued

- **Facts:** Provide the Facts related to the Discipline Offense.
- **Administrative/Implementing Orders:** Search and select **Administrative Orders** from the **Look Up** pop-up window.

Note: The description is auto-populated based on the selection.

- **Departmental Standard Operational Procedures:** Search and select **Dept Standard Operation Proc** from the **Look Up** pop-up window.

Note: This is unique to every department and each department can select a violation as needed.

The screenshot displays a software interface with three main sections, each highlighted with a red border:

- Facts:** A large empty text input field.
- Administrative/Implementing Orders:** A search results table with columns for 'Administrative Orders' and 'Description'. The first row shows '7-36' in the first column and 'Workplace Violence' in the second. Navigation controls include a search icon, a dropdown for '1-1 of 1', and a 'View All' link.
- Departmental Standard Operational Procedures:** A search results table with columns for 'Dept Standard Operational Proc', 'Effective Date', and 'Description'. The first row has an empty search box in the first column. Navigation controls include a search icon, a dropdown for '1-1 of 1', and a 'View All' link.

Lesson 1: Discipline Management Continued

- **Miscellaneous Departmental Violations:** Search and select **Misc. Departmental Violations** from the **Look Up** pop-up window

Note: This is unique to every department and each department can select a violation as needed.

- Select the **Action Taken** hyperlink

Miscellaneous Departmental Violations

Miscellaneous Dept Violations	Description	View Description
1 EDR		View Description

Disciplinary Notes

Attachments

Attachments: GetMessageText: No default message. (25010,13)

Add Attachment

Print DAR Print Notes

Save Return to Search Previous in List Next in List Notify

Disciplinary Action | **Action Taken** | Disciplinary Resolution

Lesson 1: Discipline Management Continued

7. Make sure to complete the mandatory and other relevant fields in the **Action Taken** tab. In this example:

- **Disciplinary Step:** Type the **Disciplinary Step**, or search and select it from the **Look Up** pop-up window.
- **Action Date:** Type the date, or select the month, day, and year from the calendar icon when the disciplinary action is conducted.
- **Discussed With:** Type the **Empl ID** of the manager whom the employee discussed with regarding the disciplinary action, or search and select it from the **Look Up** pop-up window.

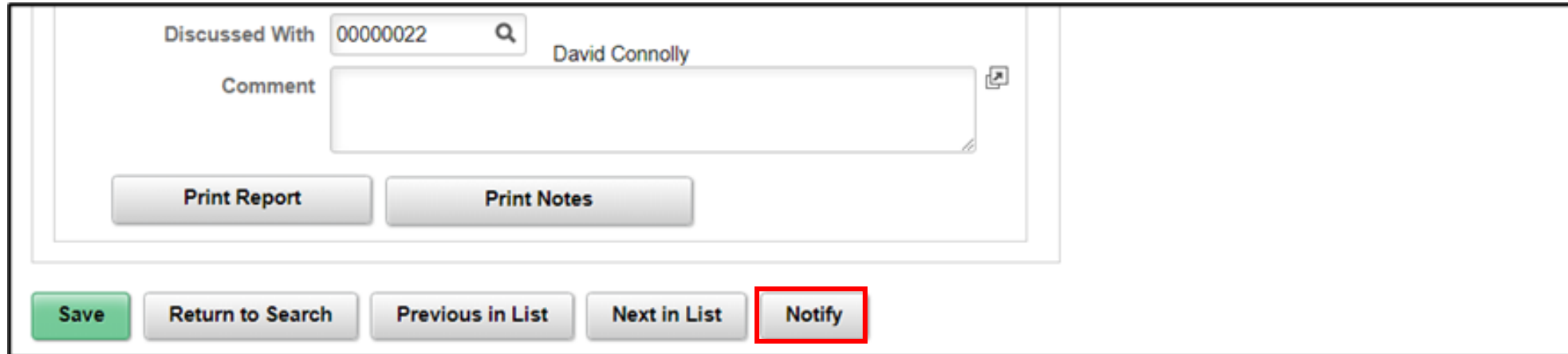
8. Select **Save** to create the disciplinary record.

Note: A DAR number is created, and a notification is sent to the DPR.

The screenshot displays the 'DPR Self-Service' interface for 'Record Administrative Actions'. The user is logged in as 'Norma Salinas' (Person ID: 00184739). The 'Action Taken' tab is selected, showing a disciplinary record for 'DAR' (Disciplinary Action Report) with an incident date of 01/14/2022. The 'Action Taken' section is highlighted with a red box and contains the following fields: 'Disciplinary Step' (PND, Pending), 'Action Date' (01/14/2022), 'Discussed With' (0000022, David Connolly), and a 'Comment' field. Below the 'Action Taken' section are 'Print Report' and 'Print Notes' buttons. At the bottom of the interface, there are navigation buttons: 'Save' (highlighted in green), 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The breadcrumb trail at the bottom reads: 'Disciplinary Action | Action Taken | Disciplinary Resolution'.

Lesson 1: Discipline Management Continued

9. If needed, select **Notify** to notify a specific recipient within a department.



The screenshot displays a web interface for discipline management. At the top, there is a search field labeled "Discussed With" containing the ID "00000022" and a magnifying glass icon. To the right of the search field, the name "David Connolly" is displayed. Below the search field is a large text area labeled "Comment". Underneath the comment area are two buttons: "Print Report" and "Print Notes". At the bottom of the interface, there is a row of five buttons: "Save" (highlighted in green), "Return to Search", "Previous in List", "Next in List", and "Notify" (highlighted with a red border).

Lesson 1: Discipline Management Continued

- To send Ad Hoc notifications, populate the **Notification Details** and then select **Ok** to return to the Action Taken tab.

Workflow Notification

[Help](#)

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

[Lookup Recipient](#)

Notification Details

To:

CC:

BCC:

Priority:

Subject: [✎](#)

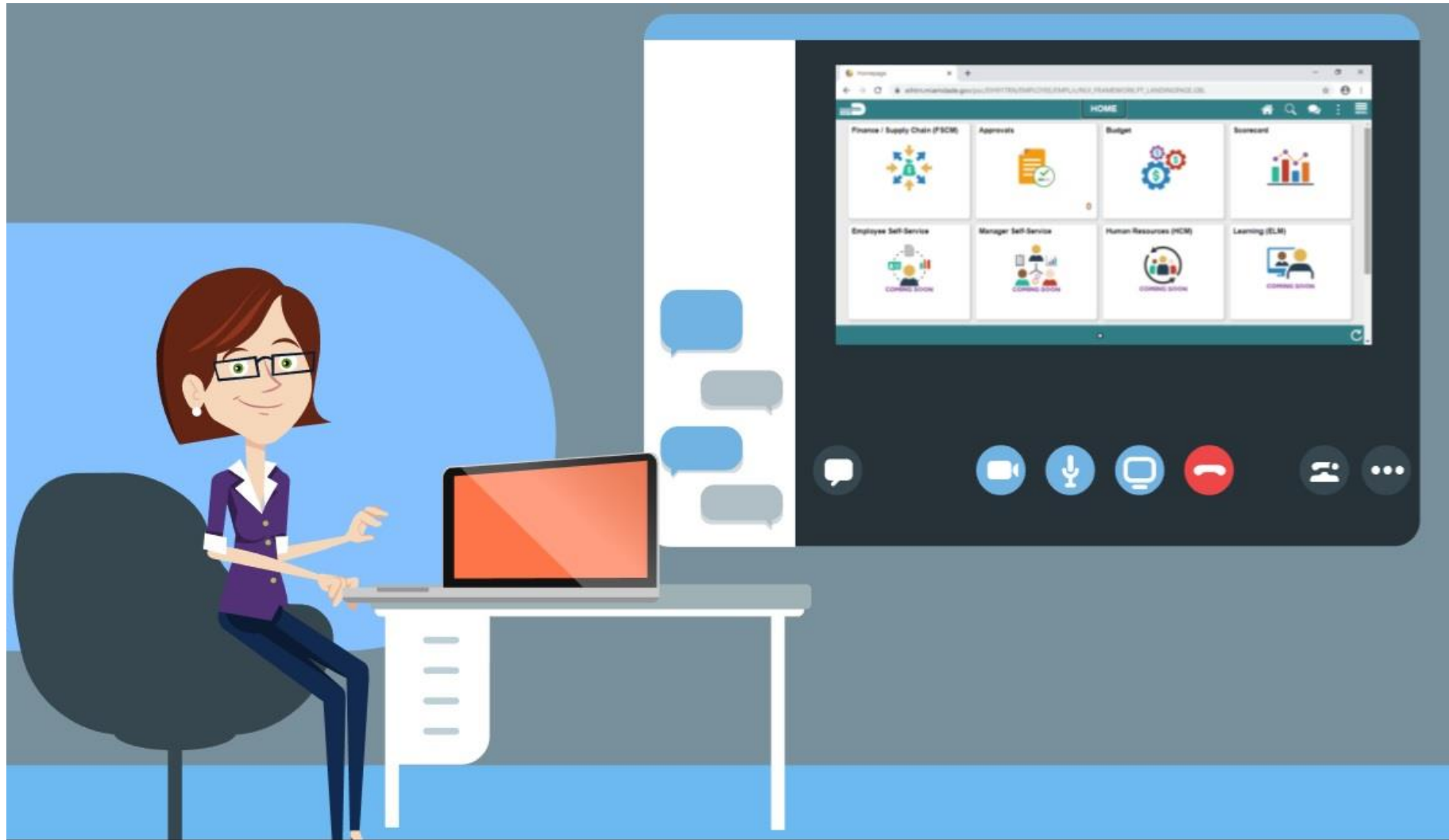
Template:
Priority: %NotificationPriority
Date Sent: 2022-01-14

Message: [✎](#)

[Delivery Options](#)
 RichText

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

Lesson 1: Activities and Exercises

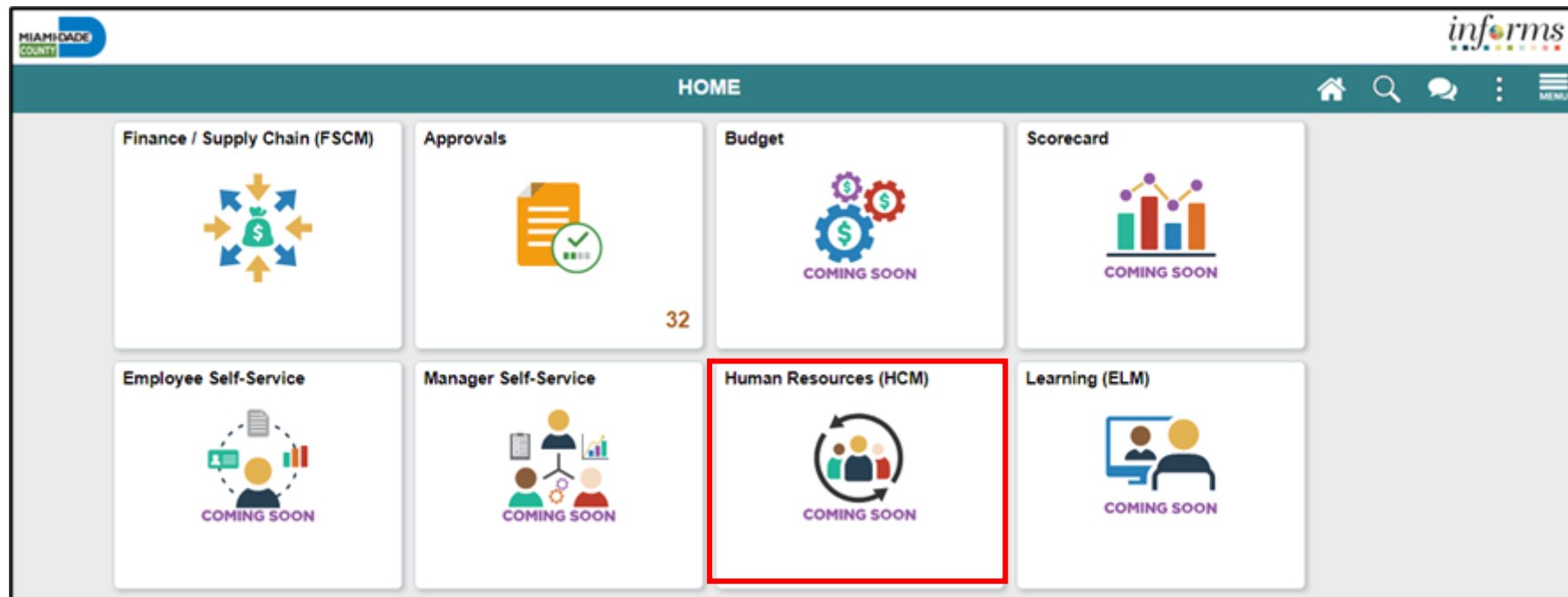


Lesson 1: Discipline Management Continued

Record a Disciplinary Resolution

As a DPR, create a disciplinary resolution in INFORMS.

1. Log into INFORMS and select **Human Resources (HCM)** from the home landing page below.



Lesson 1: Discipline Management Continued

2. Select **HR Administration**.



Lesson 1: Discipline Management Continued

3. Select **Labor Administration**.
4. Select **Record Administrative Actions**.
5. Populate the **Search Criteria** as needed, and then select **Search**.
6. Select an employee who violated a policy or regulation.

Human Resources (HCM) HR Administration

Record Administrative Actions

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

First Name begins with

Last Name begins with

Payroll Status =

Employee Classification begins with

Employee Type =

Business Unit begins with

Supervisor ID begins with

Job Title begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All 1-37 of 37

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Supervisor ID	Job Title
00001021	Jasmine	Pettaway	Active	AC	Excep Hrlly	00310532	Mayor Miam
00002279	Brianne	Low	Active	AC	Hourly	00208885	Sr Executi
00014374	Domenico	Loudermilk	Active	AC	Excep Hrlly	00314889	Mayor'S Ai
00014743	Shepard	Rozier	Active	AC	Excep Hrlly	00025441	Assistant

Lesson 1: Discipline Management Continued

7. Select the **Disciplinary Resolution** tab.
8. Make sure to provide the mandatory and other relevant fields in the **Action Taken** tab. In this example:
 - **Recommended Action:** Search and select **Resolution Type** from the **Look Up** pop-up window.
 - **Suspension Begin Date:** Type the date, or select the month, day, and year from the calendar icon when the suspension starts.
 - **Suspension End Date:** Type the date, or select the month, day, and year from the calendar icon when the suspension ends.
 - **Standardized Countywide Settlement Agreements and Letters:** Search and select **Agreement** from the **Look Up** pop-up window.
 - **Departmental Agreements:** Search and select **Departmental Agreements** from the **Look Up** pop-up window.
 - **Departmental Letters:** Search and select **Departmental Letters** from the **Look Up** pop-up window.

The screenshot displays the HR Administration interface for a disciplinary resolution. The left sidebar shows navigation options like Job Information, Headcount, and Labor Administration. The main content area is titled 'Disciplinary Resolution' and includes fields for Reported Date (03/25/2022), Disciplinary Type (DAR), and Disciplinary Action Report (DAR Number 3). It also features input fields for Recommended Action, Final Action, Final Action Date, Suspension Begin Date, Suspension End Date, Date Received, and Deadline Date. There are checkboxes for Promotion Waived, Transfer Section, and Next Eligibility Date. Below these fields are three tables: Standardized Countywide Settlement Agreements and Letters, Departmental Agreements, and Departmental Letters, each with a search bar and a table with columns for Agreements, Departmental Agreements, and Departmental Letters, and a Description column.

Lesson 1: Discipline Management Continued

9. Scroll down, and then select **Save**.

Departmental Letters

1-1 of 1 | View All

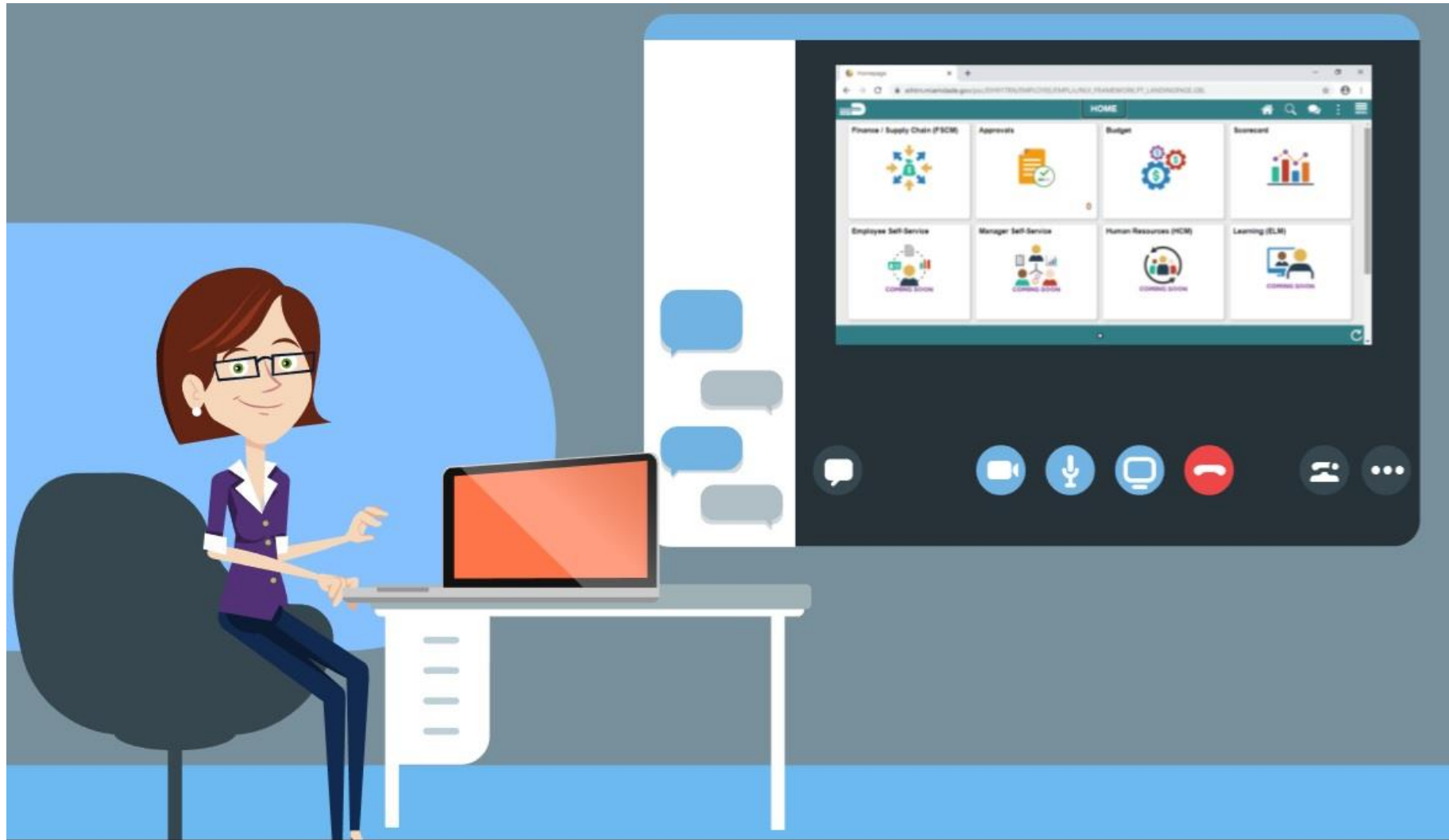
	Departmental Letter	Description		
1	<input type="text"/>		+	-

Resolution Comments

254 characters remaining

[Disciplinary Action](#) | [Action Taken](#) | [Disciplinary Resolution](#) | [MD Appeals](#)

Lesson 1: Activities and Exercises



Lesson 1: Lesson Summary

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

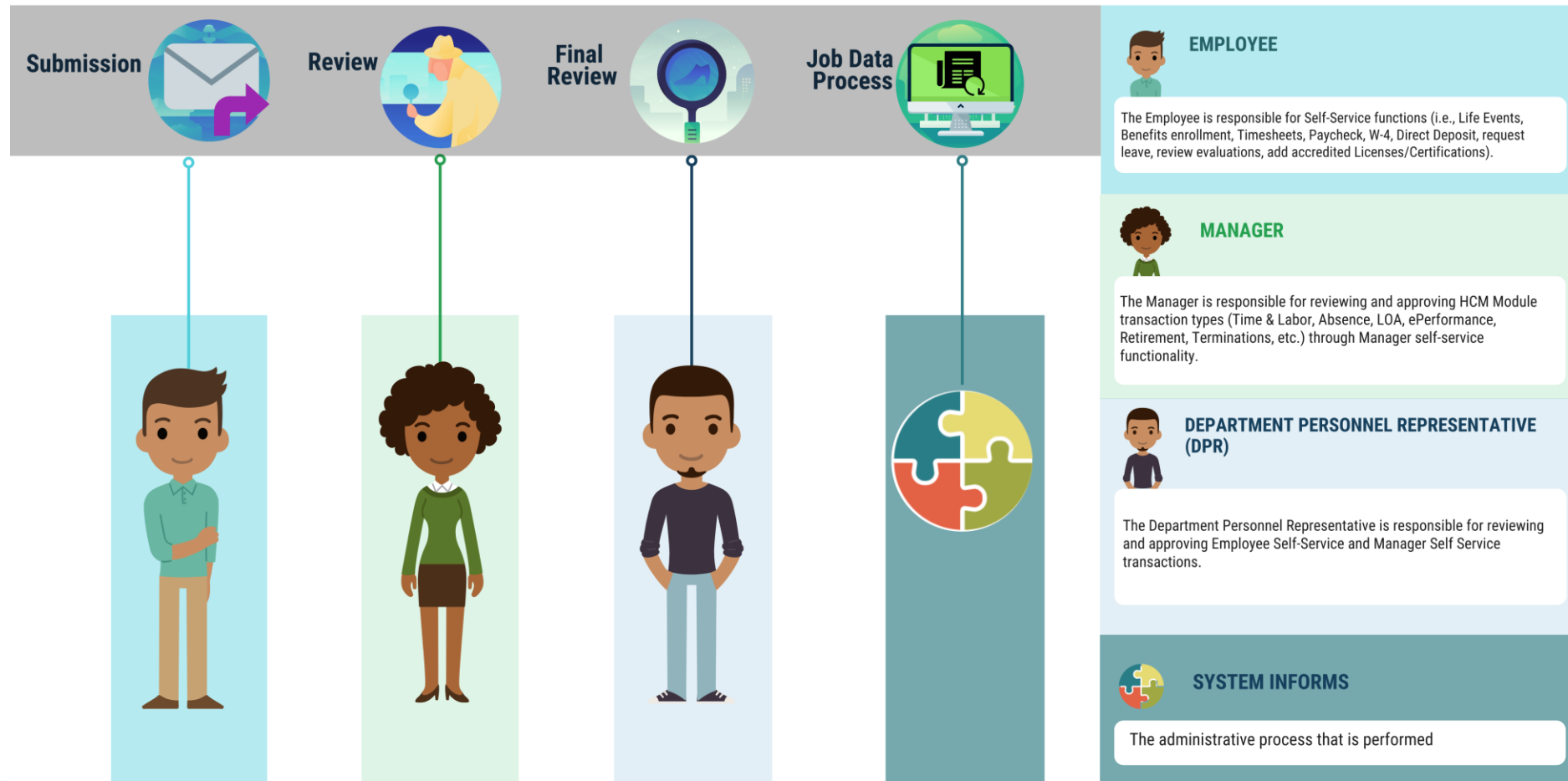
- Record employee Disciplinary Action and Action Taken Records
- Record employee Disciplinary Resolution Records

Lesson 2: Retirement and Voluntary Separation

- Approve an employee's retirement request
- Approve an employee's resignation request

Lesson 2: Retirement and Voluntary Separation Continued

RETIREMENT AND VOLUNTARY SEPARATION BUSINESS PROCESS



Lesson 2: Key Terms

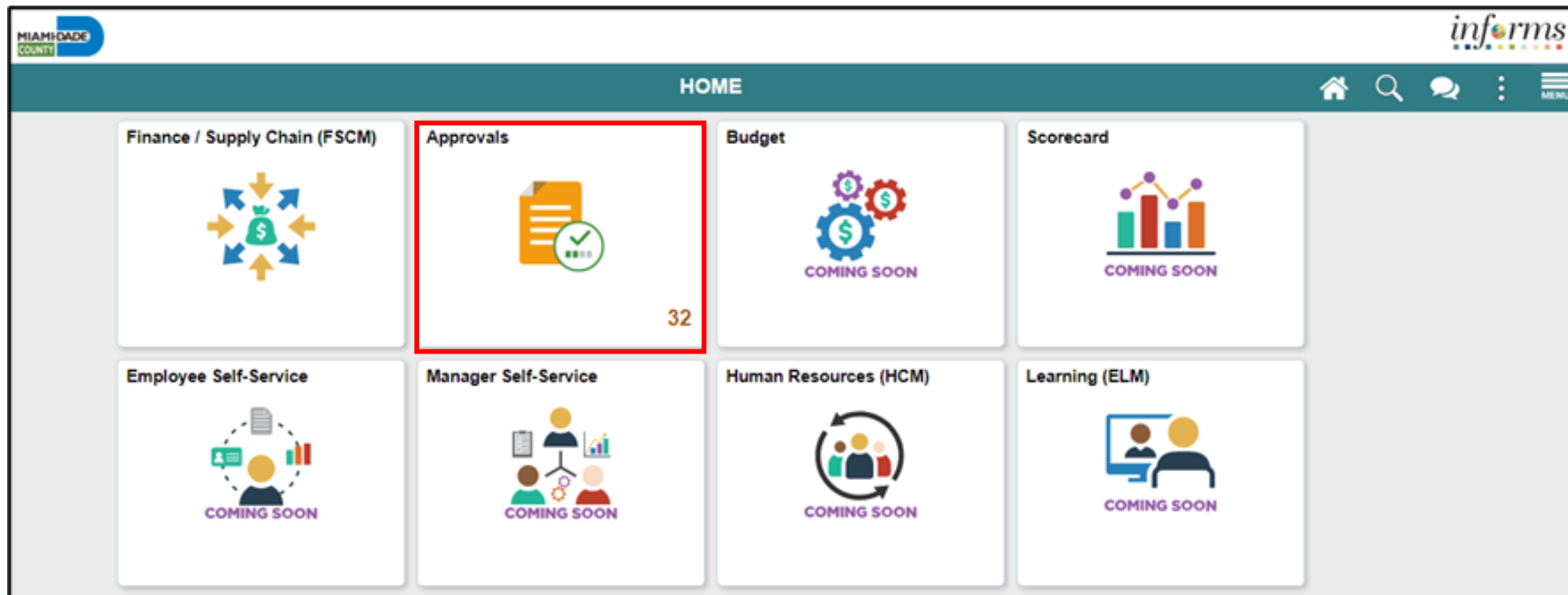
Term	Definition
Retirement	The employee's decision to permanently leave the County.
Voluntary Separation	The employee's decision to resign from the County.

Lesson 2: Retirement and Voluntary Separation Continued

Approve Employee Retirement

As a DPR, approve the employee's retirement record in INFORMS.

1. Login to INFORMS, and then select **Approvals**.



Lesson 2: Retirement and Voluntary Separation Continued

2. Select Retire Employee.

The screenshot shows a 'Pending Approvals' dashboard. On the left, a sidebar lists various approval types with their counts. The 'Retire Employee' item is highlighted with a red box. The main content area shows a list of pending approvals, all of which are 'Payable Time' requests for APaul AVillaverde. Each entry shows a quantity of 0 hours and a status of 'Routed' with a date of 09/03/2020.

View By	Type	Count
All		270
Address Change		3
Create Position		12
DPR Salary Change		92
Forms		46
Job Opening		1
Manage Position		9
Payable Time		100
Reported Time		1
Request Leave of Absence		2
Retire Employee		2
Terminate Employee		2

Payable Time	Quantity for Approval	Status	Date
APaul AVillaverde	Quantity for Approval -16 Hours 03/09/2020 - 03/16/2020	Routed	08/04/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020
	Quantity for Approval 0 Hours	Routed	09/03/2020

Lesson 2: Retirement and Voluntary Separation Continued

3. Select an employee to retire from the **Retire Employee** page.

The screenshot shows the 'Pending Approvals' section of the 'DPR Self Service' application. On the left is a navigation menu with categories like 'All' (271), 'Address Change' (3), 'Create Position' (12), 'DPR Salary Change' (91), and 'Forms' (46). The main area displays a list of pending approvals under the heading 'Retire Employee'. Two rows are visible, both with the reason 'Reason - Retirement'. The first row, for Dwight Wilson Jr, is highlighted with a red border and shows a status of 'Routed' on 03/16/2021. The second row, for Esther Reyes, shows a status of 'Routed' on 09/21/2021. A '2 rows' indicator is present in the top right of the list area.

Retire Employee		2 rows
Retire Employee Dwight Wilson Jr	Reason - Retirement	Routed 03/16/2021
Retire Employee Esther Reyes	Reason - Retirement	Routed 09/21/2021

Lesson 2: Retirement and Voluntary Separation Continued

4. Provide the **Approver Comments**, and then select **Approve**.

Pending Approvals Retire Employee

Dwight Wilson Jr
Hr Services Clerk

Approve **Deny**

Summary

Transaction Date 03/16/21 Reason Retirement
Requester Tommy Salleh

Unchanged Job Information

Position Number HR SERVICES CLERK - 00003229
Job Title Hr Services Clerk - 000451
Reports To Manager MARINA MANAGER 3 - 00011594

Requester Comments

None

Approver Comments

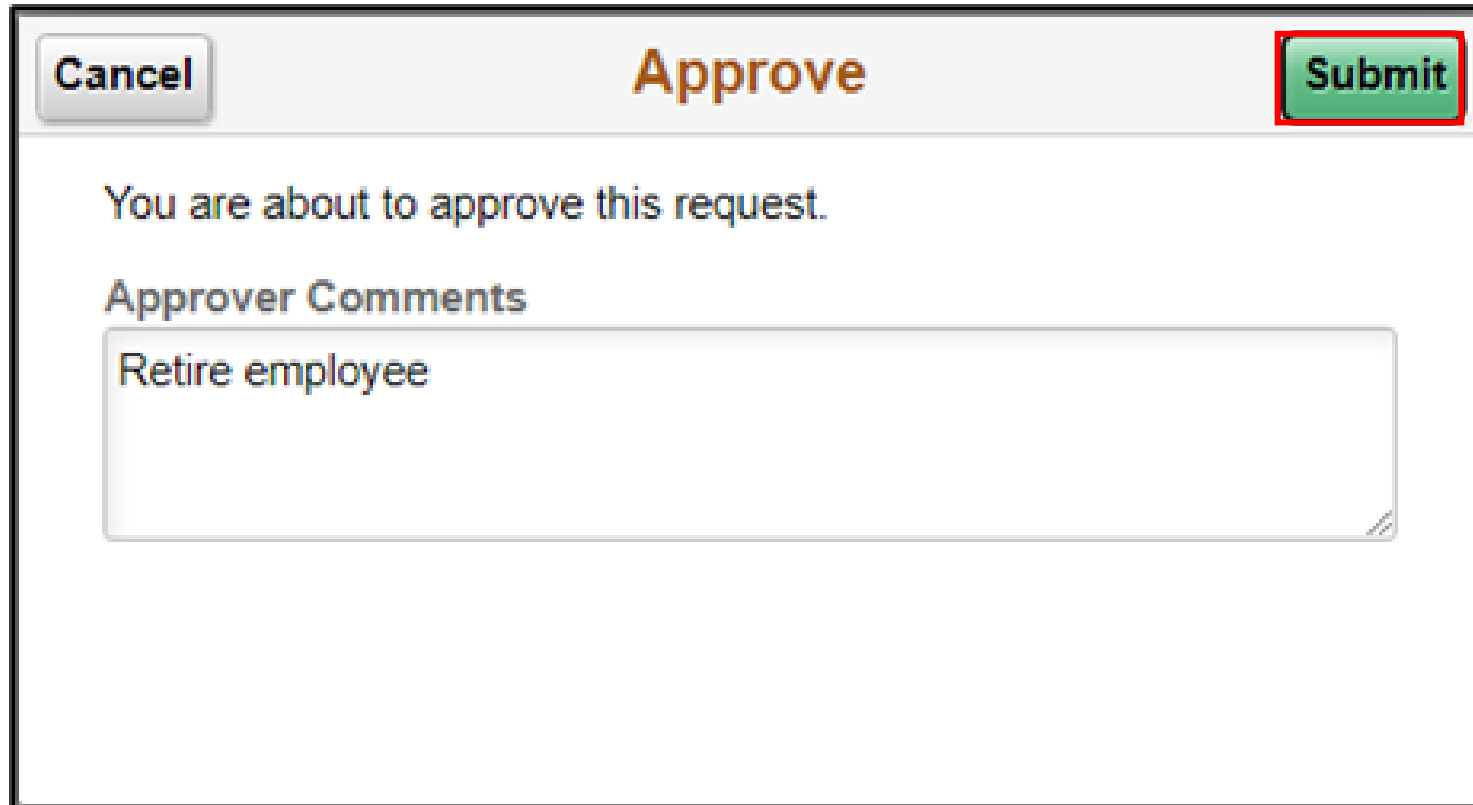
Retire employee

Approval Chain >

Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

Note: Approver Comments can be changed as needed.



The screenshot shows a modal dialog box with a light gray header. On the left is a 'Cancel' button, in the center is the word 'Approve' in orange, and on the right is a green 'Submit' button with a red border. Below the header, the text 'You are about to approve this request.' is displayed. Underneath is a section titled 'Approver Comments' with a text input field containing the text 'Retire employee'.

Lesson 2: Retirement and Voluntary Separation Continued

Approve Employee Voluntary Separation

As a DPR, approve the employee's resignation record in INFORMS.

1. Login to INFORMS, and then select **Approvals**.

The screenshot displays the INFORMS system home page. The top navigation bar features the Miami-Dade County logo on the left, the word "HOME" in the center, and icons for home, search, chat, and menu on the right. The main content area is a grid of tiles. The "Approvals" tile is highlighted with a red border and shows a count of 32. Other tiles include "Finance / Supply Chain (FSCM)", "Budget", "Scorecard", "Employee Self-Service", "Manager Self-Service", "Human Resources (HCM)", and "Learning (ELM)". The "Budget", "Scorecard", "Employee Self-Service", "Human Resources (HCM)", and "Learning (ELM)" tiles all indicate "COMING SOON".

Lesson 2: Retirement and Voluntary Separation Continued

2. Select Terminate Employee.

The screenshot displays a mobile application interface for 'Pending Approvals'. On the left, a sidebar lists various transaction types with their counts. The 'Terminate Employee' option, which has a count of 2, is highlighted with a red box. The main area shows a list of pending approvals, all of which are 'Payable Time' requests for approval, with a quantity of 0 hours and a status of 'Routed'. The first entry is for APaul AVillaverde, with a quantity of -16 hours and a routing date of 08/04/2020. Other entries have routing dates of 09/03/2020. A note at the bottom of the sidebar states 'Some transactions are not displayed.'

Transaction Type	Count
All	270
Address Change	3
Create Position	12
DPR Salary Change	92
Forms	46
Job Opening	1
Manage Position	9
Payable Time	100
Reported Time	1
Request Leave of Absence	2
Retire Employee	2
Terminate Employee	2

Payable Time	Quantity for Approval	Status	Date
APaul AVillaverde	-16 Hours	Routed	08/04/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020
	0 Hours	Routed	09/03/2020

Lesson 2: Retirement and Voluntary Separation Continued

3. Select an employee to resign from the **Terminate Employee** page.

The screenshot shows the 'Pending Approvals' page in the 'DPR Self Service' system. The page has a teal header with the 'MIAMI DADE COUNTY' logo on the left and the 'informs' logo on the right. Below the header, there is a navigation bar with 'DPR Self Service' and 'Pending Approvals'. A sidebar on the left lists various approval types: 'All' (270), 'Address Change' (3), 'Create Position' (12), and 'DPR Salary Change' (91). The main content area displays a table of pending approvals. The table has two rows. The first row is for 'Ricardo Diaz' with the reason 'End of Assignment' and a status of 'Routed' dated '10/30/2020'. The second row is for 'Happy Halleburton' with the reason 'Voluntary Resignation' and a status of 'Routed' dated '03/17/2021'. This second row is highlighted with a red border. The table also indicates '2 rows' and 'Attachments 1' for the highlighted row.

View By	Type			
All	270	Terminate Employee	Reason - End of Assignment	Routed 10/30/2020
Address Change	3	Terminate Employee Ricardo Diaz		
Create Position	12	Terminate Employee Happy Halleburton	Reason - Voluntary Resignation Attachments 1	Routed 03/17/2021
DPR Salary Change	91			

Lesson 2: Retirement and Voluntary Separation Continued

4. Provide the **Approver Comments**, and then select **Approve**.

Pending Approvals Terminate Employee

Happy Halleburton
Office Support Specialist 1

Approve **Deny**

Summary

Transaction Date 01/29/21 Reason Voluntary Resignation
Requester Ernie Els

Unchanged Job Information

Position Number Office Support Specialist 1 - HHT00007
Job Title Office Support Specialist 1 - 000020
Reports To Manager Human Resources Manager - E0000001

Attachments

Attachments >

Requester Comments

test

Approver Comments

Voluntary resignation

Approval Chain >

Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

Note: Approver Comments can be changed as needed.



The screenshot shows a dialog box with a light gray header. On the left is a 'Cancel' button, in the center is the word 'Approve' in orange, and on the right is a green 'Submit' button with a red border. Below the header, the text reads 'You are about to approve this request.' Underneath is the label 'Approver Comments' followed by a text input field containing the text 'Voluntary resignation'.

Lesson 2: Lesson Summary

Now that you have completed the Retirement and Voluntary Separation lesson, you should be able to:

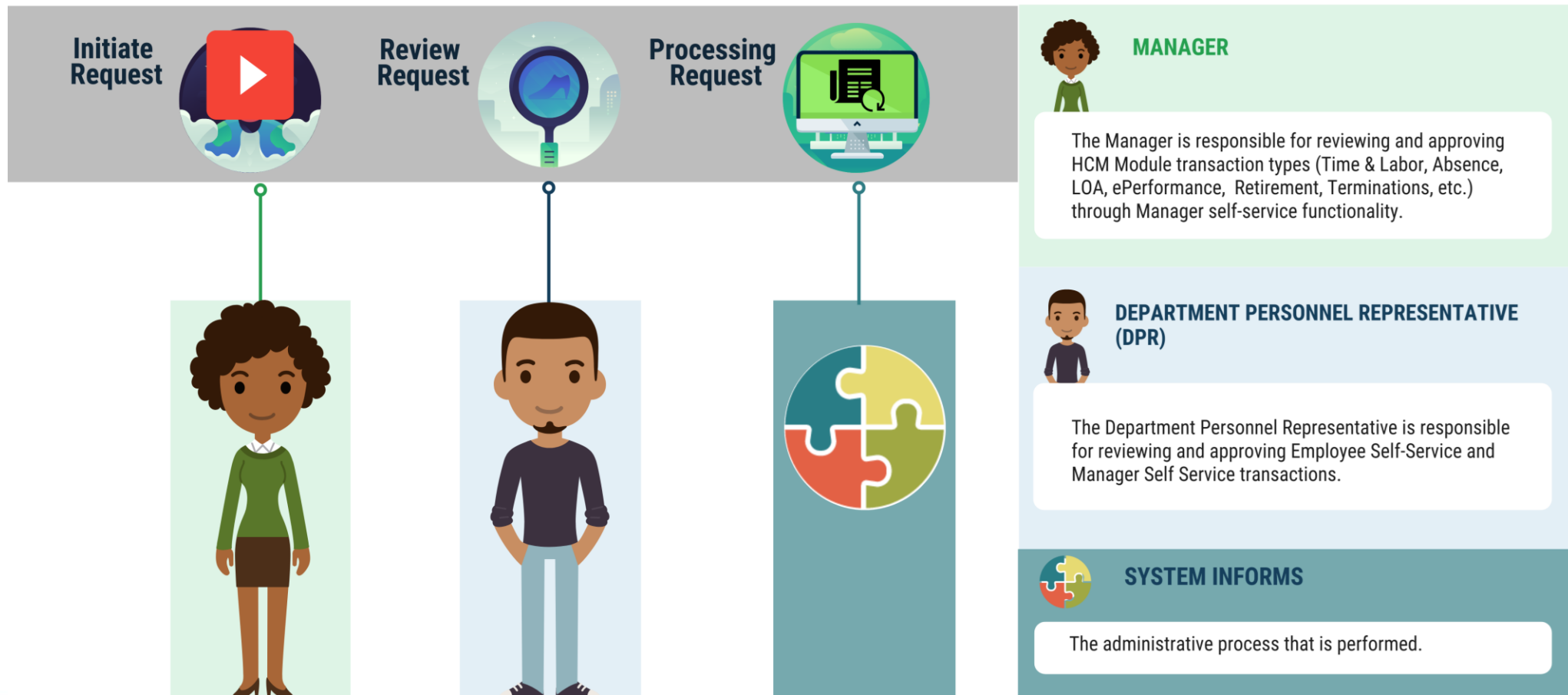
- Approve an employee's retirement request
- Approve an employee's resignation request

Lesson 3: Involuntary Separation Approvals

- Approve an employee's involuntary separation

Lesson 3: Involuntary Separation Approvals Continued

INVOLUNTARY SEPARATION APPROVALS BUSINESS PROCESS



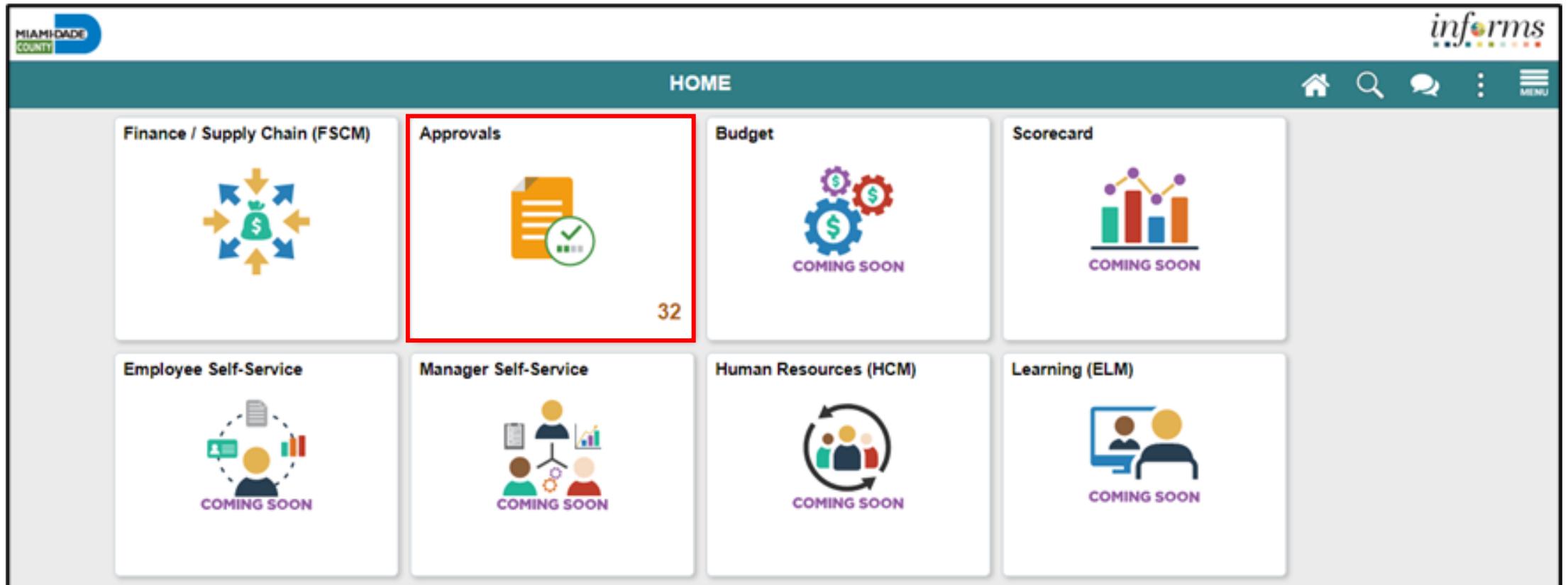
Lesson 3: Key Terms

Term	Definition
Involuntary separation	The County's decision to terminate the employee due to County violations / offenses.

Lesson 3: Involuntary Separation Approvals Continued

As a DPR, approve the employee's involuntary separation record in INFORMS.

1. Login to INFORMS, and then select **Approvals**.



Lesson 3: Involuntary Separation Approvals Continued

2. Select Terminate Employee.

The screenshot shows a mobile application interface for 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below it is a list of transaction types with counts in blue circles. The 'Terminate Employee' item is highlighted with a red border and has a count of 2. The main content area shows a list of approvals under the heading 'All' (270 rows). The first approval is for 'APaul AVillaverde' with a 'Payable Time' of '03/09/2020 - 03/16/2020' and a 'Quantity for Approval' of '-16 Hours'. It is 'Routed' and dated '08/04/2020'. Subsequent entries are for 'Payable Time' with 'Quantity for Approval' of '0 Hours' and 'Routed' status, with dates of '09/03/2020'. A note at the bottom left states 'Some transactions are not displayed.'

Transaction Type	Count
All	270
Address Change	3
Create Position	12
DPR Salary Change	92
Forms	46
Job Opening	1
Manage Position	9
Payable Time	100
Reported Time	1
Request Leave of Absence	2
Retire Employee	2
Terminate Employee	2

Payable Time	Quantity for Approval	Status	Date
APaul AVillaverde 03/09/2020 - 03/16/2020	-16 Hours	Routed	08/04/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020
Payable Time	0 Hours	Routed	09/03/2020

Lesson 3: Involuntary Separation Approvals Continued

3. Select an employee to involuntarily terminate from the **Terminate Employee** page.

The screenshot shows the 'Pending Approvals' page in the DPR Self Service system. The page has a teal header with the Miami-Dade County logo on the left and the 'informs' logo on the right. Below the header, there is a navigation bar with 'DPR Self Service' and 'Pending Approvals'. A 'View By' dropdown menu is set to 'Type'. On the left, there is a sidebar with a list of approval types and their counts: All (271), Address Change (3), Create Position (12), DPR Salary Change (92), and Forms (46). The main content area shows a list of pending approvals under the heading 'Terminate Employee'. The list has 3 rows. The first row is for Ricardo Diaz, with the reason 'End of Assignment', routed on 10/30/2020. The second row is for Happy Halleburton, with the reason 'Voluntary Resignation' and 1 attachment, routed on 03/17/2021. The third row, which is highlighted with a red border, is for Luis Zamuria, with the reason 'Involuntary Separation', routed on 01/17/2022.

Terminate Employee		3 rows
Terminate Employee Ricardo Diaz	Reason - End of Assignment	Routed 10/30/2020 >
Terminate Employee Happy Halleburton	Reason - Voluntary Resignation Attachments 1	Routed 03/17/2021 >
Terminate Employee Luis Zamuria	Reason - Involuntary Separation	Routed 01/17/2022 >

Lesson 3: Involuntary Separation Approvals Continued

4. Provide the **Approver Comments**, and then select **Approve**.

Pending Approvals Terminate Employee

Luis Zamuria
Hris Specialist **Approve** **Deny**

Summary

Transaction Date 01/17/22 Reason Involuntary Separation
Requester Dena Kelly

Unchanged Job Information

Position Number HRIS SPECIALIST - 00009388
Job Title Hris Specialist - 000461
Reports To Manager MGR MDPD HUMAN RESOURCES SECT - 00009411

Requester Comments

None

Approver Comments

Involuntarily terminated

Approval Chain >

Lesson 3: Involuntary Separation Approvals Continued

5. Select **Submit**.

Note: Approver Comments can be changed as needed.



The screenshot shows a dialog box with a light gray header. On the left is a 'Cancel' button, in the center is the word 'Approve' in orange, and on the right is a green 'Submit' button with a red border. Below the header, the text 'You are about to approve this request.' is displayed. Underneath is the label 'Approver Comments' followed by a text input field containing the text 'Involuntarily terminated'.

Lesson 3: Involuntary Separation Approvals Continued

Note: The history of the employee is captured on each page in Job Data.

The screenshot displays the HR Administration interface for an employee named Jimmy Torres (Empl ID: 00000172). The 'Job Data' section is active, showing 'Work Location Details' for a 'MAINTENANCE TECHNICIAN' position. The interface includes a navigation menu on the left with categories like Job Information, Headcount, Labor Administration, and HR Configuration. The main content area shows various fields for job details, including dates, sequences, and organizational structure. A red box highlights the '1 of 4' page indicator in the top right of the 'Work Location Details' section. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

Field	Value
*Effective Date	03/29/2022
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Position Number	00010947
Position Entry Date	03/02/1992
Regulatory Region	USA
Company	MDC
Business Unit	PR
Department	PR27010000
Department Entry Date	03/02/1992
Location	D5D3030000
Establishment ID	MDC
Last Start Date	03/02/1992
Expected Job End Date	

Lesson 3: Lesson Summary

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

- Approve an employee's involuntary separation

Module 3: Course Summary

Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

Course Content Summary

Congratulations on completing the Update Team Information course.

You now understand:

- Discipline Management
- Retirement and Voluntary Separation Approvals
- Involuntary Separation Approvals

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

- Discipline Management (Record Disciplinary Action and Disciplinary Action Taken)
- Discipline Management (Record Disciplinary Resolution)
- Retirement and Voluntary Separation (Approve Employee Retirement)
- Retirement and Voluntary Separation (Approve Employee Voluntary Separation)
- Involuntary Separation Approvals

For additional information, be sure to visit:

- www.miamidade.gov/informs



CONGRATULATIONS

Congratulations on successfully completing the Update Team Information course!

DPR 304 – Departmental HR - Updating Team Information