

Course ID: ESS 201

Course: Employee Self Service - eProfile, ePay,
ePerformance

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 eProfile, ePay and ePerformance processes.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: eProfile, ePay and ePerformance
 - Employee Self-Service Personal Profile Updates
 - Profile Management
 - Submit Resignation or Retirement Request
 - Employee Self-Service Payroll Data Updates
 - Review Paychecks and W4
 - Employee self-evaluation (Optional)
 - Participant performance review
- Module 3: Course Summary

Course Overview, Continued

Training Audiences	<ul style="list-style-type: none">• Employee
Prerequisites	<ul style="list-style-type: none">• ERP 101 – Overview of INFORMS• ERP 102 – INFORMS Navigation, Reporting, and Online Help
Other Related Courses	<ul style="list-style-type: none">• ESS 202 – Employee Self Service – eBenefits• ESS 203 –Employee Self Service - Time Management
Estimated Duration	<ul style="list-style-type: none">• Day 1 (6 Hours)• Day 2 (6 Hours)• Total Duration: 12 Hours

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

Course Administration and Logistics



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



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



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

Learning Objectives

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

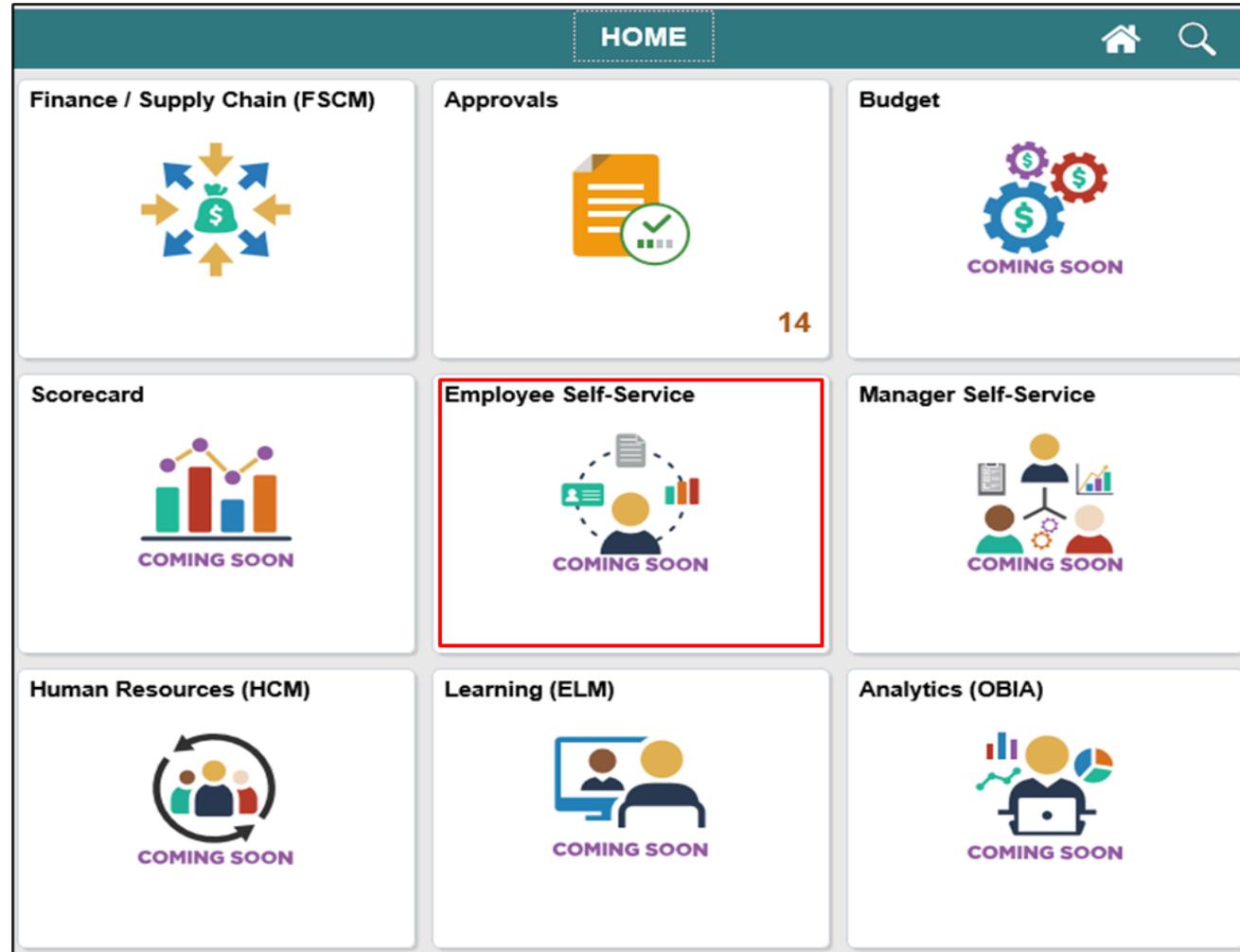
- Perform Personal Profile Updates
- Submit Profile Management Requests
- Submit a Resignation or Retirement Request
- Perform Payroll Data Updates
- Review Paychecks and W4
- Complete an Employee self-evaluation (optional)
- Complete a Performance Evaluation

Roles and Responsibilities

Role	Responsibilities
Employee	The Employee is responsible for Self-Service functions (i.e. Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications) and is empowered to view and update personal information.

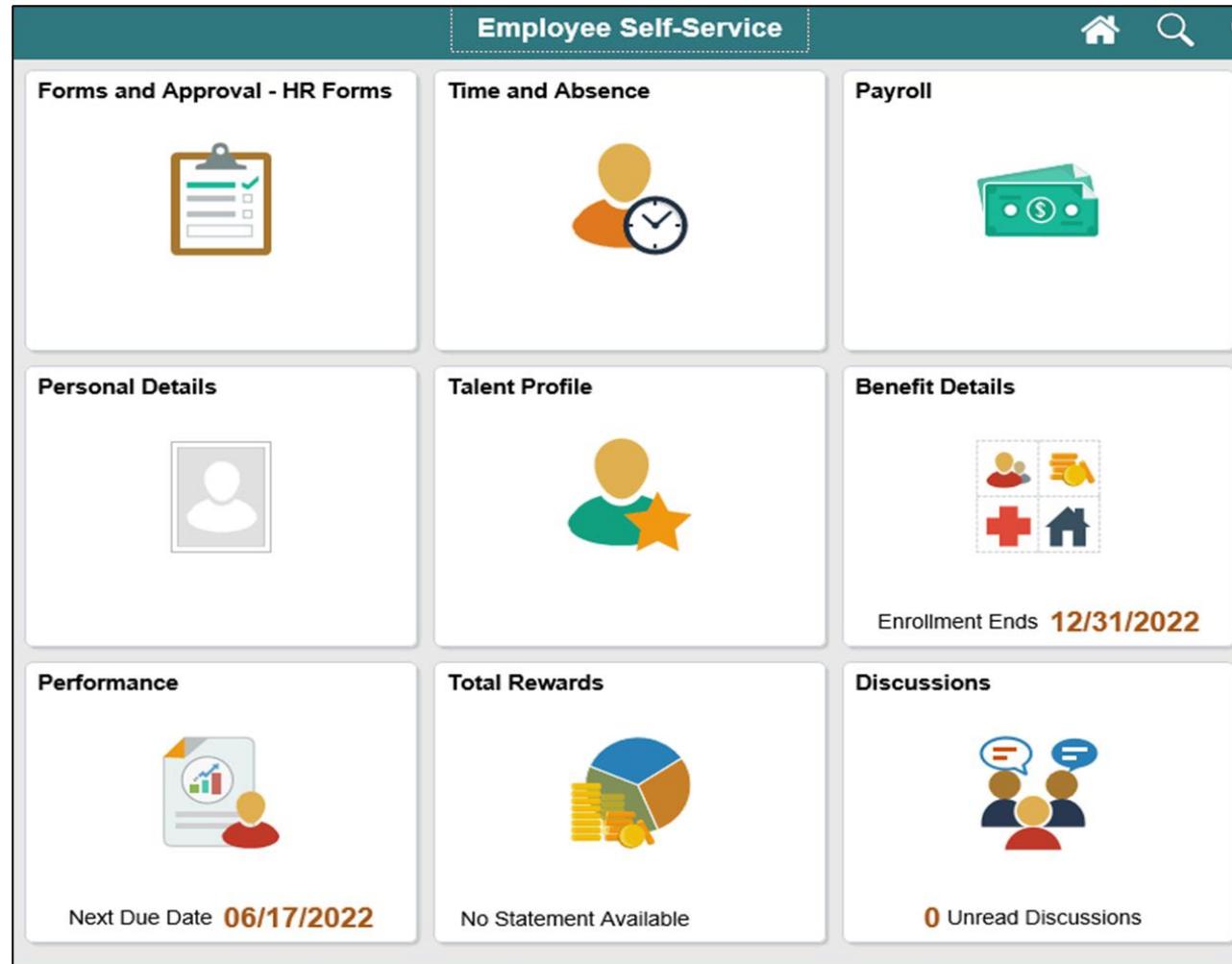
Navigation

Login to INFORMS and select the Employee Self-Service tile from the HOME landing page.



Navigation (continued)

There are multiple navigation routes within Employee Self-Service. These will be detailed in each Lesson.



Purpose and Benefits to Business Process

- Automation of County workforce performance evaluation business process
- Data persistence – old INFORMS data is never deleted, only past effective-dated and inactivated (superseded)
- Decreased data redundancy – Execute all performance evaluation administration activities in a single common system (INFORMS) - eliminating manual data re-keying, reducing data entry errors and improving data quality
- Employee empowerment - employee self-service and manager self-service interfaces are intuitive, easy to use and available on demand on multiple devices and platforms
- Enhanced/rapid pro forma and ad-hoc report development and deployment capabilities
- Ensure dynamic compliance with Human Resources business logic and consistent/identical business processes, Payroll salary grade table, Administrative Orders, Personnel Rules and ratified Collective Bargaining Agreements

Purpose and Benefits to Business Process, Continued

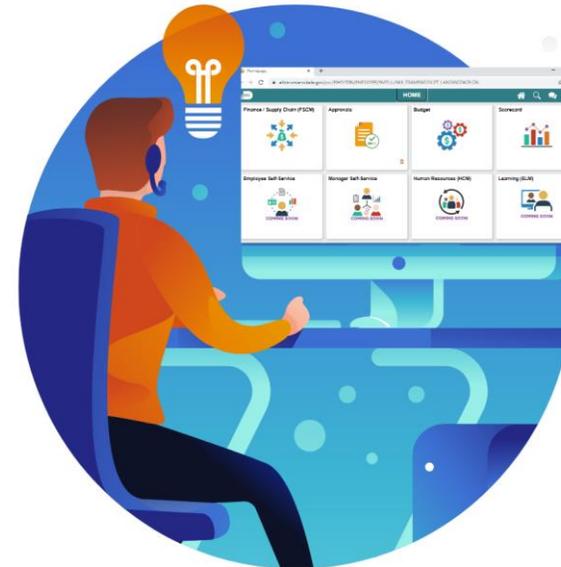
- Improve workforce efficiency via collaborative processing – reviewers and approvers
- Logical separation of duties - Department Personnel Representatives (DPR) role ensures Central HR control and consistency from a dedicated Departmental context and perspective
- Robust technical platform – high on-demand availability with minimum downtime, scalable, rapid deployment of system upgrades, continuous improvement, iterative development, data security
- Streamlined operations - Automated email notifications, approval routing, consistent business process between Departments, electronic signatures, reduced processing time with online transaction processing, rapid data retrieval via ad hoc query capability, seamless integration between County systems
- Workforce resource processing effort smoothing – Performance reviews business process is driven by anniversary dates and collective bargaining agreement ratification dates, not by arbitrary calendar dates or all at the same time

Introduction to Activities and Exercises

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



Training
Activities



Training
Exercises

Module 1: Course Introduction Summary

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

Module 2: eProfile, ePay and ePerformance

Module Topics

Module Introduction

Lesson 1: Employee Self-Service Personal Profile Updates

Lesson 2: Profile Management

Lesson 3: Submit Termination or Retirement Request

Lesson 4: Employee Self-Service Payroll Data Updates

Lesson 5: Review Paychecks and W4

Lesson 6: Employee self-evaluation (Optional)

Lesson 7: Participant performance review

Lesson 8: Reports and Queries

Lesson 1: Employee Self-Service Personal Profile Updates

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

- Request An Address Change
- Review, Edit and Update Contact Details
- Review and Edit Ethnic Groups
- Review and Edit Emergency Contacts
- Update Disability
- Review and Update Veteran Status

Lesson 1: Key Terms

Term	Definition
Preferred	A checkbox that identifies which option in a list is the Employee's personal preference.

Lesson 1: Personal Profile Updates, Continued

PERSON PROFILE UPDATES BUSINESS PROCESS

Submit Person Profile Update



Employee

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

Lesson 1: Personal Profile Updates, Continued

Employees review, edit and update the following Personal Profile information.

- Address
- Contact Details
- Ethnic Groups
- Emergency Contacts
- Disability
- Veteran Status

Lesson 1: Personal Profile Updates, Continued

Review/Update Address

Employees may review and/or update their address in INFORMS:

- Employees may have a Home Address and Mailing Address
- Address Changes may be present dated or future dated
- Address Changes can not be past dated

INFORMS empowers employees to specify where their mail is delivered.

Navigation – Review/Update Address

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Address

The screenshot displays the 'Personal Details' mobile application interface. At the top, there is a teal header with the text 'Personal Details' and navigation icons for home, search, and menu. Below the header, the 'Addresses' section is visible, with a sub-section for 'Home Address'. A single address entry is shown: '1st Avenue', 'APT 001', 'Miami, FL 33132', with a 'Current' status and a right-pointing arrow. Below this, the 'Mailing' section is shown with the text 'No data exists.' and a button labeled 'Add Mailing Address' which is highlighted with a red rectangular border.

Address	Status
1st Avenue APT 001 Miami, FL 33132	Current

Mailing

No data exists.

[Add Mailing Address](#)

Lesson 1: Personal Profile Updates, Continued

Review, Edit and Update Contact Details

Employees maintain the following Contact Details in INFORMS:

- Telephone Numbers (Business and Personal)
- Email Addresses (Business and Personal)
- One Telephone Number must be designated as "Preferred"
- One Email Address must be designated as "Preferred"

INFORMS empowers Employees to specify their contact preferences.

Navigation – Review/Update Contact Details

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Contact Details

Contact Details

Phone

Number	Extension	Type	Preferred	
305/765-4321		Mobile	✓	>

Email

Email Address	Type	Preferred	
DeeDee@yahoo.com	Other	✓	>

Instant Message

No data exists.

Lesson 1: Personal Profile Updates, Continued

Review and Edit Ethnic Groups

Employees have the option to voluntarily self-identify Ethnicity.

- May specify Hispanic/Latino heritage
- May choose to identify Race
- May choose to identify with one, multiple or no designations

The County must capture voluntarily reported ethnic demographic data in compliance with federal government requirements.

Navigation – Review and Edit Ethnic Groups

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Ethnic Groups

Personal Details



Ethnic Groups

1) Are you Hispanic or Latino? [Explain](#)

Yes
 No

2) What is your race? Select one or more. [Explain](#)

American Indian or Alaska Native
 Asian
 Black or African American
 Native Hawaiian or Pacific Islander
 White

Voluntary Self-Identification

The employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. In order to comply with these laws, the employer invites employees to voluntarily self-identify their race or ethnicity. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential and may only be used in accordance with the provisions of applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for civil rights enforcement. When reported, data will not identify any specific individual.

Lesson 1: Personal Profile Updates, Continued

Review and Edit Emergency Contacts

Employees may add, change or remove Emergency Contacts and their contact detail information.

- May choose to specify one, multiple or no Emergency Contacts
- May specify multiple contact methods for each Emergency Contact
- Must specify one Emergency Contact as "preferred"

If only one Emergency Contact is listed, INFORMS designates them as "preferred" by default.

Navigation – Review/Edit Emergency Contacts

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Emergency Contacts

Personal Details  

Emergency Contacts



Contact Name	Relationship	Preferred	
Bruce Michael	Friend	<input checked="" type="checkbox"/>	

Lesson 1: Personal Profile Updates, Continued

Update Disability

Employees have the option to voluntarily self-identify disability.

- Disability Status is always blank when opened
- Employees may indicate whether or not they have a disability
- The Employee may choose whether or not they wish to respond

The County makes reasonable accommodation for disabilities as per government guidelines.

Navigation – Update Disability

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Disability

Personal Details

Voluntary Self-Identification of Disability

Form CC-305
OMB Control Number 1250-0005
Expires 1/31/2020

Why are you being asked to complete this form?

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities.¹ To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.

How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition.

Disabilities include, but are not limited to:

- Blindness
- Deafness
- Cancer
- Diabetes
- Epilepsy
- Autism
- Cerebral palsy
- HIV/AIDS
- Schizophrenia
- Muscular dystrophy
- Bipolar disorder
- Major depression
- Multiple sclerosis (MS)
- Missing limbs or partially missing limbs
- Post-traumatic stress disorder (PTSD)
- Obsessive compulsive disorder
- Impairments requiring the use of a wheelchair
- Intellectual disability (previously called mental retardation)

Please select one of the options below:

YES, I HAVE A DISABILITY (or previously had a disability)

NO, I DON'T HAVE A DISABILITY

I DON'T WISH TO ANSWER

Your Name Susana Ramirez-Lapp Today's Date 12/18/2021

Reasonable Accommodation Notice

Federal law requires employers to provide reasonable accommodation to qualified individuals with disabilities. Please tell us if you require a reasonable accommodation to apply for a job or to perform your job. Examples of reasonable accommodation include making a change to the application process or work procedures, providing documents in an alternate format, using a sign language interpreter, or using specialized equipment.

¹Section 503 of the Rehabilitation Act of 1973, as amended. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

Lesson 1: Personal Profile Updates, Continued

Review and Update Veteran Status

Employees have the option to voluntarily self-identify veteran status:

- Employees may choose whether or not to identify as a Veteran
- Veterans may choose whether or not to indicate Protected status

If the Employee voluntarily specifies Veteran status, the DPR must review and approve the Employee's update request.

Navigation – Review/Update Veteran Status

NAVIGATION: Employee Self-Service > Personal Information > Personal Details > Veteran Status

Personal Details

Veteran Status

► Definitions

Self-Identification

As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please indicate by selecting the appropriate option below.

I belong to the following classifications of protected veterans (choose all that apply):

- Disabled Veteran
- Recently Separated Veteran
- Active Duty Wartime or Campaign Badge Veteran
- Armed Forces Service Medal Veteran

I am a protected veteran, but I choose not to self-identify the classifications to which I belong.

I am NOT a protected veteran.

I am NOT a veteran.

Military Discharge Date

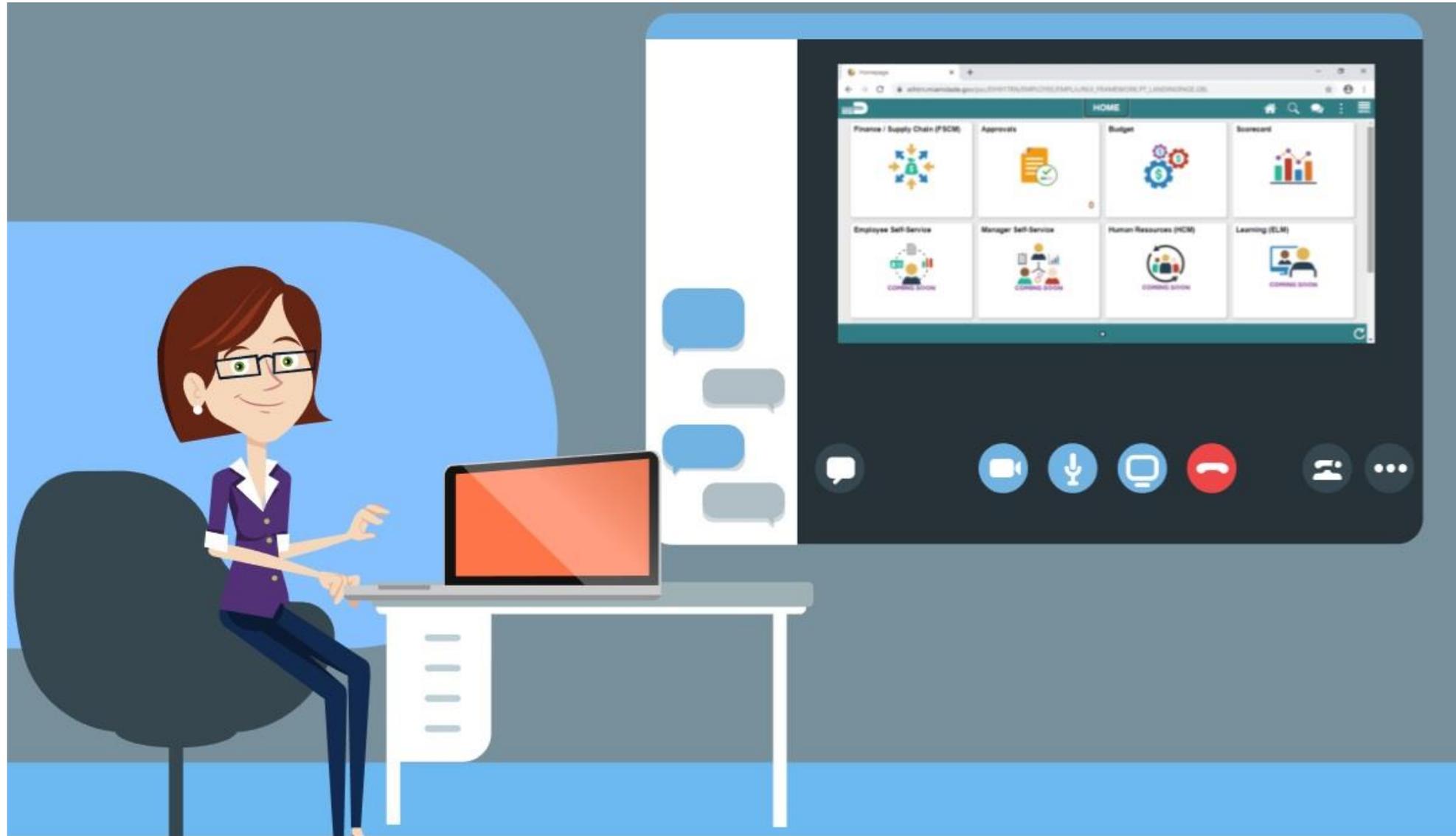
Reasonable Accommodation Notice

If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are not inconsistent with the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended.

The information you submit will be kept confidential, except that (i) supervisors and managers may be informed regarding restrictions on the work or duties of disabled veterans, and regarding necessary accommodations; (ii) first aid and safety personnel may be informed, when and to the extent appropriate, if you have a condition that might require emergency treatment; and (iii) Government officials engaged in enforcing laws administered by the Office of Federal Contract Compliance Programs, or enforcing the Americans with Disabilities Act, may be informed.

Lesson 1: Activities and Exercises



Lesson 1: Lesson Summary

Employees review, edit and update their personal profile in INFORMS

- Request An Address Change
- Review, Edit and Update Contact Details
- Review and Edit Ethnic Groups
- Review and Edit Emergency Contacts
- Update Disability
- Review and Update Veteran Status

Lesson 2: Profile Management

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

- Perform Profile Management
- Review and Edit Certifications & Licenses
- Review and Edit Educational Details

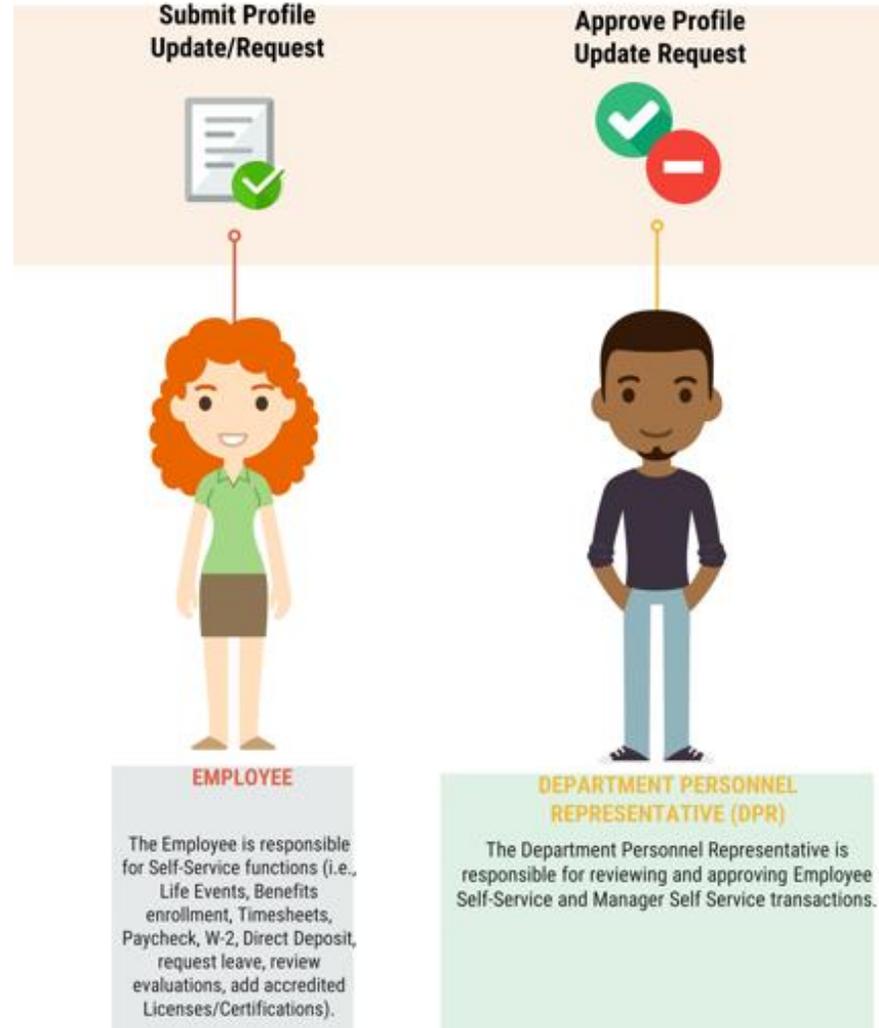
Lesson 2: Profile Management, Continued

Employees are empowered to manage Profile information such as:

- Education
- Qualifications
- Licenses and Certifications
- Driver License

Lesson 2: Profile Management, Continued

PROFILE UPDATE BUSINESS PROCESS



Lesson 2: Profile Management, Continued

Perform Profile Management

Employees may review and/or submit a request to update data such as:

- Talent (e.g. Qualifications, etc.)
- Additional Information (e.g. Driver License, etc.)

INFORMS notifies DPRs when an employee update request requires review and approval.

Lesson 2: Profile Management, Continued

Review and Edit Certifications & Licenses

Employee requests to update License and Certification data must include:

- Issue Date and Expiration Date of the License or Certification
- License Name
- License/Certification Number

INFORMS notifies DPRs when Employees request an update to their License and Certification data.

Navigation – Licenses and Certifications

NAVIGATION: Employee Self-Service > Talent Profile > Qualifications > Licenses and Certifications

License	Status	Edit/View
MDC Supervisory Cert Program		>
Profess Human Resources Cert	Pending Approval	>

Lesson 2: Profile Management, Continued

Review and Edit Educational Details

Employees are empowered to submit requests to update academic accomplishments in INFORMS.

- Degree
- Date Acquired
- School

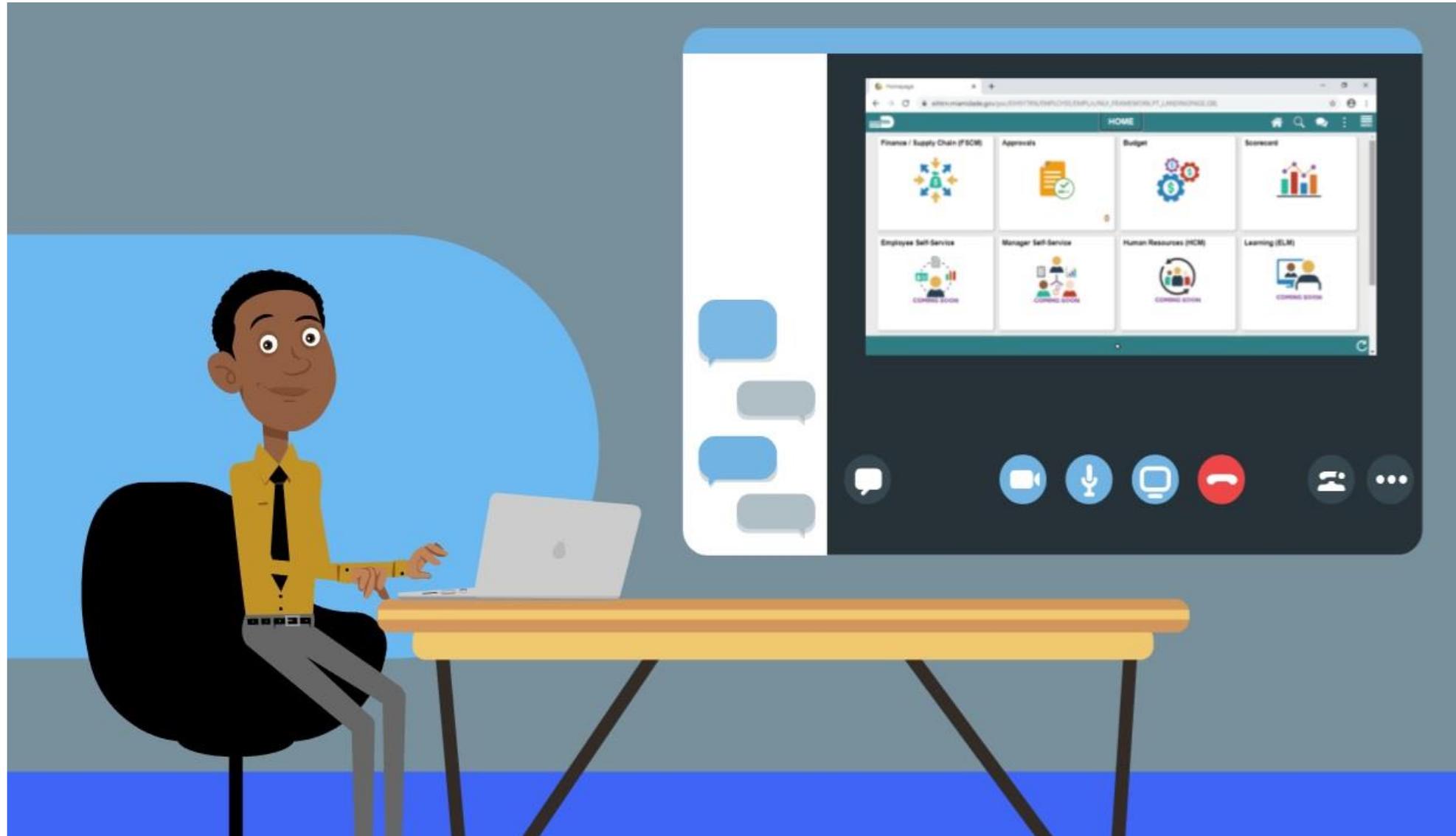
INFORMS notifies DPRs when Employees request an update to their Educational Details.

Navigation – Perform Education Details

NAVIGATION: Employee Self-Service > Talent Profile > Education

Talent Profile			
Degrees			
+			
Degree	Major Code	Status	Edit/View
Associate of Business Admin	Business Administration	Pending Approval	>
Bachelor degree			>
Bachelor degree	Accounting		>
High School Diploma			>
Master degree	Accounting		>

Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Employees view, edit and submit requests to update their profile details in INFORMS

- Perform Profile Management
- Review and Edit Certifications and Licenses
- Review and Edit Educational Details

Lesson 3: Submit Resignation or Retirement Request

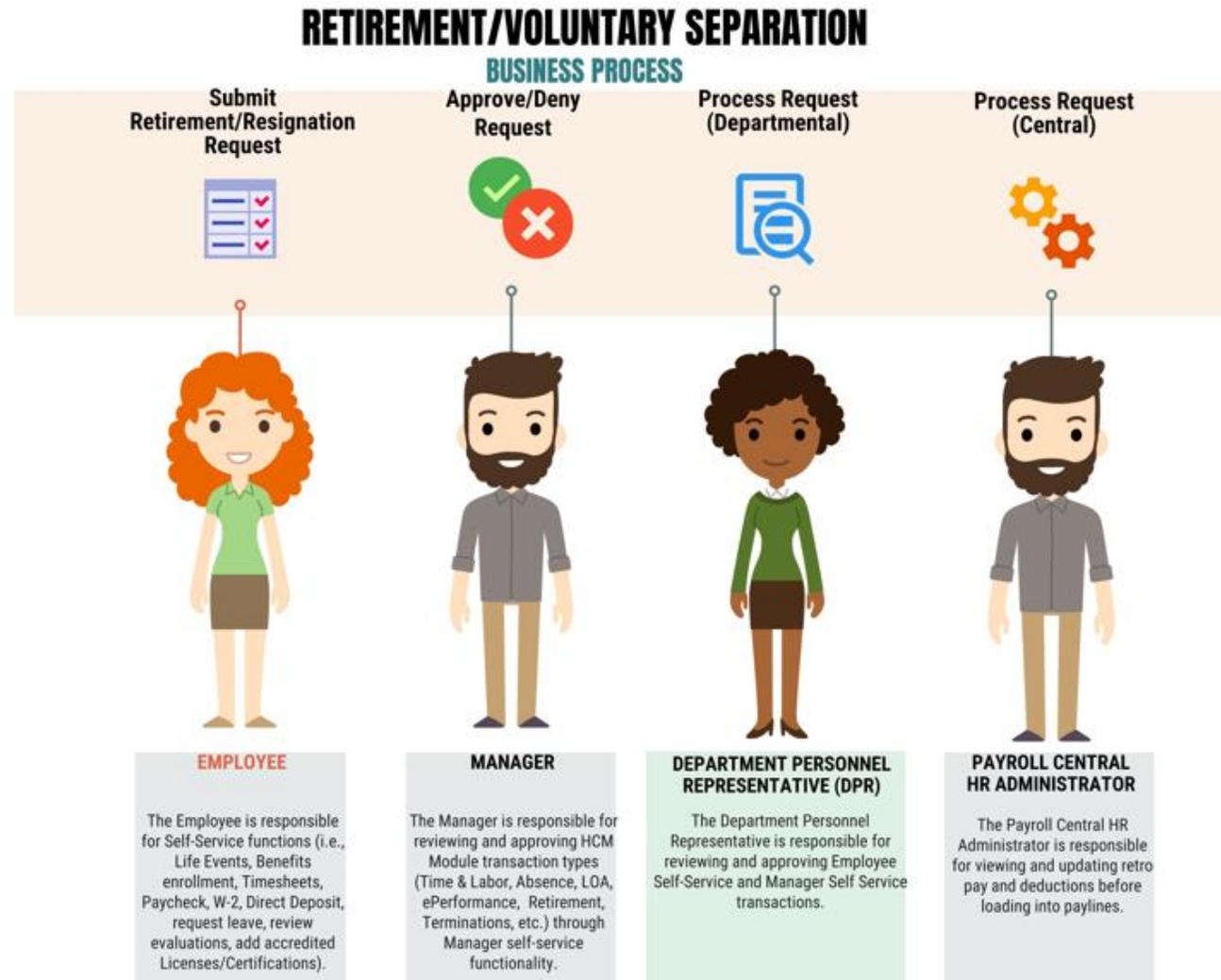
At the conclusion of this lesson, participants will be able to:

- Submit a Resignation Request
- Submit a Retirement Request

Lesson 3: Key Terms

Term	Definition
Resignation	Voluntary separation from County employment.
Retirement	An employee's retirement from County service, if eligible.

Lesson 3: Submit Resignation or Retirement Request, Continued



Lesson 3: Submit Resignation or Retirement Request, Continued

Employees are empowered to submit the following in INFORMS:

- Resignation Request
- Retirement Request

Lesson 3: Submit Resignation or Retirement Request, Continued

Submit Resignation Request

Employees may submit a resignation request in INFORMS.

- Voluntary Resignation
- Used when projects / assignments end
- The position held by the employee becomes vacant

DPRs were involved in legacy system terminations; now with INFORMS, Managers are involved.

Navigation – Submit Resignation Request

NAVIGATION: Employee Self-Service > Personal Details > Related Actions > Job > Submit Resignation

The screenshot shows a mobile application interface for submitting a resignation request. The title bar is dark teal with a back arrow, the word 'HOME', the title 'Resignation', and icons for home, search, chat, and a menu. A green 'Submit' button is in the top right corner. The form is divided into three sections: 'Job Information', 'Resignation Details', and 'Attachments'. The 'Job Information' section lists: Job Title Assistant, Position Title Assistant, Department OMB, Location 6950 NW 41ST ST, Regulatory Region United States, Reports To, and Supervisor. The 'Resignation Details' section includes: *Last Working Day 03/28/2022 (with a calendar icon), Reason Voluntary Resignation (with a dropdown arrow), and Comments ch 28, I will be resigning from the County. (with expand/collapse arrows). The 'Attachments' section states 'You have not added any Attachments.' and has an 'Add Attachment' button.

Job Information

Job Title Assistant
Position Title Assistant
Department OMB
Location 6950 NW 41ST ST
Regulatory Region United States
Reports To
Supervisor

Resignation Details

*Last Working Day 03/28/2022
Reason Voluntary Resignation
Comments ch 28, I will be resigning from the County.

Attachments

You have not added any Attachments.

Add Attachment

Lesson 3: Submit Resignation or Retirement Request, Continued

Submit Retirement Request

Employees may submit a retirement request in INFORMS.

- Benefits continue
- The Position held by the Employee becomes vacant

DPRs were involved in legacy system retirements; now, Managers are involved.

Navigation – Submit Retirement Request

NAVIGATION: Employee Self-Service > Personal Details > Related Actions > Job > Submit Retirement

The screenshot shows a mobile application interface for submitting a retirement request. The page is titled "Retirement" and is part of the "Personal Details" section. It is divided into four main sections: Job Information, Approval Details, Retirement Details, and Attachments. The Job Information section lists details such as Job Title (Correctional Sergeant), Department (INTAKE & RELEASE UNIT), Position (Correctional Sergeant), Location (6950 NW 41ST ST), Regulatory Region (United States), Reports To (Yeni Arias), and Supervisor. The Approval Details section shows the Status as "In Approval Process" and includes a button for "Approval chain" with a right-pointing arrow. The Retirement Details section lists the Last Working Day as 12/31/2022, the Reason as Retirement, and the Comments as Retirement Example for INFORMS. The Attachments section states "You have not added any Attachments."

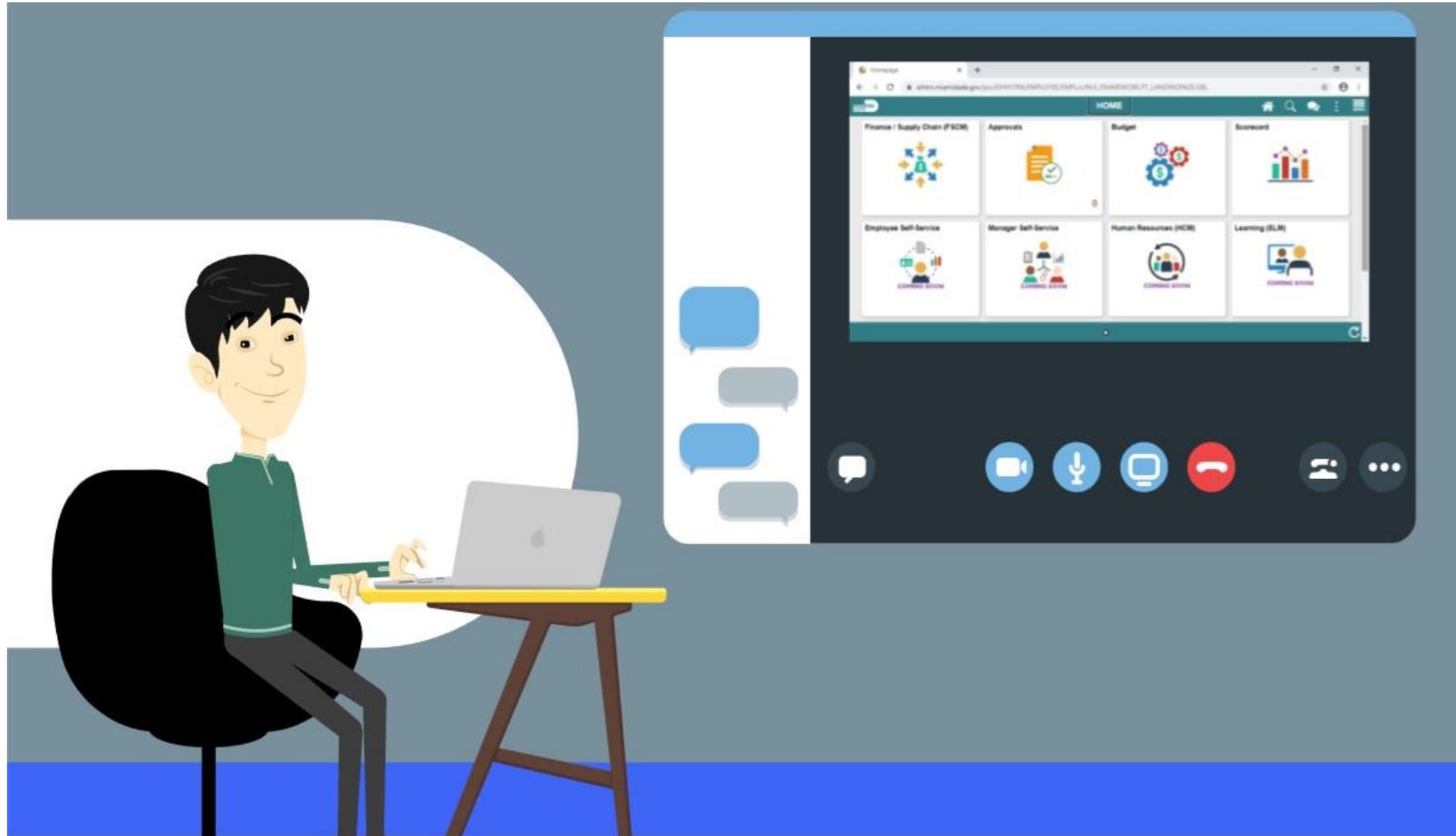
Job Information	
Job Title	Correctional Sergeant
Department	INTAKE & RELEASE UNIT
Position	Correctional Sergeant
Location	6950 NW 41ST ST
Regulatory Region	United States
Reports To	Yeni Arias
Supervisor	

Approval Details	
Status	In Approval Process
Approval chain >	

Retirement Details	
Last Working Day	12/31/2022
Reason	Retirement
Comments	Retirement Example for INFORMS

Attachments
You have not added any Attachments.

Lesson 3: Activities and Exercises



Lesson 3: Lesson Summary

Employees initiate the following in INFORMS:

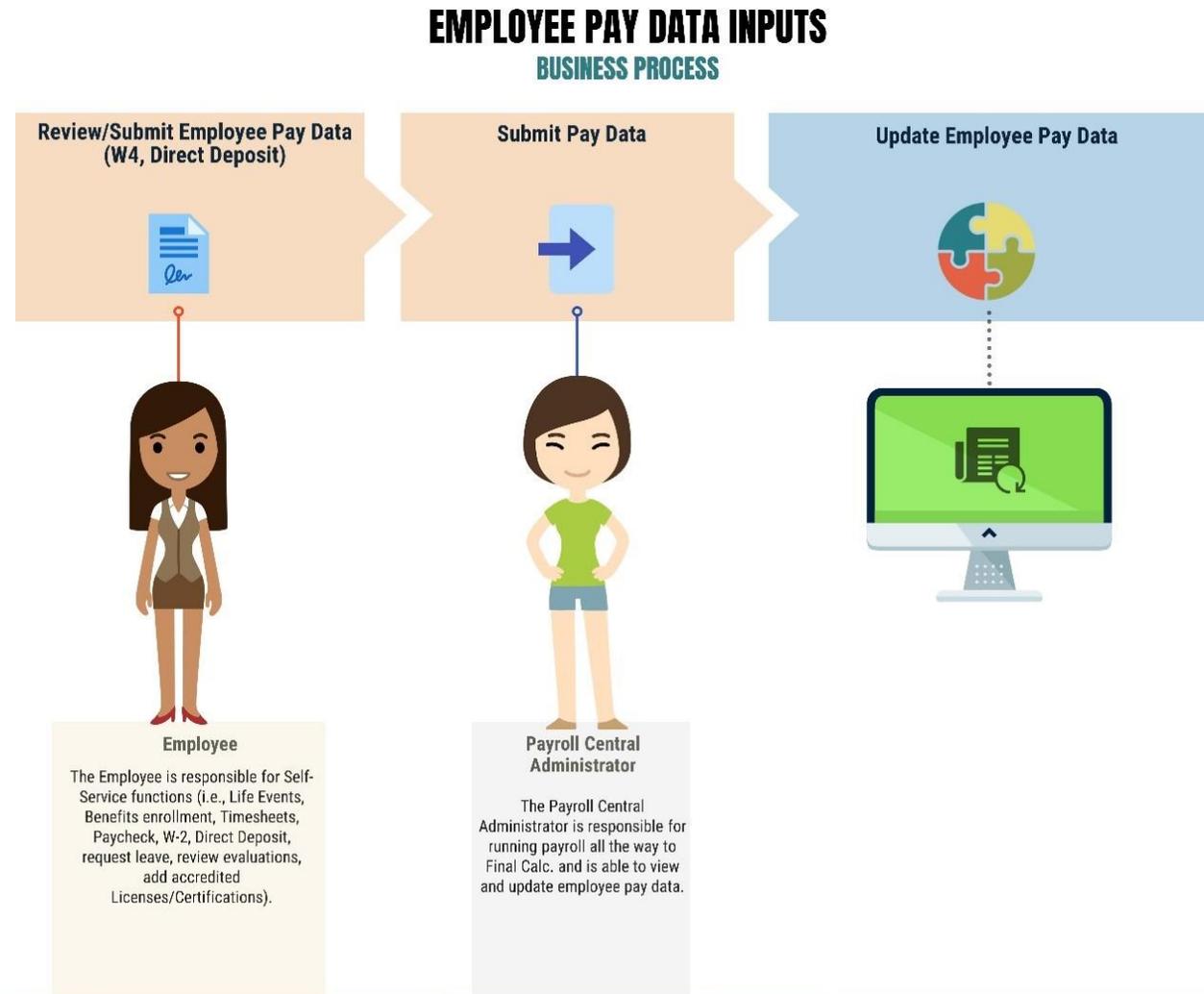
- Submit a Resignation Request
- Submit a Retirement Request

Lesson 4: Employee Self-Service Payroll Data Updates

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

- Update W-4 Information
- Request Direct Deposit

Lesson 4: Employee Self-Service Payroll Data Updates, Continued



Lesson 4: Employee Self-Service Payroll Data Updates, Continued

Employees are empowered to perform the following in INFORMS:

- Update W-4 Information
- Request Direct Deposit

Lesson 4: Employee Self-Service Payroll Data Updates, Continued

Update W-4 Information

The Employee is empowered to adjust their W-4 withholding in INFORMS.

Navigation – W-4

NAVIGATION: Employee Self-Service > Payroll > W-4 Tax Withholding

Payroll     

[New Window](#) | [Help](#) | [Personalize Page](#) | 

W-4 Withholding Certificate

Tamie Attaway
Miami Dade County

Social Security Number

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS www.irs.gov.

Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Address

1st Avenue
APT 001
Miami FL 33132

Filing Status

Single or Married filing separately

Married filing jointly (or Qualifying widow(er))

Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Lesson 4: Employee Self-Service Payroll Data Updates, Continued

Request Direct Deposit

The Employee may add and manage up to three (3) direct deposit accounts in INFORMS.

- Manage multiple direct deposit accounts
- Specify deposit by dollar amount or by percentage

INFORMS ePay module is fully integrated with Payroll.

Navigation – Direct Deposit

NAVIGATION: Employee Self-Service > Payroll > Direct Deposit

Payroll

     MENU

Direct Deposit

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
1	JointAccount999	Direct Deposit	063100277	XXXX4321	Checking	5.00%	>
Last	Checking999	Direct Deposit	87654321	XXXX5678	Checking	Remaining Balance	>

Print Option

Send a paper copy of the direct deposit pay statement to my home. Yes

Lesson 4: Activities and Exercises



Lesson 4: Lesson Summary

Employees are empowered to perform the following in INFORMS

- Update W-4 Information
- Request Direct Deposit

Lesson 5: Review Paychecks and W-4

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

- Review Paychecks
- Review W-4

Lesson 5: Key Terms

Term	Definition
Bi-weekly Pay Rate	The Employee's Base Salary with any additional Components of Pay that they are entitled to.

Lesson 5: Review Paychecks and W-4, Continued

EMPLOYEE PAY DATA INQUIRY BUSINESS PROCESS

View Employee Pay Data
(Paycheck, W4,)



Employee

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-2, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

Lesson 5: Review Paychecks and W-4, Continued

Employees are empowered to perform the following in INFORMS:

- Review Paychecks
- Review W-4

Lesson 5: Review Paychecks and W-4, Continued

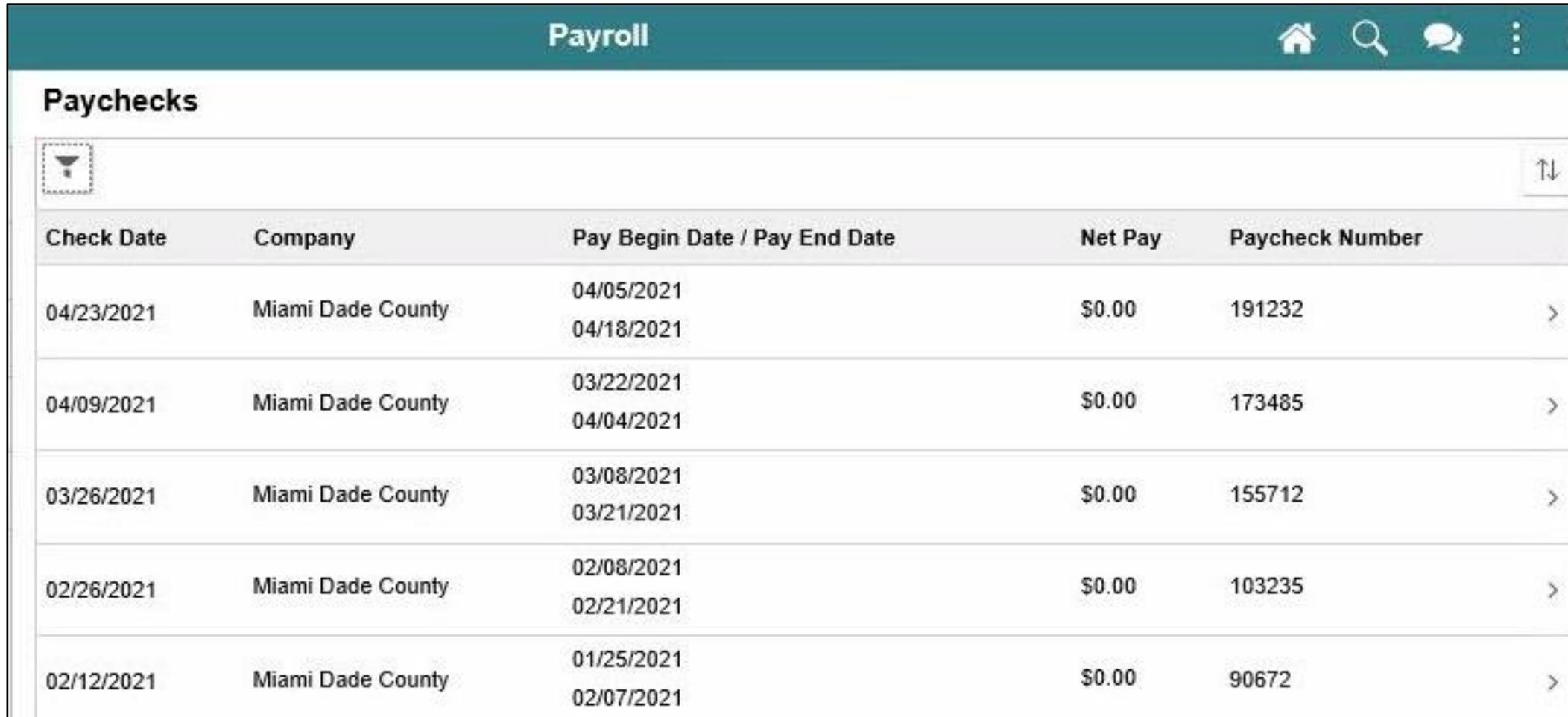
Review Paychecks

The Employee is empowered to review their paychecks in INFORMS.

- Employees can search, sort and filter to access their pay stubs
- Pay stubs specify pay rate by pay period

Navigation – Review Paychecks

NAVIGATION: Employee Self-Service > Payroll > Paychecks



The screenshot displays a web application interface for reviewing paychecks. At the top, there is a teal header bar with the word "Payroll" in white. To the right of the header are icons for home, search, chat, and a menu. Below the header, the page title "Paychecks" is displayed. A table lists several paychecks, each with a check date, company name, pay period, net pay amount, and a unique paycheck number. A right arrow icon is present at the end of each row, indicating that more details are available for each entry. A search icon is visible in the top right corner of the table area.

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
04/23/2021	Miami Dade County	04/05/2021 04/18/2021	\$0.00	191232
04/09/2021	Miami Dade County	03/22/2021 04/04/2021	\$0.00	173485
03/26/2021	Miami Dade County	03/08/2021 03/21/2021	\$0.00	155712
02/26/2021	Miami Dade County	02/08/2021 02/21/2021	\$0.00	103235
02/12/2021	Miami Dade County	01/25/2021 02/07/2021	\$0.00	90672

Lesson 5: Review Paychecks and W-4, Continued

Review W-4

The Employee is empowered to review their W-4 in INFORMS.

- Review current withholdings
- Print a copy

Navigation – Review W-4

NAVIGATION: Employee Self-Service > Payroll > W-4 Tax Withholding

The screenshot shows a web interface for a payroll system. At the top, there is a dark teal header with the word "Payroll" in white. To the right of the header are icons for home, search, chat, and a menu. Below the header, there are links for "New Window", "Help", "Personalize Page", and a calendar icon. The main content area is titled "W-4 Withholding Certificate" and includes the name "Tamie Attaway" and "Miami Dade County". A section for "Social Security Number" is visible but empty. Below this, there is a paragraph of instructions: "Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS [www.irs.gov](\"http://www.irs.gov\")." The form is divided into sections: "Step 1: Personal Information", "Address", and "Filing Status". The "Filing Status" section has three radio button options: "Single or Married filing separately", "Married filing jointly (or Qualifying widow(er))", and "Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual)". At the bottom, there is a note: "Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website."

Payroll Home Search Chat Menu

[New Window](#) | [Help](#) | [Personalize Page](#) | [Calendar](#)

W-4 Withholding Certificate

Tamie Attaway
Miami Dade County

Social Security Number

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS www.irs.gov.

Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Address

1st Avenue
APT 001
Miami FL 33132

Filing Status

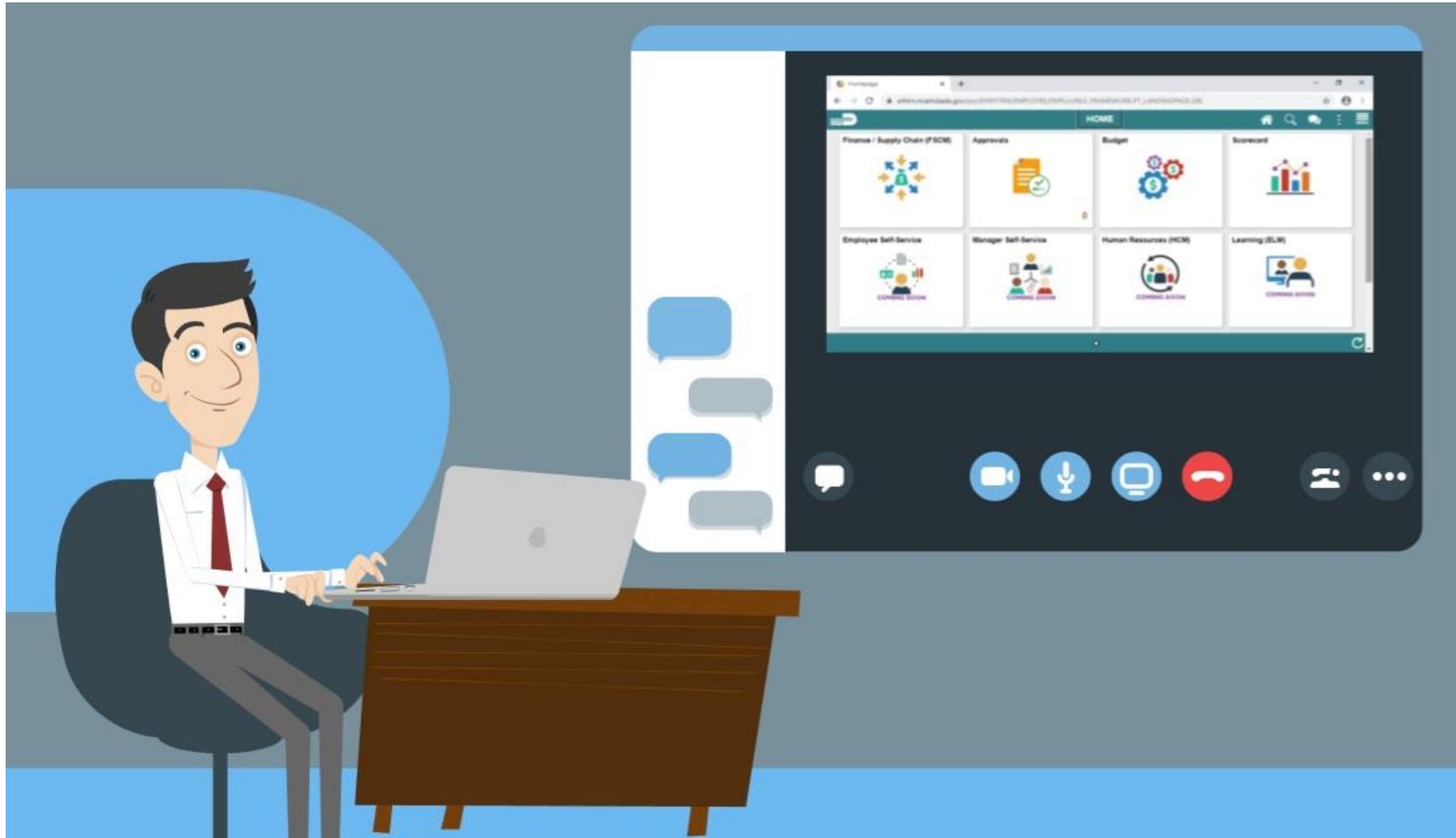
Single or Married filing separately

Married filing jointly (or Qualifying widow(er))

Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Lesson 5: Activities and Exercises



Lesson 5: Lesson Summary

Employees are empowered to perform the following in INFORMS

- Review Paychecks
- Review W-4

Lesson 6: Employee Self-Evaluation

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

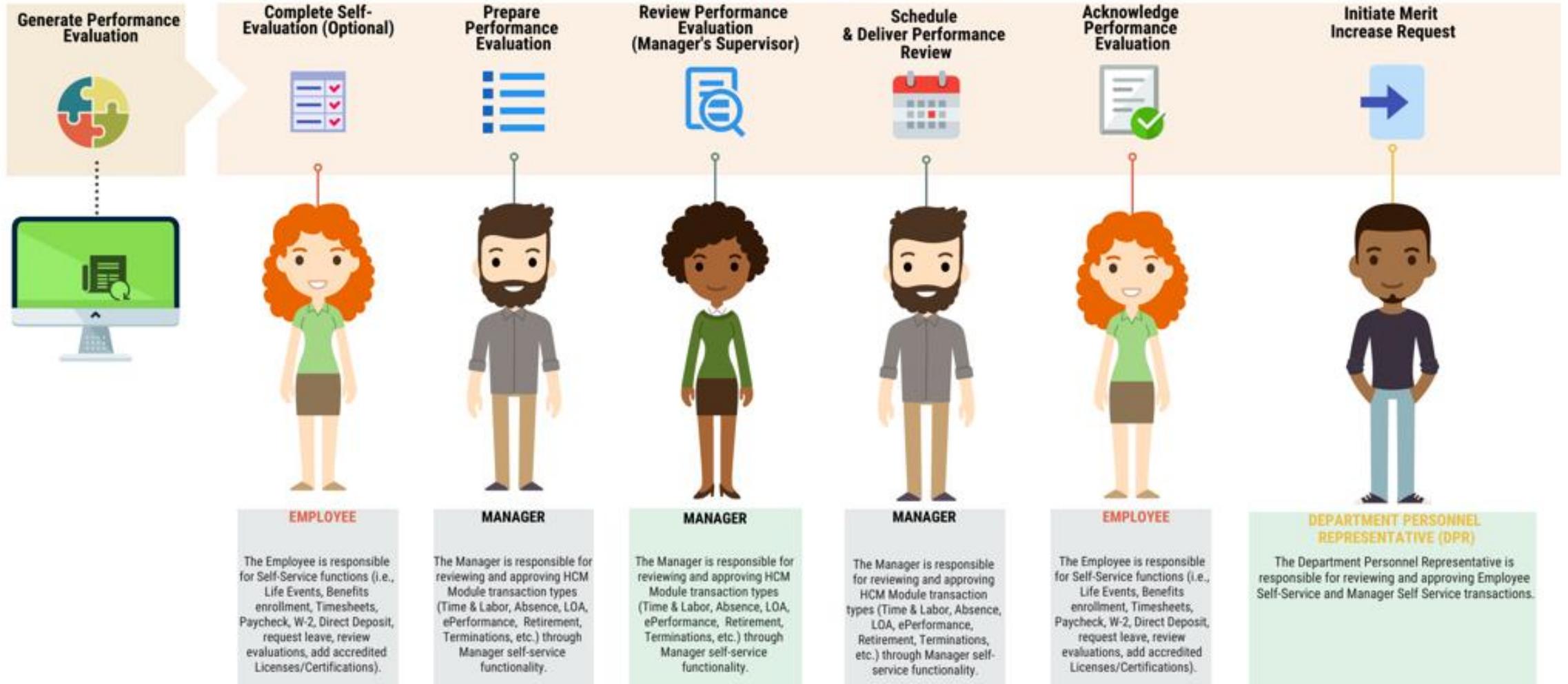
- Complete an optional Employee Self-Evaluation in INFORMS

Lesson 6: Key Terms

Term	Definition
Self Evaluation	An optional self-assessment performed by Employees prior to their Performance Evaluation.

Lesson 6: Employee Self-Evaluation, Continued

PERFORMANCE REVIEW BUSINESS PROCESS



Lesson 6: Employee Self-Evaluation, Continued

Employee Self-Evaluation (optional)

The Employee may perform an optional Self Evaluation in INFORMS

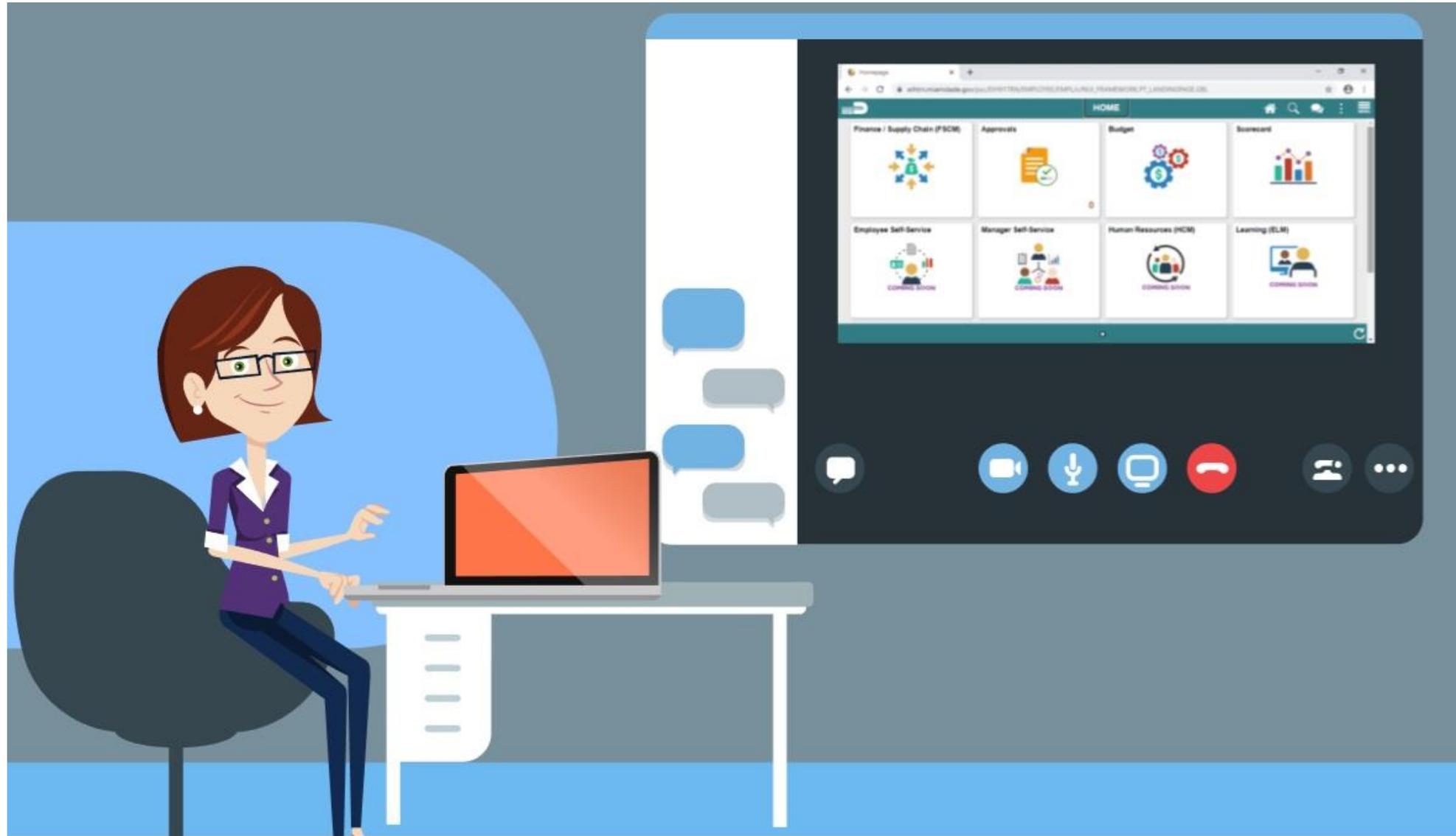
- List Accomplishments for the evaluation period
- INFORMS routes completed self-evaluation documents to the Supervisor

Navigation – Employee Self-Evaluation

NAVIGATION: Employee Self-Service > Performance > My Current Documents

The screenshot displays the 'Performance Process' web application interface. At the top, there is a teal header with navigation icons (home, search, chat, menu) and the text 'Performance Process'. Below the header, the page title is 'MDC-Annual Review EE', followed by 'Save' and 'Complete' buttons. The main section is titled 'Self-Evaluation - Update and Complete' and includes 'Print', 'Notify', and 'Export' options. A metadata bar shows 'Created By: Template' and '01/19/2022 12:35PM'. The 'Accomplishments' section is expanded to show a 'Description' field with a rich text editor toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink, table) and a text area containing a vertical cursor. Another metadata bar below the editor shows 'Created By: Template' and '01/19/2022 12:35PM'. The 'Attachments' section at the bottom states 'No Attachments have been added to this document' and features an 'Add Attachment' button with a plus icon.

Lesson 6: Activities and Exercises



Lesson 6: Lesson Summary

Employees are empowered to perform the following in INFORMS:

- Complete an Employee Self-Evaluation in INFORMS

Lesson 7: Participant Performance Review, Continued

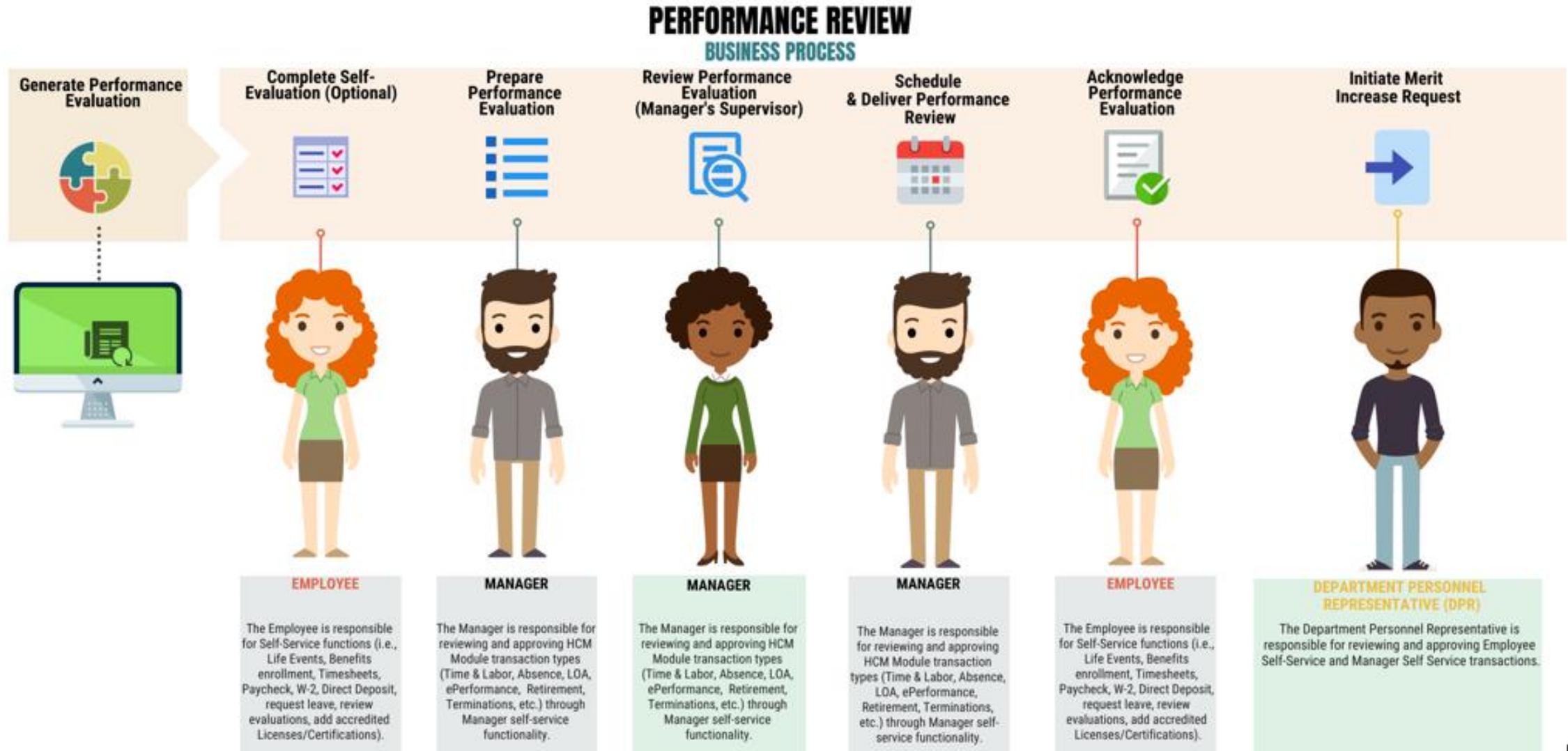
At the conclusion of this lesson, participants will be able to:

- Acknowledge a Performance Review in INFORMS

Lesson 7: New Terms

Term	Definition
Acknowledge	The act of completing an evaluation after an Employee reviews their Performance Evaluation document in INFORMS.

Lesson 7: Participant Performance Review, Continued



Lesson 7: Participant Performance Review, Continued

The Employee's Supervisor schedules and conducts a Performance Review with the Employee for their current review period.

The Employee:

- Reviews their performance evaluation document
- Enters comments (optional)
- Acknowledges their Review

The Employee may print their evaluation if desired.

Navigation – Participant Performance Review

NAVIGATION: Employee Self-Service > Performance > My Current Documents

The screenshot displays a web application interface for a performance review. At the top, the title is "Performance Process". Below this, the document type is "MDC-Annual Review EE". The main heading is "Manager Evaluation - Acknowledge" for "Les Chatham". A profile picture of a person is shown next to the name. The page includes a table of details: Job Title (Accountant 2), Document Type (MDC-Annual Review EE), Template (Employee Performance Eval), Status (Pending Acknowledgement), Manager (Emerald Ritchie), Period (01/01/2021 - 01/01/2022), Document ID (28399), and Due Date (12/25/2021). Under "Employee Data", the Employee ID is 00319256 and the Department is FN06020000 ACCOUNTING SECTION. A message states: "This document is currently waiting for your acknowledgment. Select the Acknowledge button to confirm that you and your manager have discussed this document. Your name will be placed in the signature section on the document acknowledging that the review was held." There are buttons for "Expand All", "Collapse All", and "View Graphical Rating". The "Section 1 - PERFORMANCE OBJECTIVES" is expanded, showing "QUANTITY OF WORK" with a description: "Includes amount of work performed." Below this, the "Manager Rating" is "3 - Satisfactory" and the "Avg Rating" is "3 - Satisfactory". The "Manager Comments" section contains the text: "During this evaluation period, Mr. Chatham proved to be a very valuable contributor to the unit. His responsibilities included sorting by vendor name, department, due date and voucher number. During this evaluation period, Mr. Chatham performed the process of auditing all the vendors with very little assistance." At the bottom, it shows "Created By: Template 02/09/2022 3:50PM" and "Last Modified By: Emerald Ritchie 02/23/2022 3:34PM".

Job Title	Accountant 2	Manager	Emerald Ritchie
Document Type	MDC-Annual Review EE	Period	01/01/2021 - 01/01/2022
Template	Employee Performance Eval	Document ID	28399
Status	Pending Acknowledgement	Due Date	12/25/2021

Employee Data

Employee ID	00319256
Department	FN06020000 ACCOUNTING SECTION

Section 1 - PERFORMANCE OBJECTIVES

QUANTITY OF WORK

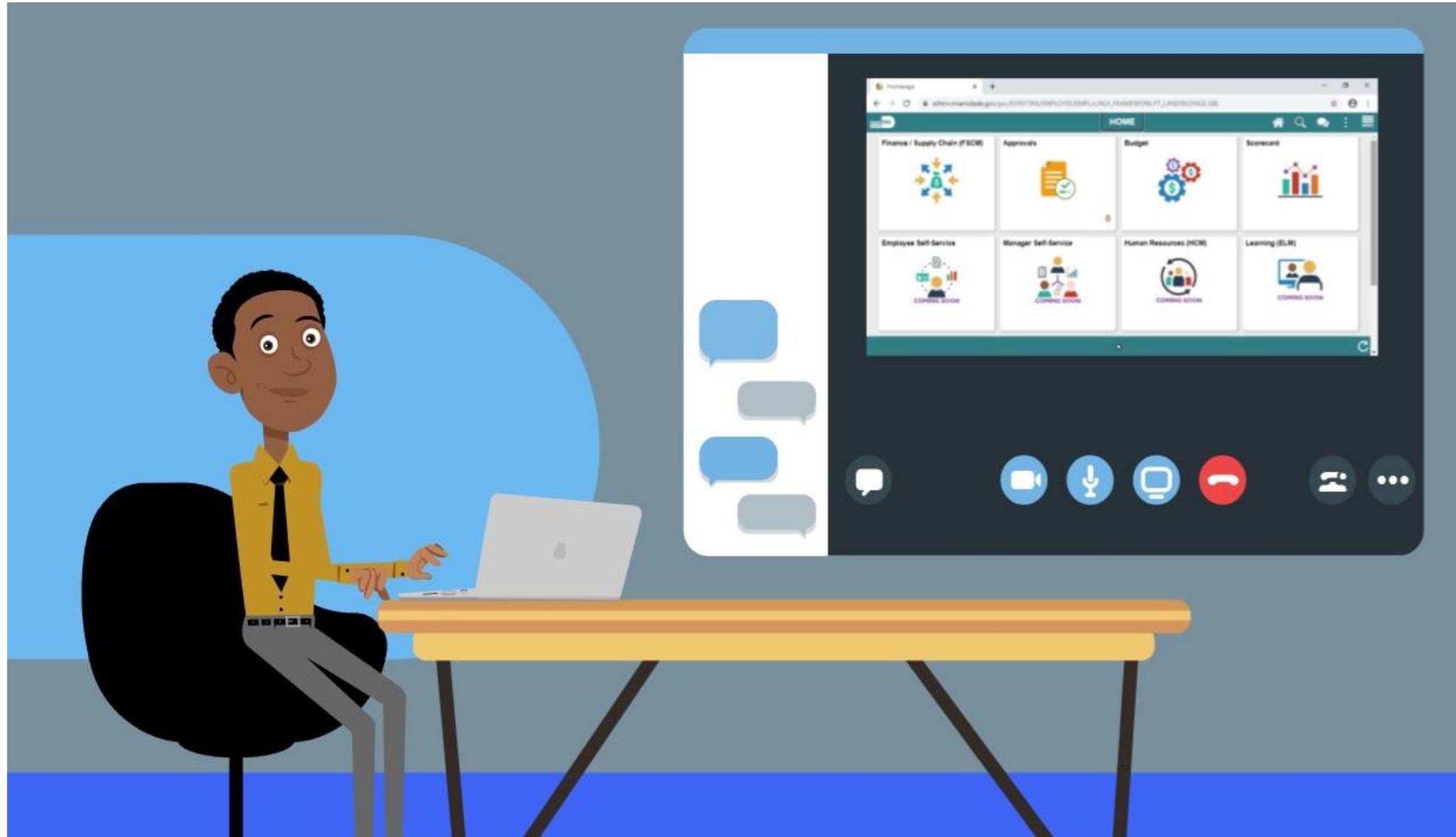
Description : Includes amount of work performed.

Manager Rating 3 - Satisfactory Avg Rating 3 - Satisfactory

Manager Comments: During this evaluation period, Mr. Chatham proved to be a very valuable contributor to the unit. His responsibilities included sorting by vendor name, department, due date and voucher number. During this evaluation period, Mr. Chatham performed the process of auditing all the vendors with very little assistance.

Created By: Template 02/09/2022 3:50PM
Last Modified By: Emerald Ritchie 02/23/2022 3:34PM

Lesson 7: Activities and Exercises



Lesson 7: Lesson Summary

Employees perform the following Performance Review activities in INFORMS:

- Review and add Comments to their Performance Evaluation
- Acknowledge their Performance Evaluation

Module 3: Course Summary

Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

Course Content Summary

Congratulations on completing the eProfile, ePay and ePerformance. You now understand:

- Employee Self-Service Personal Profile Updates
- Profile Management
- How to Submit Resignation or Retirement Request
- Employee Self-Service Payroll Data Updates
- How to Review Paychecks and W4
- How to Complete Employee self-evaluation (optional)
- Participant Performance Review

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

- Review and Edit Addresses
- Review and Edit Emergency Contacts
- Review and Edit Additional Information
- Update Veteran Status
- Review and Edit Disability
- Review and Edit Email Addresses
- Review and Edit Phone Numbers
- Review and Edit Ethnic Group
- Review and Edit Certifications & Licenses
- Review and Edit Educational Details
- Submit Retirement
- Submit Resignation
- Update W-4 Information
- View Paycheck
- View W-4 Information
- Complete optional Self Evaluation
- Review and Acknowledge Performance Review

For additional Information: www.miamidade.gov/informs



CONGRATULATIONS

Congratulations on successfully completing the eProfile, ePay and ePerformance course!

ESS 201 - Employee Self Service - eProfile, ePay and ePerformance