

Course ID: MSS 205  
Course: Manager Self Service - ePerformance  
Management (Employee Performance Evaluation)

# Ground Rules



Be on time



Attendance



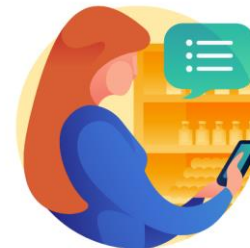
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the ePerformance Management processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>• Module 1: Course Introduction</li><li>• Module 2: ePerformance Management<ul style="list-style-type: none"><li>○ Requesting Nomination</li><li>○ Preparing an Employee's Evaluation as Manager</li><li>○ Review Employee's Evaluation as Manager's Supervisor</li><li>○ Share Evaluation with Employee as Manager</li></ul></li><li>• Module 3: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• Manager</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• ERP 101 - Overview of ERP</li><li>• ERP 102 - INFORMS Navigation, Reporting, and Online Help</li></ul>
<b>Other Related Courses</b>	<ul style="list-style-type: none"><li>• MSS 204 – Management Self-Service- Time Management</li><li>• MSS 206 - Management Self-Service- Updating Team Information</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 4 Hours</li></ul>

# 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

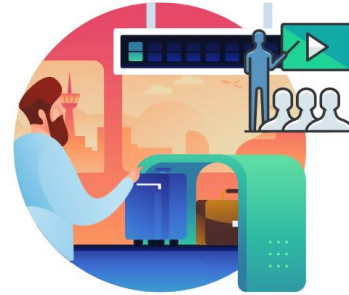
Introduction to Demonstrations, Activities, and Exercises

Key Terms

# Course Administration and Logistics



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



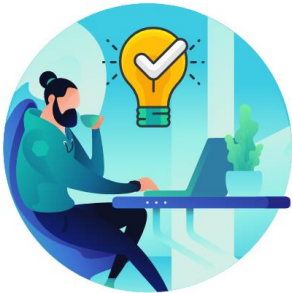
Please turn off your cell phones and refrain from checking email and the Internet while in class



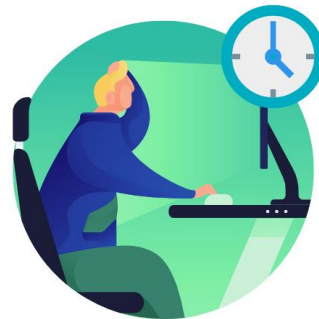
Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

- Request Nominations
- Prepare an evaluation as a Manager
- Review an employee evaluation as a Manager's Supervisor
- Share the Evaluation with your Employee as a Manager

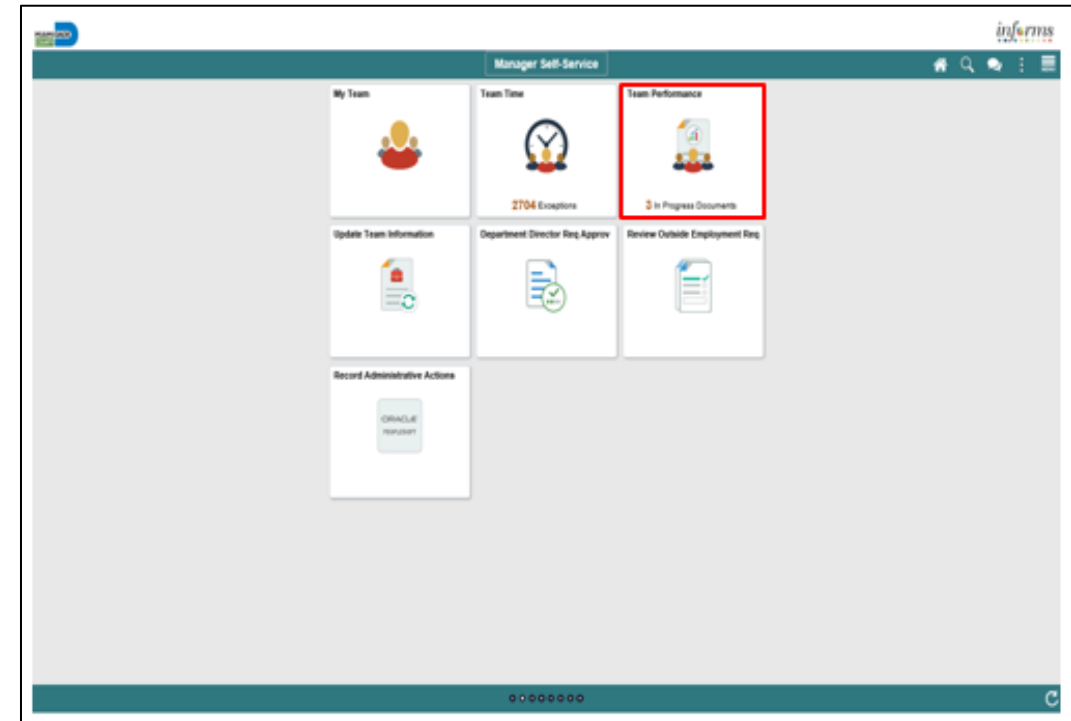
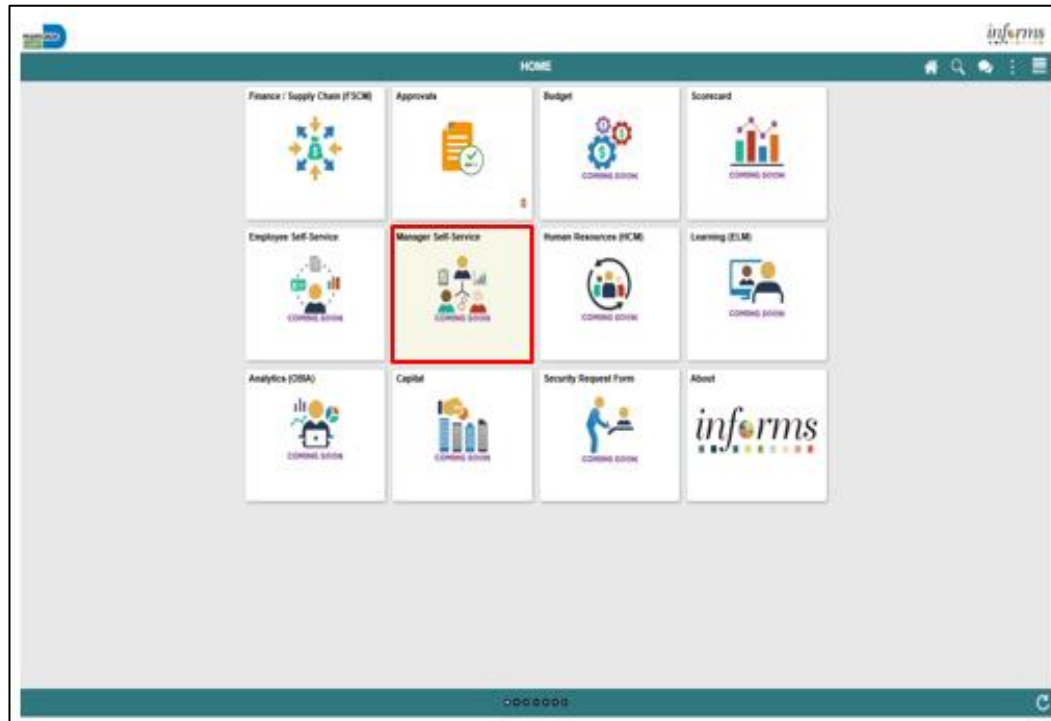
# Roles and Responsibilities

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

Role	Responsibilities
<b>Manager</b>	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

Manager Self-Service > Team Performance

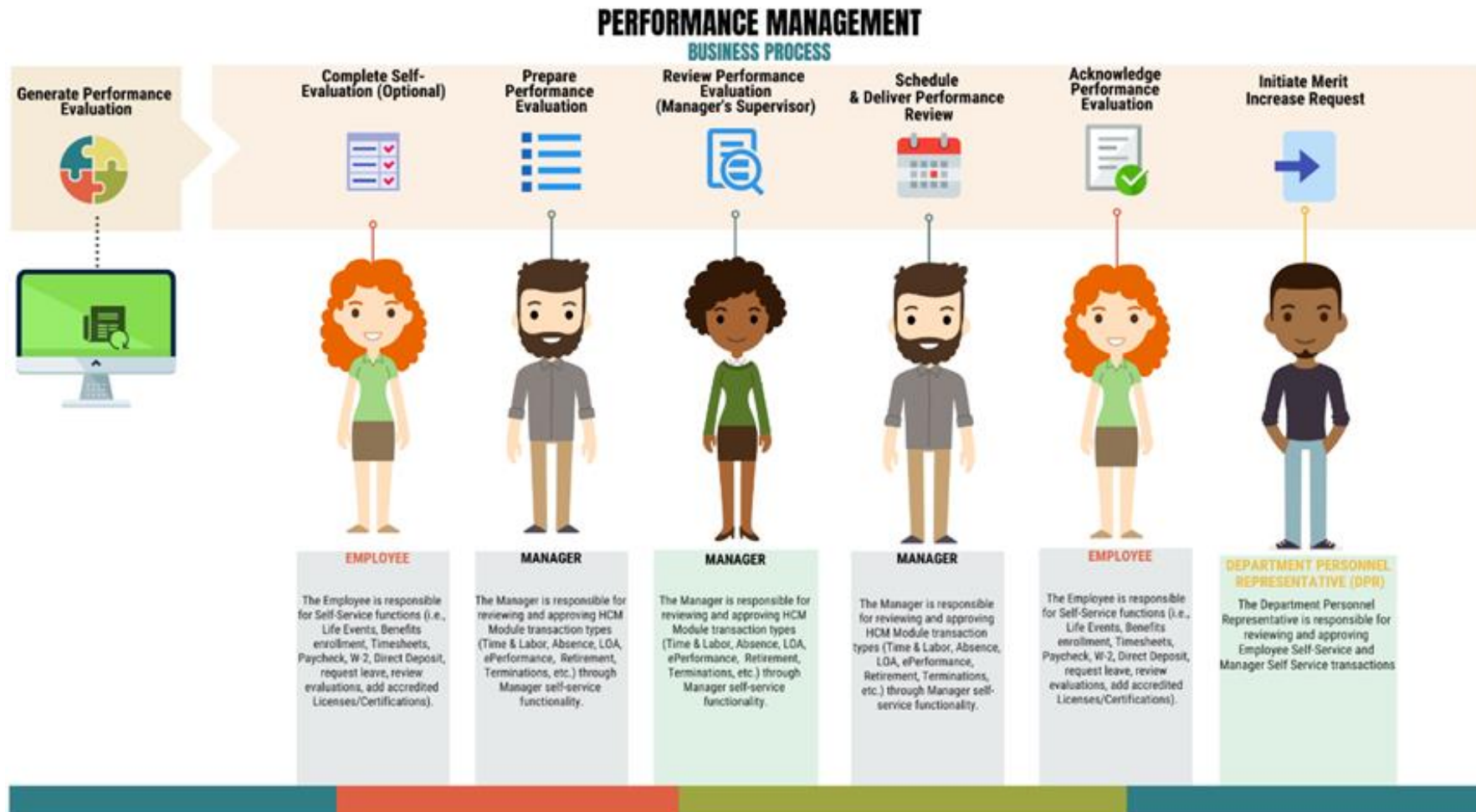




# Purpose and Benefits to Business Process

- Automation of County business processes
- Data persistence – INFORMS data is never deleted, only past-effective dated
- Decreased data redundancy - Perform all performance evaluation administration activities in a single common system (INFORMS) - eliminating manual data re-keying and, in so doing, 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 data retrieval - rapid standard and ad hoc report development and deployment capabilities
- Improve workforce efficiency via collaborative processing between reviewers and approvers
- Logical separation of duties
- Robust technical platform – high on-demand availability with minimum downtime, scalable and extensible, 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, in accordance with bargaining agreement rules.

# End-to-End Business Process

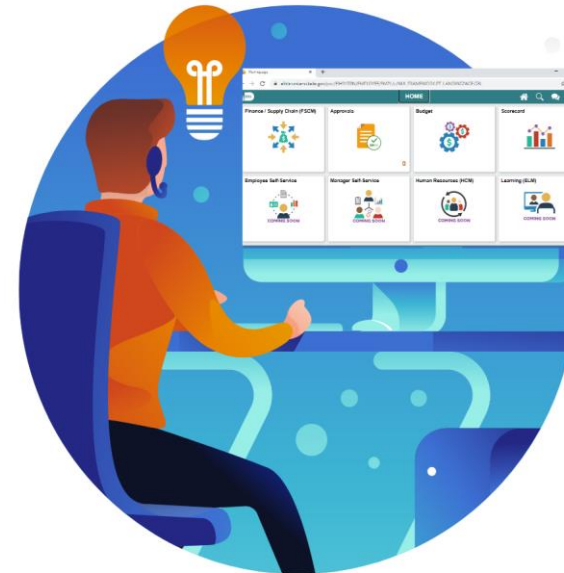


# Introduction to Activities and Exercises

- 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

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Key Changes to the Business Process

The End-to-End Business Process

Introduction to Demonstrations, Activities, and Exercises

# Module 2: ePerformance

## Module Topics

Module Introduction

**Lesson 1:** Requesting Nominations

**Lesson 2:** Preparing an Employee's Evaluation as a Manager

**Lesson 3:** Reviewing an Employee's Evaluations (Manager's Supervisor)

**Lesson 4:** Share Evaluation with Employee as Manager

# Lesson 1: Overview

- At the conclusion of this lesson, users will be able to:
  - Nominate Participants to provide additional feedback on an employee's evaluation

# Lesson 1: Requesting Nominations

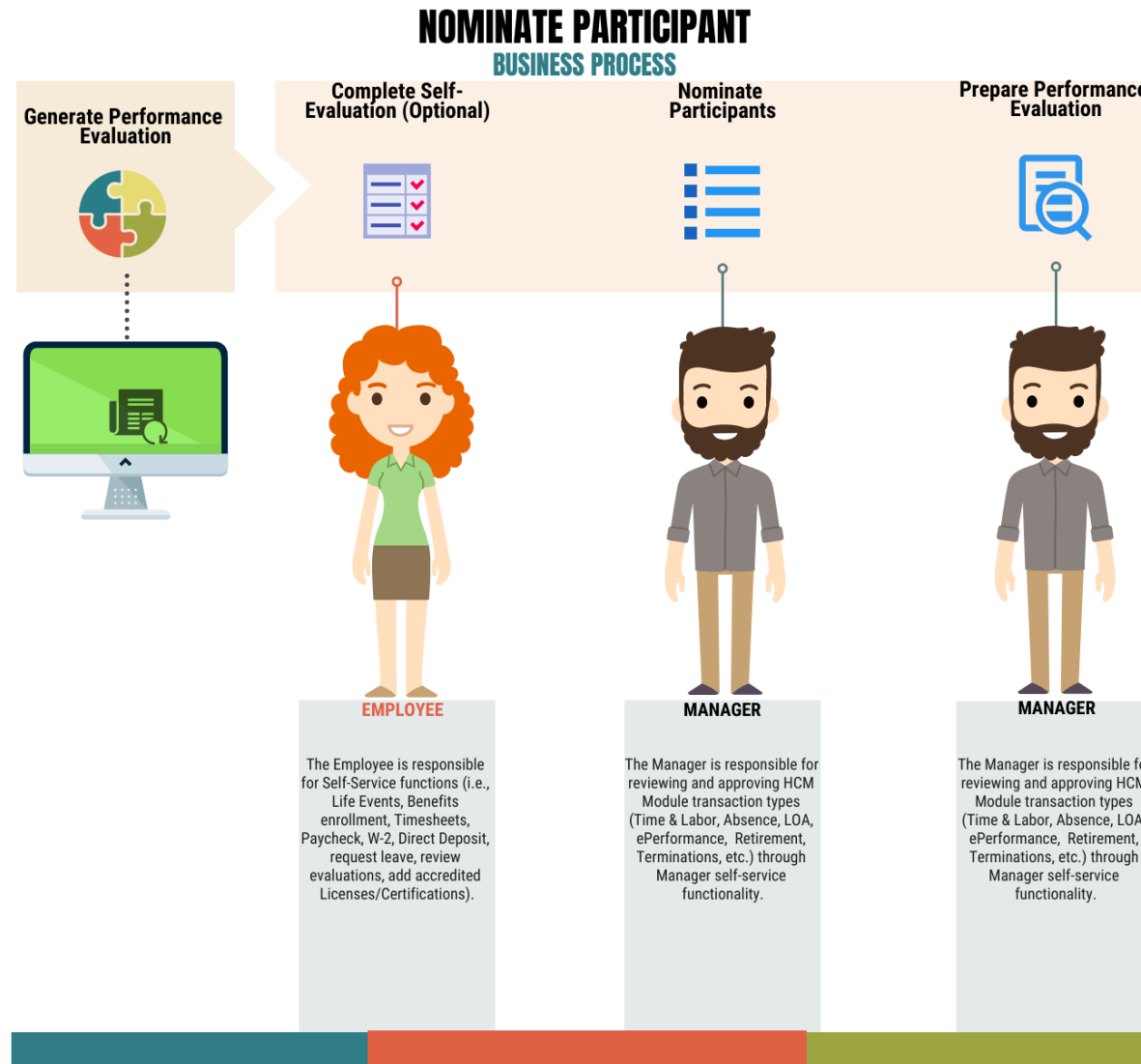
- Managers, Employees, Reviewers and Department Personnel Representatives (DPRs) use INFORMS for performance evaluation administration.
- Managers can request a nominee who will provide additional feedback on an employee's evaluation.

# Lesson 1: Key Terms

Term	Definition
<b>Nomination</b>	Inviting individuals other than the manager and employee to provide direct feedback into an employee's performance.

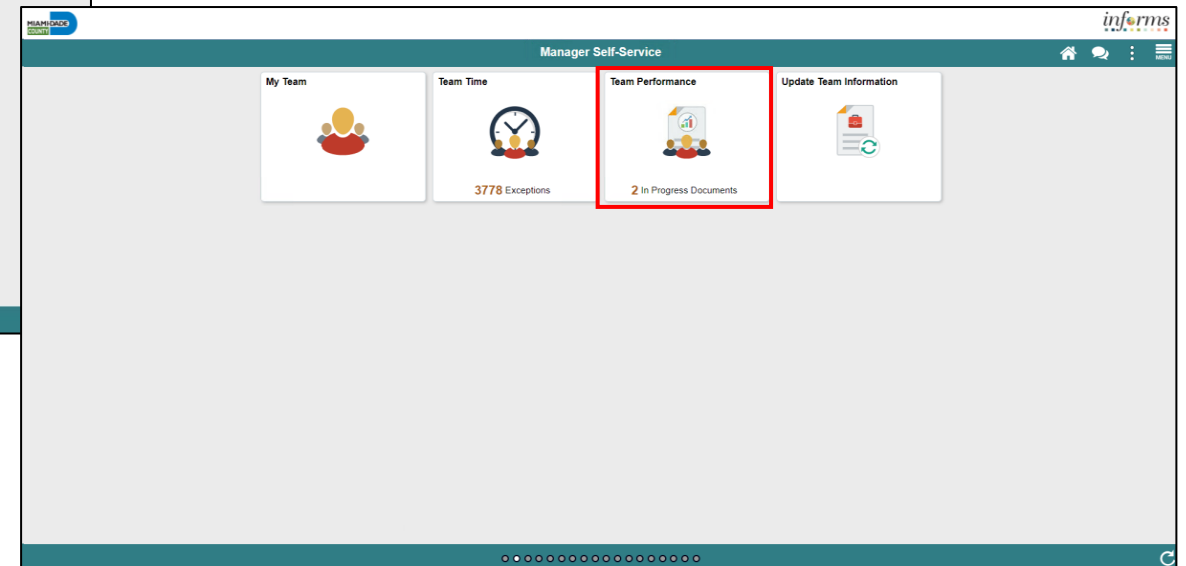
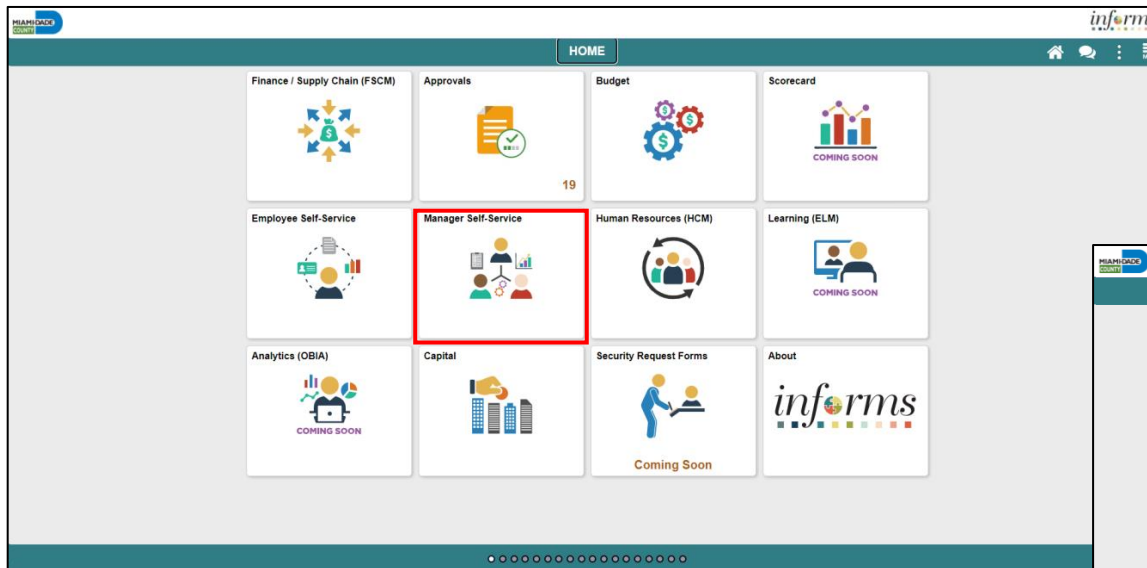


# Lesson 1: Requesting Nominations



# Lesson 1: Requesting Nominations Continued




Navigate to **Manager Self-Service > Team Performance**



# Lesson 1: Requesting Nominations Continued

1. Select the **Employee Name** under Current Documents.

The screenshot displays the 'Team Performance' interface. The left sidebar shows navigation options: 'Current Documents' (highlighted with a red box), 'Historical Documents', and 'Administrative Tasks'. The main content area is titled 'Current Documents' and features a 'Create Documents' button. Below this is a table with the following data:

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 <b>Michelle Lazo</b> Human Resources Manager	MDC-Prof/Supervisory Review ME	Evaluation in Progress	02/08/2021 02/06/2022	01/23/2022
 <b>Tressie Williams</b> Administrative Officer 3	MDC-Prof/Supervisory Review ME	Evaluation in Progress	09/07/2020 09/05/2021	08/22/2021
 <b>Nectar Ortiz</b> Senior Personnel Specialist	MDC-Prof/Supervisory Review ME	Evaluation in Progress	11/04/2019 11/01/2020	10/18/2020

The right sidebar contains 'Related Information' with an 'Add Analytics' button and a 'Performance Status' section showing a circular progress indicator.

# Lesson 1: Requesting Nominations Continued

2. Select the **Nominate Participants** hyperlink.
3. Select the **Add Nominees** hyperlink.

The screenshot displays the 'inForms' Manager Self-Service interface for a 'Performance Process'. The main content area is titled 'Manager Evaluation - Update and Submit' for Michelle Lazo, a Human Resources Manager. The interface includes a sidebar with a 'Steps and Tasks' list where 'Nominate Participants' is highlighted. The main area shows employee details, a 'Description' field for 'ACHIEVEMENT OF OBJECTIVES', and a 'Manager Comments' text area with a rich text editor. Buttons for 'Save' and 'Submit for Approval' are visible at the top right.

**Steps and Tasks**

- Michelle Lazo  
MDC-Prof/Supervisory Review ME  
02/08/2021 - 02/06/2022 [Overview](#)
- Nominate Participants**  
Due Date 02/08/2022
- Review Participant Evaluations  
Due Date 01/30/2022
- Review Self Evaluation  
Due Date 01/23/2022
- Complete Manager Evaluation  
Due Date 01/30/2022
- Update and Submit  
Pending Approval  
Share with Employee

**Manager Evaluation - Update and Submit**

Michelle Lazo

Job Title: Human Resources Manager  
Document Type: MDC-Prof/Supervisory Review ME  
Template: Employee Performance Eval  
Status: Evaluation in Progress

Manager: Dena Kelly  
Period: 02/08/2021 - 02/06/2022  
Document ID: 52353  
Due Date: 01/30/2022

**Employee Data**

Employee ID: 00035495  
Department: PD03110100 PERSONNEL MANAGEMENT - SUPPORT

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

[Expand All](#) | [Collapse All](#) | [Calculate All Ratings](#) | [Cancel Evaluation](#)

**Section 1 - PERFORMANCE OBJECTIVES**

[Expand](#) | [Collapse](#)

**ACHIEVEMENT OF OBJECTIVES**

Description: Includes productivity of the unit (the quantity and quality of output) and accomplishing unit goals.

Manager Rating:

Manager Comments:

Created By: Template 12/27/2021 7:29AM

# Lesson 1: Requesting Nominations Continued

4. Select the **Add Participants** hyperlink.

The screenshot displays the 'informs' Performance Process interface. The left sidebar shows a navigation menu with 'Manager Self-Service' and 'Performance Process'. The main content area is titled 'MDC-Prof/Supervisory Review ME' and 'Nominate Participants - Add Nominees'. A user profile for Michelle Lazo is shown with a dropdown menu for 'Actions'. Below this, a table lists nomination details:

Job Title	Human Resources Manager	Manager	Dena Kelly
Document Type	MDC-Prof/Supervisory Review ME	Period	02/08/2021 - 02/06/2022
Template	Employee Performance Eval	Document ID	52353
Status	In Progress	Due Date	02/06/2022

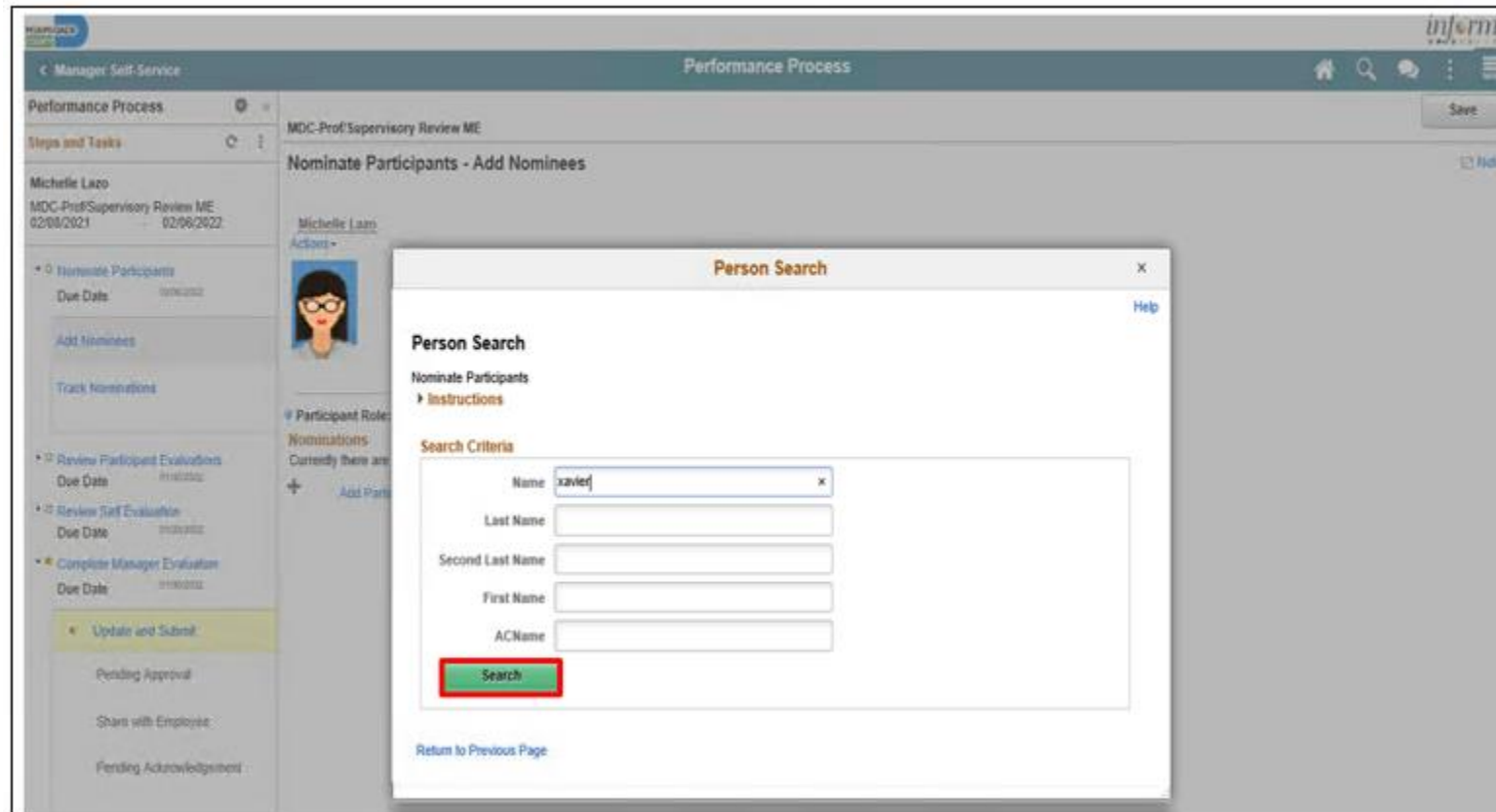
Below the table, it indicates 'Participant Role: Participant' with a 'Minimum Required: 0' and 'Maximum Available: 2'. A 'Nominations' section states 'Currently there are no nominees in your nomination list.' and features a red-bordered '+ Add Participant' button.

The left sidebar contains the following items:

- Performance Process (Settings icon)
- Steps and Tasks (Refresh icon)
- Michelle Lazo (MDC-Prof/Supervisory Review ME, 02/08/2021 - 02/06/2022)
- Nominate Participants (Due Date: 02/06/2022)
  - Add Nominees (highlighted)
  - Track Nominations
- Review Participant Evaluations (Due Date: 01/06/2022)
- Review Self Evaluation (Due Date: 01/23/2022)

# Lesson 1: Requesting Nominations Continued

5. Input applicable Search Criteria.
6. Select the **Search** button.



The screenshot displays the 'informs' Performance Process interface. The main window is titled 'Performance Process' and shows a 'NOMINATE PARTICIPANTS - ADD NOMINEES' section. A 'Person Search' modal window is open, allowing users to search for nominees. The modal contains the following fields and options:

- Name:** A dropdown menu with 'xavier' selected.
- Last Name:** An empty text input field.
- Second Last Name:** An empty text input field.
- First Name:** An empty text input field.
- ACName:** An empty text input field.
- Search:** A green button with a red border, highlighted by a red box.

Below the search fields, there is a 'Return to Previous Page' link. The background interface shows a sidebar with navigation options like 'NOMINATE PARTICIPANTS', 'TRACK NOMINATIONS', and 'REVIEW PARTICIPANT EVALUATIONS'. The user profile for Michelle Lazo is visible in the top right of the sidebar.

# Lesson 1: Requesting Nominations Continued

7. Select the checkbox beside the applicable search result.
8. Select the nominee and then the **OK** button.

The screenshot shows the 'Manager Self-Service' interface with a 'Person Search' dialog box open. The dialog box displays a list of search results with checkboxes next to names. The 'OK' button is highlighted with a red box.

Search Results
<input checked="" type="checkbox"/> Xavier Alvarez
<input type="checkbox"/> Xavier Bercy
<input type="checkbox"/> Xavier Boone
<input type="checkbox"/> Xavier Borbolla
<input type="checkbox"/> Xavier Bussiere
<input type="checkbox"/> Xavier Caraballo
<input type="checkbox"/> Xavier Dixon
<input type="checkbox"/> Xavier Giraldo
<input type="checkbox"/> Xavier Guerra
<input type="checkbox"/> Xavier Hopkins
<input type="checkbox"/> Xavier Jackson
<input type="checkbox"/> Xavier Lightbourn
<input type="checkbox"/> Xavier McIntyre
<input type="checkbox"/> Xavier Ondaro
<input type="checkbox"/> Xavier Peresrego

OK  
Return to Previous Page

# Lesson 1: Requesting Nominations Continued

9. Select the Submit Nominations button.

The screenshot displays the 'informs' Manager Self-Service interface for the 'Performance Process'. The main content area is titled 'MDC-Prof/Supervisory Review ME' and 'Nominate Participants - Add Nominees'. A 'Submit Nominations' button is highlighted in red. The interface shows a list of nominations with the following details:

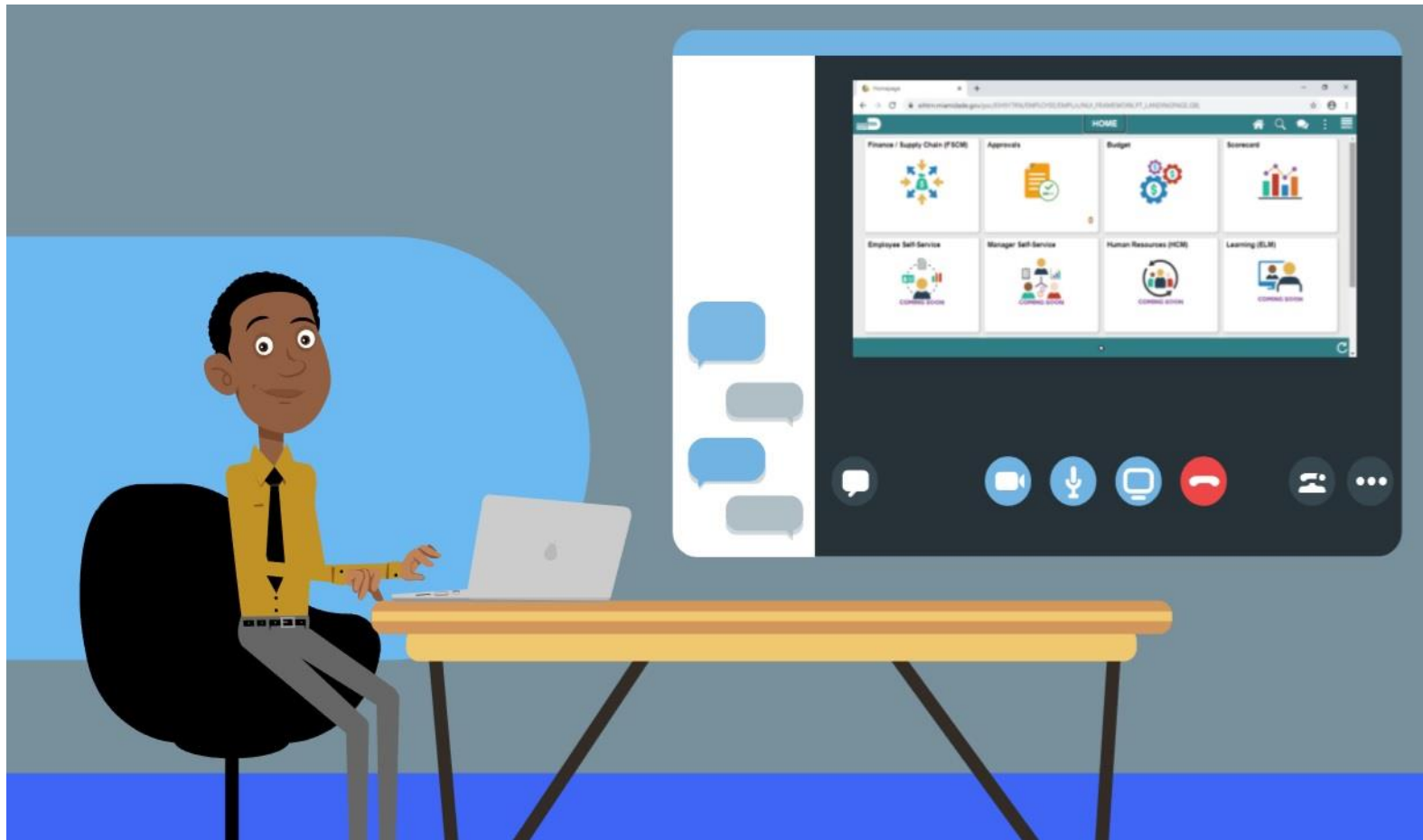
Nominee	Delete
Xavier Alvarez	

Additional details visible in the interface include: Michelle Lazo (Manager), Job Title: Human Resources Manager, Document Type: MDC-Prof/Supervisory Review ME, Template: Employee Performance Eval, Status: In Progress, and a 'Participant Role: Participant' selection. A table below shows 'Minimum Required: 0' and 'Maximum Available: 3'.

10. Select the **Confirm** button.



# Lesson 1: Activities and Exercises



# Lesson 1: Lesson Summary

- Having completed the requesting nominations lesson, the user should be able to
  - Nominate participants to provide additional feedback on an employee's evaluation

# Lesson 2: Preparing an Employee's Evaluation as a Manager

- At the conclusion of this lesson, users will be able to:
  - Prepare an Employee's Evaluation as a Manager

# Lesson 2: Key Terms

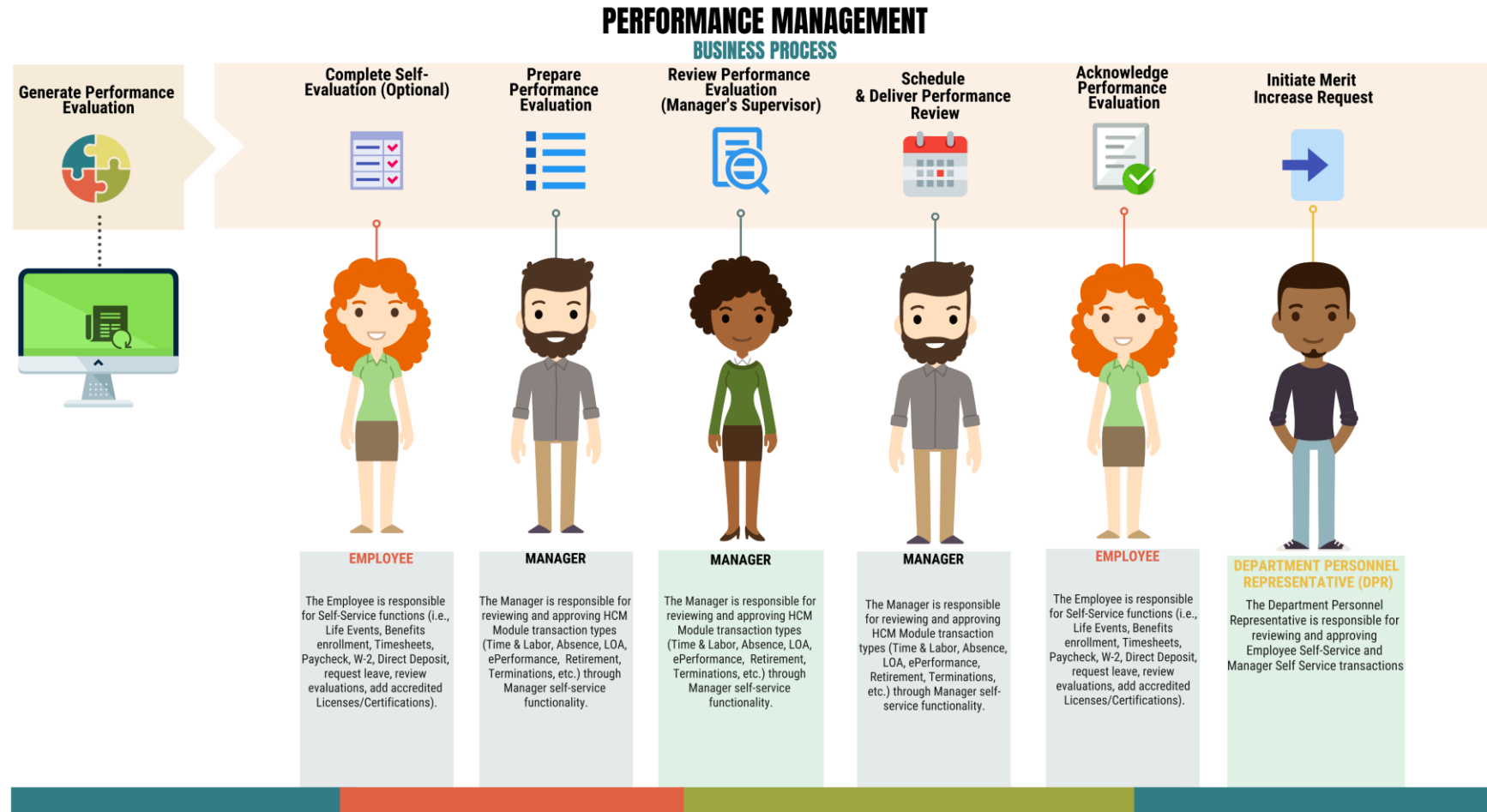
Term	Definition
<b>Individual Rating</b>	The score that a Manager uses to rate Employees in a particular performance evaluation Category.
<b>Merit Increase</b>	A salary increase that Employees may be eligible for if their Overall Rating is “Satisfactory” (or above) and no Individual rating is “Need Improvement” (or lower).
<b>Overall Rating</b>	The average of the Individual Ratings on an Employee’s performance evaluation.
<b>Performance Evaluation</b>	A annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for Merit Increases.
<b>Self-Evaluation</b>	A self-rating performed by Employees prior to their Performance Evaluation.
<b>Document Status</b>	The current state of the Evaluation - Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started, or Review Held.
<b>Document Type</b>	Document Review Type is the type of formatted Performance Evaluation document being generated in INFORMS. Document Review Type varies based upon which Employee will be reviewed. “MDC-Annual Review EE” is one example of an INFORMS Document Review Type.

# Lesson 2: Preparing an Employee's Evaluation as a Manager

Managers must complete an annual performance evaluation for their employees in Miami-Dade County. Managers must rate their employees on four or seven objectives. An Overall Rating is generated by INFORMS and is based on an average of the individual ratings. The rating model for both the individual objectives and the overall objective is the same:

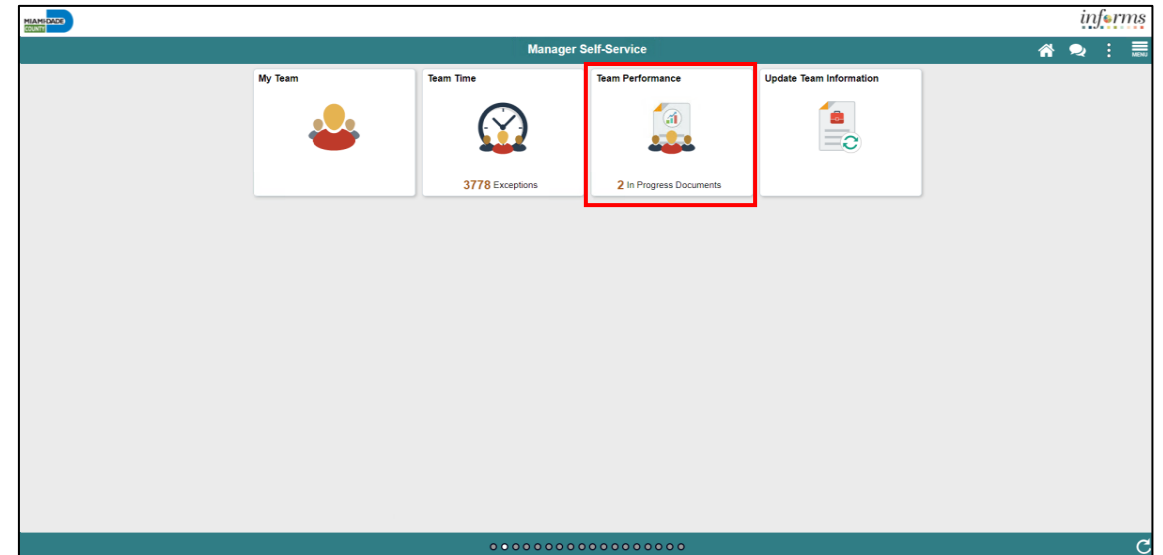
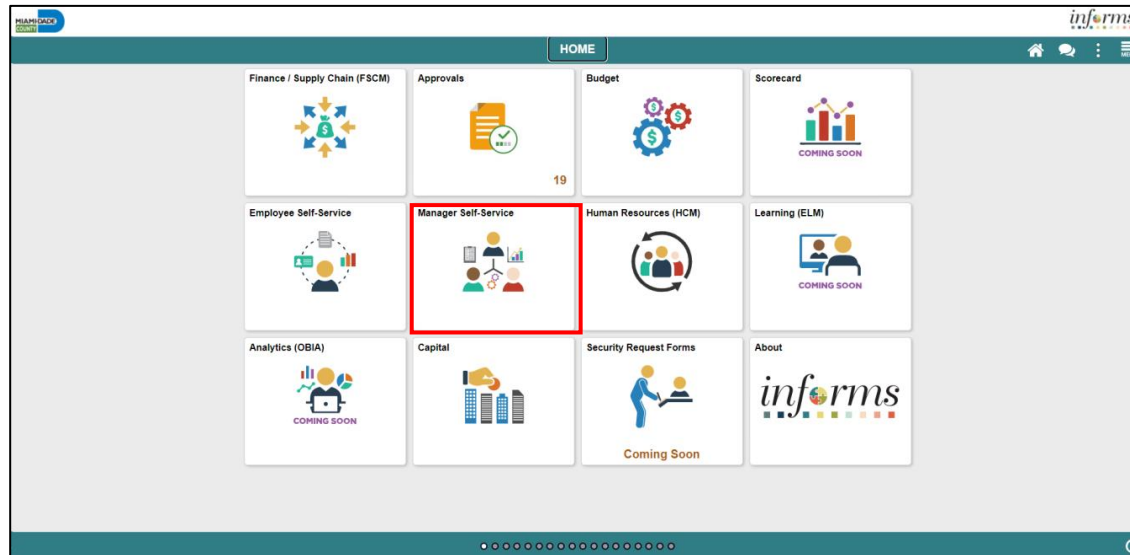
1. Unsatisfactory
2. Needs Improvement
3. Satisfactory
4. Above Satisfactory
5. Outstanding
- X. Does not apply

# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued



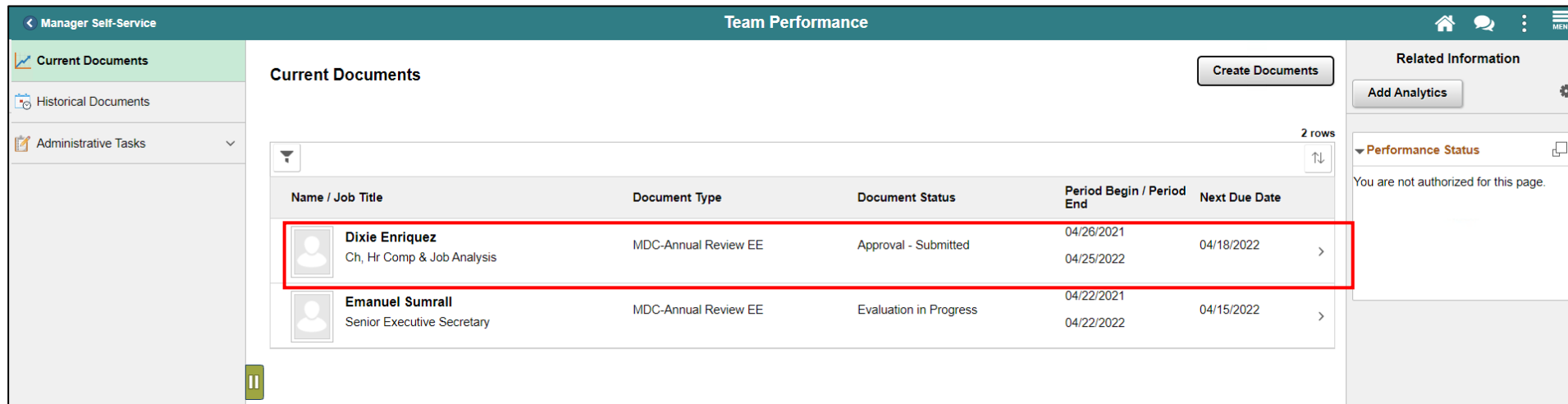
# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

Navigate to **Manager Self-Service > Team Performance**





# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

1. Select the **Employee Name** under **Current Documents**.



The screenshot shows the 'Manager Self-Service' interface for 'Team Performance'. On the left, there is a navigation menu with 'Current Documents' selected. The main area displays a table of 'Current Documents' with 2 rows. The first row is highlighted with a red box. The table has columns for Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. A 'Create Documents' button is visible in the top right of the table area. On the right side, there is a 'Related Information' section with an 'Add Analytics' button and a 'Performance Status' section that displays a message: 'You are not authorized for this page.'

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 <b>Dixie Enriquez</b> Ch, Hr Comp & Job Analysis	MDC-Annual Review EE	Approval - Submitted	04/26/2021 04/25/2022	04/18/2022
 <b>Emanuel Sumrall</b> Senior Executive Secretary	MDC-Annual Review EE	Evaluation in Progress	04/22/2021 04/22/2022	04/15/2022

**Note:** The Current Performance Documents Page displays documents that are currently listed as “In Progress”.

**Note:** at this point you can nominate a secondary preparer to review and comment on the employee's performance.



# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

2. Select the applicable **Manager Rating** from the dropdown.
3. Input the applicable details within the **Manager Comments** field.
4. Select the **Spell Check** option, if desired.

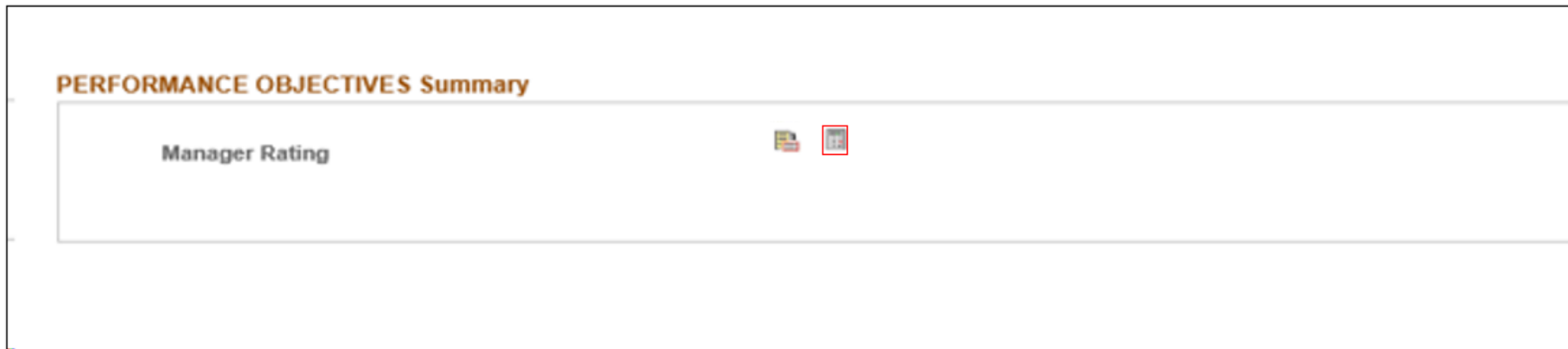
The screenshot displays the 'Performance Process' interface for 'MDC-Annual Review EE'. The main content area shows a 'Manager Evaluation - Pending Approval' form. The form is divided into sections, with 'Section 1 - PERFORMANCE OBJECTIVES' expanded. Under this section, there is a 'QUANTITY OF WORK' sub-section. The 'Description' field contains the text 'Includes amount of work performed.' Below this, there are two rows of data: 'Manager Rating' set to '4 - Above Satisfactory' and 'Avg Rating' set to '4 - Above Satisfactory' with a value of '4.00'. The 'Manager Comments' field is currently empty and is highlighted with a red rectangular box. At the bottom of the form, there is a metadata section showing 'Created By: Template' and 'Last Modified By: Dionte Sowers' with their respective timestamps.

**Note:** Please follow steps 2-4 for each sub-section within section one.

# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

## 5. Complete **Section 2 - Overall Summary Section**

**Note:** The Overall Score is an automatic calculation of the employee's overall performance score.



The screenshot displays a section of a performance evaluation form titled "PERFORMANCE OBJECTIVES Summary". Below the title is a large rectangular input area. On the left side of this area, the text "Manager Rating" is visible. To the right of the text, there are two small icons: a document icon and a calendar icon. The entire form area is enclosed in a thin black border.

# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

6. Input Manager Comments in the Section 3 - Ways an Employee Can Improve section.

The screenshot displays the 'Performance Process' web application interface. The top navigation bar includes the Miami-Dade County logo, the title 'Performance Process', and utility icons for home, chat, and menu. The main content area is titled 'MDC-Annual Review EE' and 'Manager Evaluation - Pending Approval'. It shows a summary of the evaluation for Dixie Enriquez, including the dates (04/26/2021 - 04/25/2022), an overview link, and a list of steps: 'Nominate Participants' (Due Date: 04/18/2022), 'Review Participant Evaluations' (Due Date: 04/18/2022), 'Review Self Evaluation' (Due Date: 04/11/2022), and 'Complete Manager Evaluation' (Due Date: 04/18/2022). The 'Complete Manager Evaluation' step is expanded, showing options: 'Update and Submit', 'Pending Approval' (highlighted), and 'Share with Employee'. The main content area also displays 'Manager Rating 4 - Above Satisfactory' and 'Avg Rating 4 - Above Satisfactory 4.00'. Below this, there is a section titled 'Section 3 - Ways employee can improve' with a sub-section 'Ways employee can improve Summary'. A text input field labeled 'Manager Comments' with the placeholder text 'enter manager comments here.' is highlighted with a red rectangular box.

# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

7. Review details input by the employee within **Section 4 – Employee Comments / Accomplishments** and insert Manager comments.

**Note:** To add any applicable attachments, select the Add Attachment hyperlink.

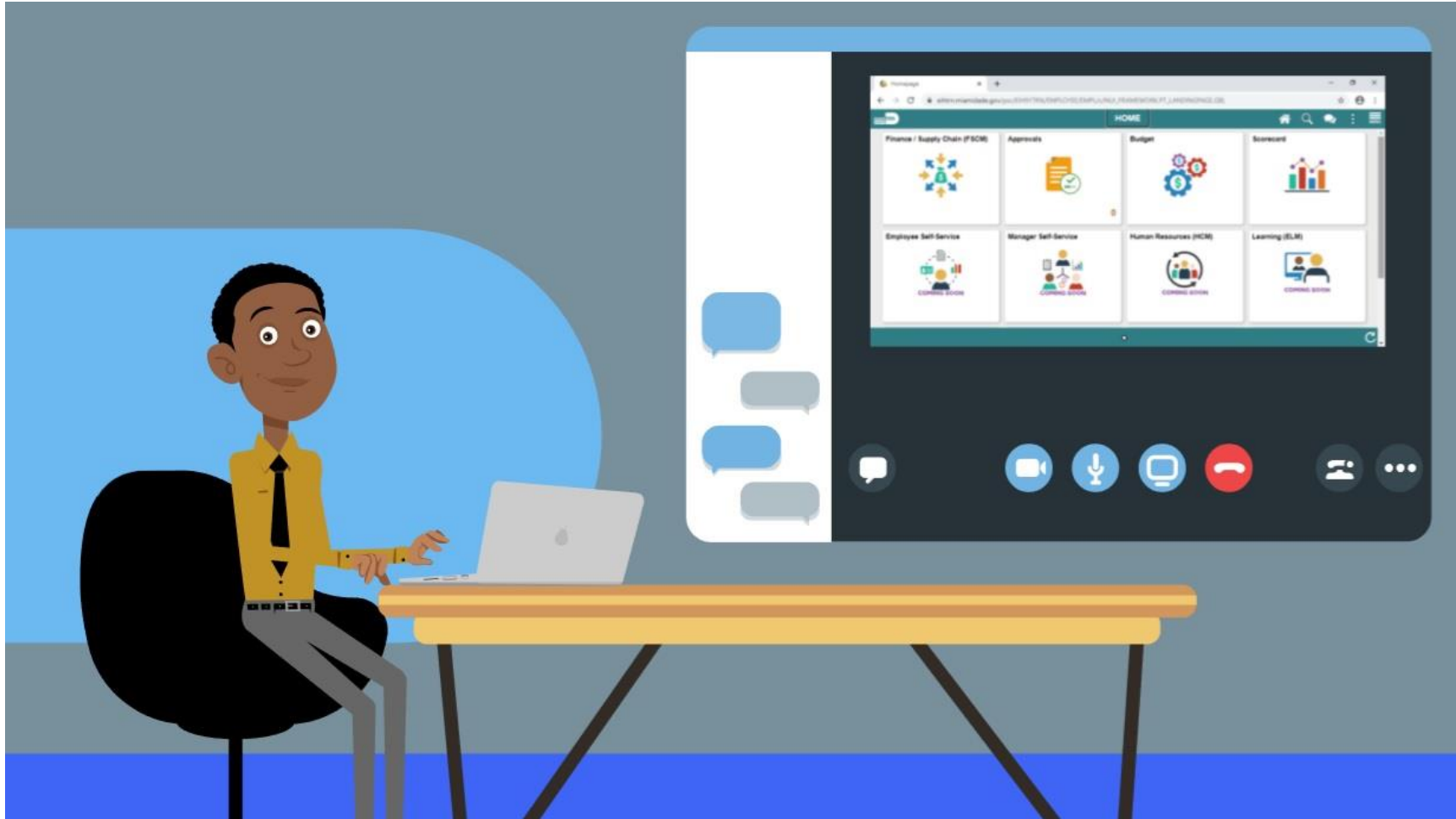
The screenshot displays the 'Performance Process' interface for 'MDC-Annual Review EE'. The left sidebar shows the 'Steps and Tasks' list, with 'Complete Manager Evaluation' (Due Date: 04/19/2022) selected and 'Pending Approval' highlighted. The main content area shows 'Manager Evaluation - Pending Approval' with 'Section 4 - Employee Comments / Accomplishments' expanded. Under 'Employee Comments', there is a 'Description' field for 'Manager Comments' (currently empty) and a list of 'Employee Comments' containing one item: 'I have learned a lot during this past year and I am looking forward to further professional growth over next year.' The bottom of the screen shows 'Created By: Template' and 'Last Modified By: Template' with a timestamp of '04/25/2022 12:44PM'.

# Lesson 2: Preparing an Employee's Evaluation as a Manager Continued

8. Select the **Save** button.
9. Select the **Submit for Approval** button. The evaluation gets routed to the Reviewer. Finally, select the **Confirm Button**.

The screenshot shows the 'Performance Process' interface for 'MDC-Annual Review EE'. The main heading is 'Manager Evaluation - Update and Submit'. In the top right corner, the 'Save' and 'Submit for Approval' buttons are highlighted with red boxes. The interface includes a sidebar with navigation options like 'Nominate Participants', 'Review Participant Evaluations', and 'Complete Manager Evaluation'. The main content area shows employee details for 'Luis Zamora', including job title 'His Specialist', manager 'Dena Kelly', and document ID '5222'. Below this, there is a section for 'PERFORMANCE OBJECTIVES' with a 'QUANTITY OF WORK' subsection. The 'Manager Rating' is set to '5 - Outstanding'. A 'Manager Comments' text area is visible at the bottom.

# Lesson 2: Activities and Exercises



# Lesson 2: Lesson Summary

- Having completed this lesson, the user should be able to
  - Prepare an Employee's Evaluation as a Manager

# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)

- At the conclusion of this lesson, users will be able to:
  - Review an Employee's Evaluation (Manager's Supervisor)



# Lesson 3: Key Terms

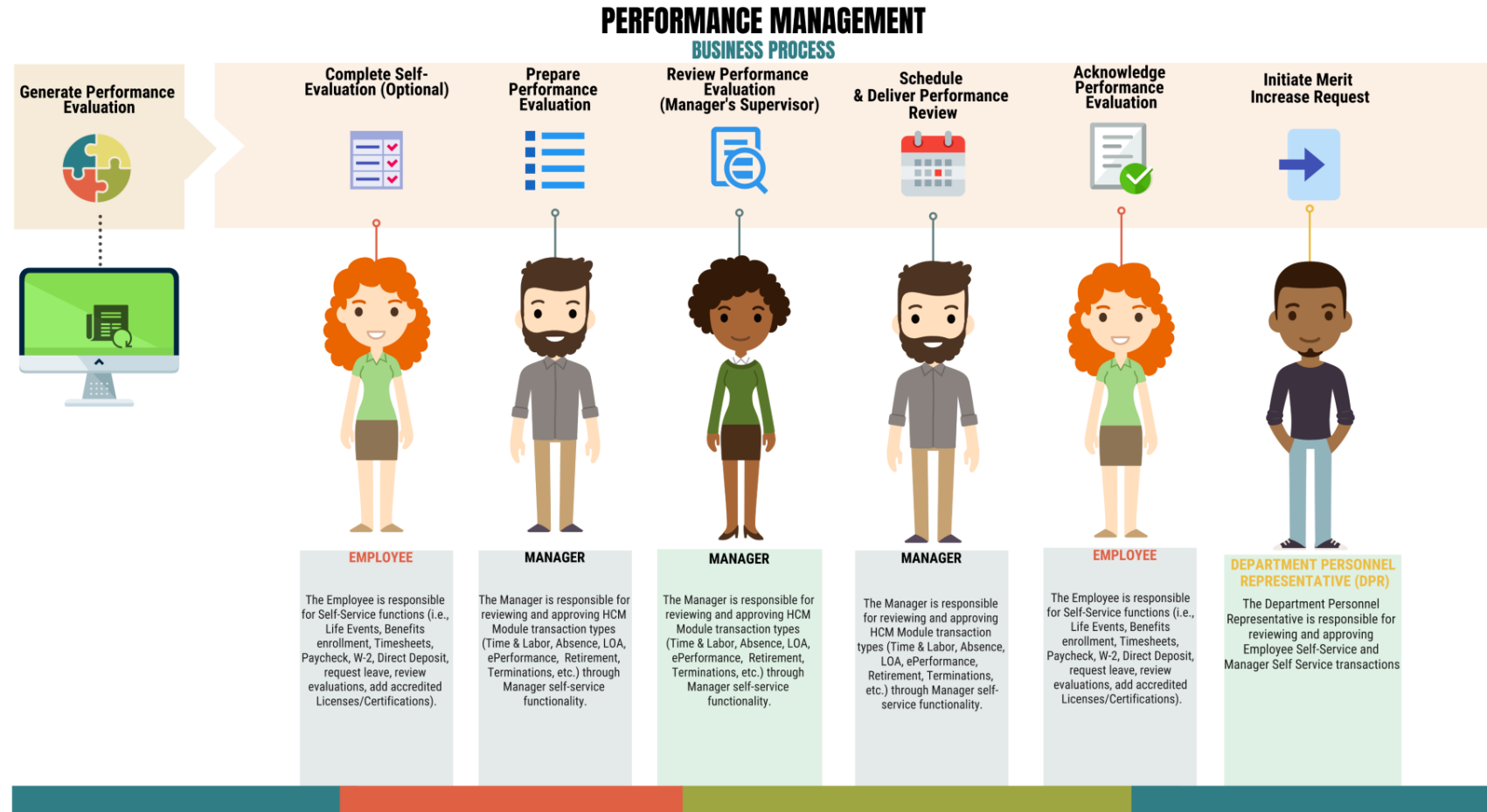
Term	Definition
<b>Performance Evaluation</b>	A annual evaluation conducted by a Manager that rates the Employee in various individual Categories and is the basis for Merit Increases.

# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

- INFORMS will provide an email notification, with an embedded link to access the document, for the Reviewer to review and approve the performance evaluation. Reviewers can also view the document in their approvals tile in INFORMS.

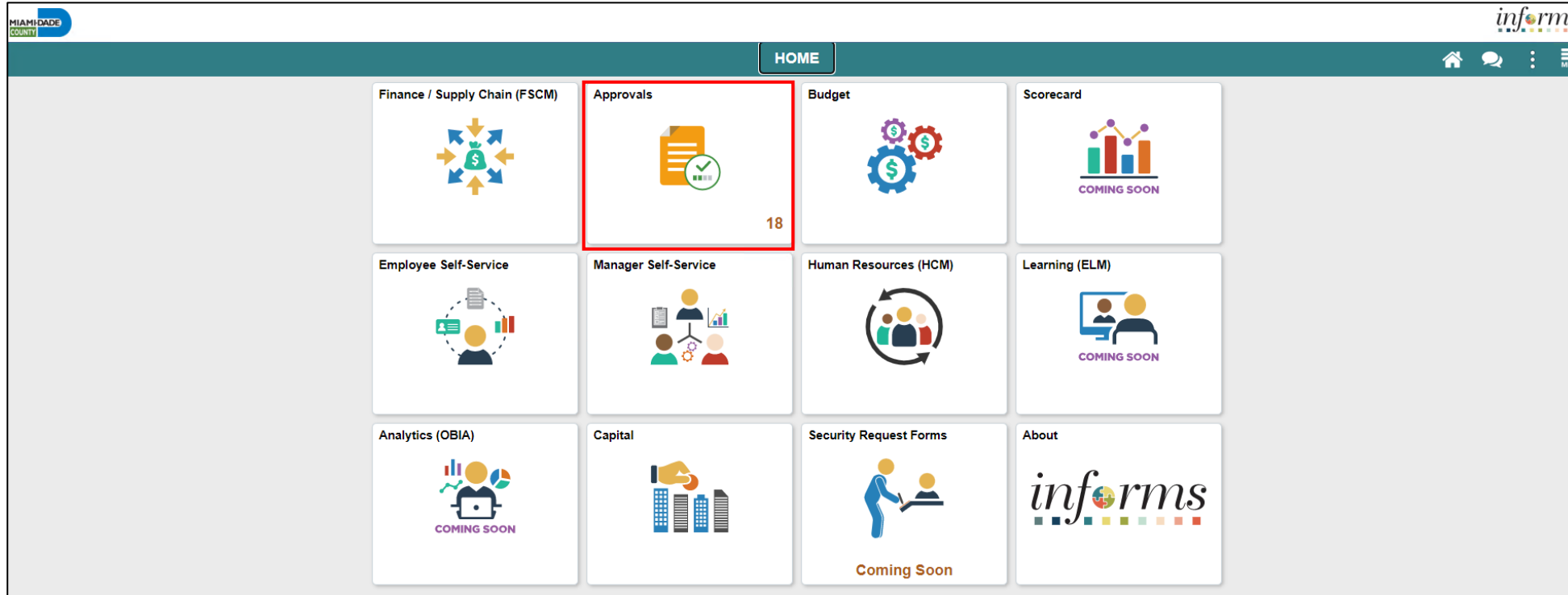
**Note:** The Reviewer cannot edit the evaluation. The Reviewer can only provide comments when approving or denying the evaluation. INFORMS will display a confirmation message once the Reviewer has approved the Performance Evaluation then route an email notification to the Manager.

# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued



# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

## Navigate to Approvals



# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

1. Select the **Performance** pane. Note, performance evaluation documents that have been prepared by the Rater and require approval by the Reviewer are displayed.
2. Select the **Performance** option for your employee and then select your employee.

The screenshot shows the 'Pending Approvals' section of the informs system. The left sidebar has a 'Performance' option highlighted with a red box. The main area displays a table with one row, also highlighted with a red box. The table contains the following information:

All			1 row
Performance Les Chatham	4 - Above Satisfactory 01/01/2021 To 01/01/2022	Routed 02/23/2022	>

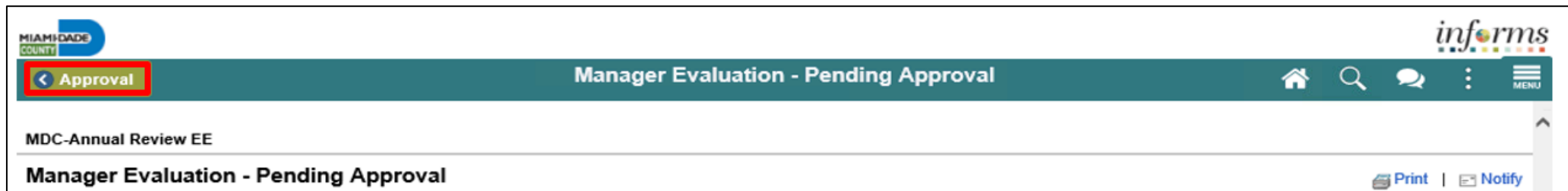
# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

3. Select the **View Performance Detail** link.

The screenshot shows the 'informs' web application interface. At the top, there is a navigation bar with 'Pending Approvals' and 'Performance' tabs. Below this, the user 'Les Chatham' is identified as an 'Accountant 2'. There are 'Approve' and 'Deny' buttons. The 'Performance Summary' section displays the following information: Document Type: MDC-Annual Review EE; Manager: Emerald Ritchie; Period Begin Date: 01/01/21; Period End Date: 01/01/22; Rating: 4 - Above Satisfactory. A red box highlights the 'View Performance Detail' link. Below the summary, there is an 'Approver Comments' section with a red-bordered text area and an 'Approval Chain' dropdown menu.

# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor)Continued

4. Review all sections of the performance evaluation document and check to see if the document contains any attachments.
5. Once the Reviewer has reviewed the entire performance evaluation, select the Approval button on the top left corner of the screen.



# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

6. Select the **Approver Comments** field and enter desired information. Once desired information is entered, click on **Approve** button.

**Note** the reviewer also has the option to deny in which case the reviewer would provide the reasons for denial. At this point the document will route back to the Rater (employee's manager) to be amended and the Rater will then have to resubmit the evaluation to the Reviewer.

The screenshot displays the 'Performance' review interface. At the top, it shows 'Pending Approvals' for 'Les Chatham, Accountant 2'. The 'Performance Summary' section includes the following information: Document Type: MDC-Annual Review EE; Manager: Emerald Ritchie; Period Begin Date: 01/01/21; Period End Date: 01/01/22; Rating: 4 - Above Satisfactory. A red box highlights the 'Approver Comments' text area, which is currently empty. Below it is an 'Approval Chain' dropdown menu. The top right of the interface has 'Approve' and 'Deny' buttons.



# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

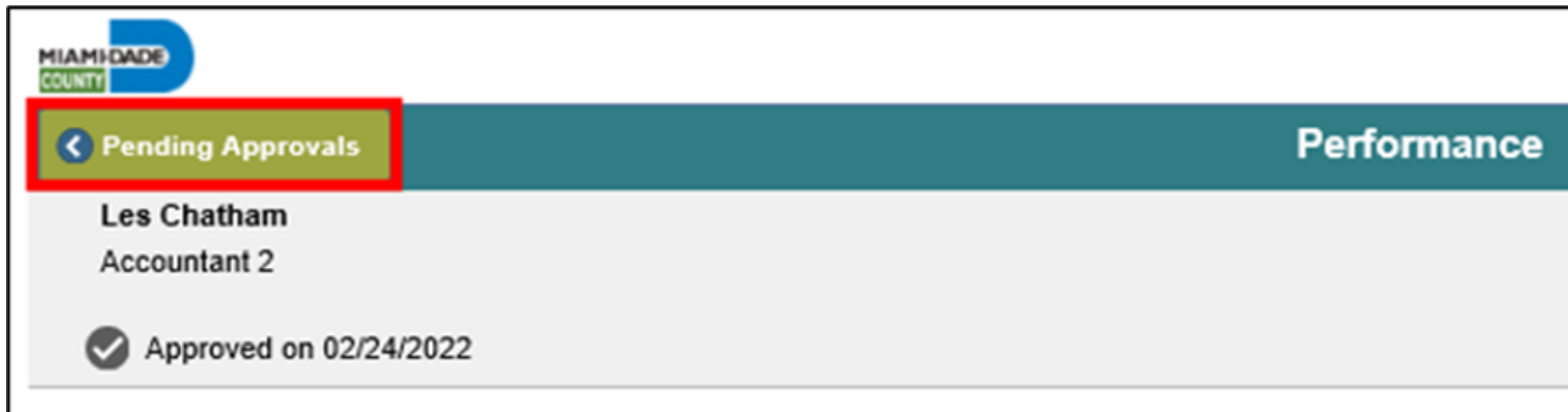
7. Select the **Submit** button.



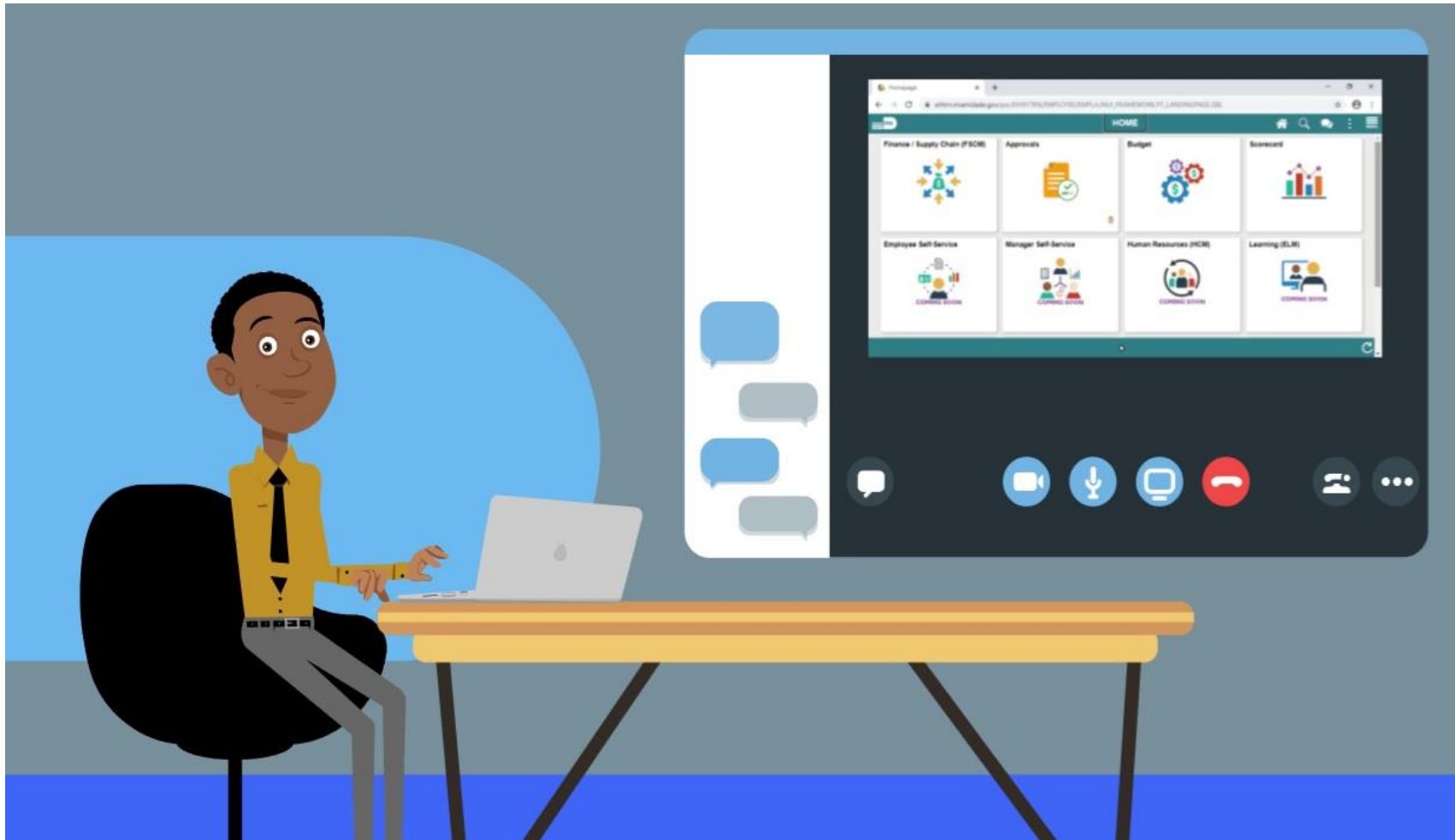
The screenshot shows a dialog box with a light gray header. On the left is a 'Cancel' button, in the center is the word 'Approve' in orange, and on the right is a green 'Submit' button with a red dashed border. Below the header, the text reads 'You are about to approve this request.' followed by 'Approver Comments'. A text input field contains the text 'I approve the evaluation for Les Chatham for this evaluation peri' and has a vertical scrollbar on the right.

# Lesson 3: Reviewing an Employee's Evaluation (Manager's Supervisor) Continued

8. Select **Pending Approvals** to check if there are any more approvals pending.



# Lesson 3: Activities and Exercises



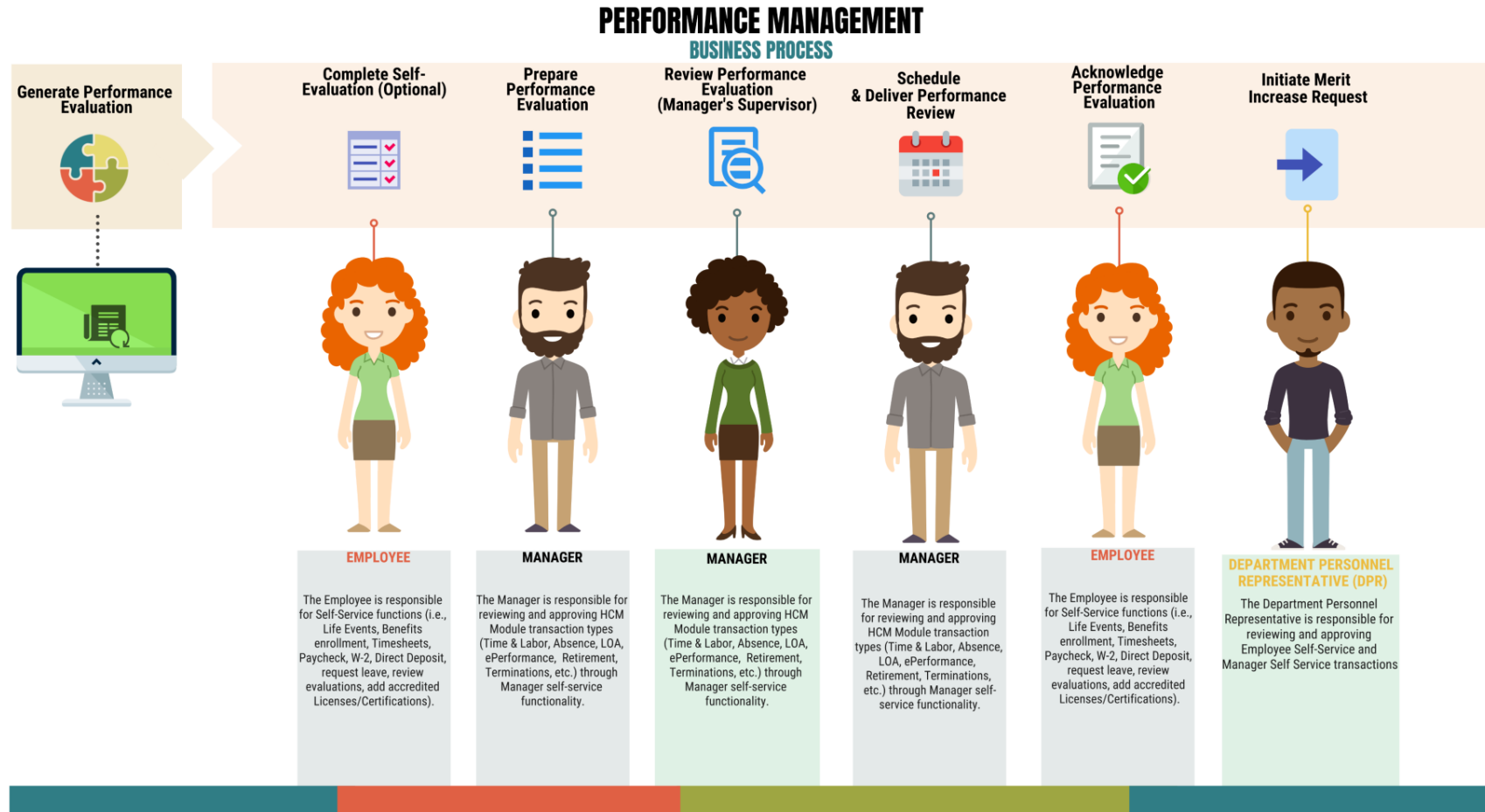
# Lesson 3: Lesson Summary

- Having completed this lesson, the user should be able to
  - Review an Employee's Evaluation (Manager's Supervisor)

# Lesson 4: Share an Evaluation with Employee as Manager

- At the conclusion of this lesson, users will be able to:
  - Share an Evaluation with Employee as Manager

# Lesson 4: Share an Evaluation with Employee as Manager Continued



# Lesson 4: Share an Evaluation with Employee as Manager Continued

Navigate to **Manager Self-Service > Team Performance**

The image displays two screenshots of the informs system interface. The left screenshot shows the 'HOME' dashboard with a grid of tiles. The 'Manager Self-Service' tile is highlighted with a red box. The right screenshot shows the 'Manager Self-Service' dashboard with a grid of tiles. The 'Team Performance' tile is highlighted with a red box.

**HOME Dashboard Tiles:**

- Finance / Supply Chain (FSCM)
- Approvals (19)
- Budget
- Scorecard (COMING SOON)
- Employee Self-Service
- Manager Self-Service**
- Human Resources (HCM)
- Learning (ELM) (COMING SOON)
- Analytics (OBIA) (COMING SOON)
- Capital
- Security Request Forms (Coming Soon)
- About informs


**Manager Self-Service Dashboard Tiles:**

- My Team
- Team Time (3778 Exceptions)
- Team Performance (2 In Progress Documents)**
- Update Team Information

# Lesson 4: Share an Evaluation with Employee as Manager Continued

1. Select **Current Document** and then **MDC-Annual Review EE**.

The screenshot displays the 'informs' Manager Self-Service interface. The left sidebar contains a menu with 'Current Documents' highlighted. The main content area shows a 'Current Documents' section with a 'Create Documents' button. A table below lists one document entry, which is highlighted with a red box.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
 Les Chatham Accountant 2	MDC-Annual Review EE	Approval - Approved	01/01/2021 01/01/2022	12/25/2021 >



# Lesson 4: Share an Evaluation with Employee as Manager Continued

## 2. Select **Share with Employee**.

The screenshot displays the 'informs' Performance Process interface. The main header shows 'Team Performance' and 'Performance Process'. The left sidebar lists 'Steps and Tasks' for 'Les Chatham' (MDC-Annual Review EE, 01/01/2021 - 01/01/2022), including 'Nominate Participants', 'Review Participant Evaluations', 'Review Self Evaluation', and 'Complete Manager Evaluation'. The 'Complete Manager Evaluation' step is expanded, showing 'Update and Submit', 'Pending Approval', and 'Share with Employee' (highlighted in red). The main content area shows 'MDC-Annual Review EE' for 'Les Chatham' with a 'Manager Evaluation - Update and Share' action. A 'Share with Employee' button is highlighted in red in the top right corner. Below the action, there is a table of details:

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	Approval - Approved	Due Date	12/25/2021

Below the table, there is an 'Employee Data' section:

Employee ID	00319256
Department	FN06020000 ACCOUNTING SECTION

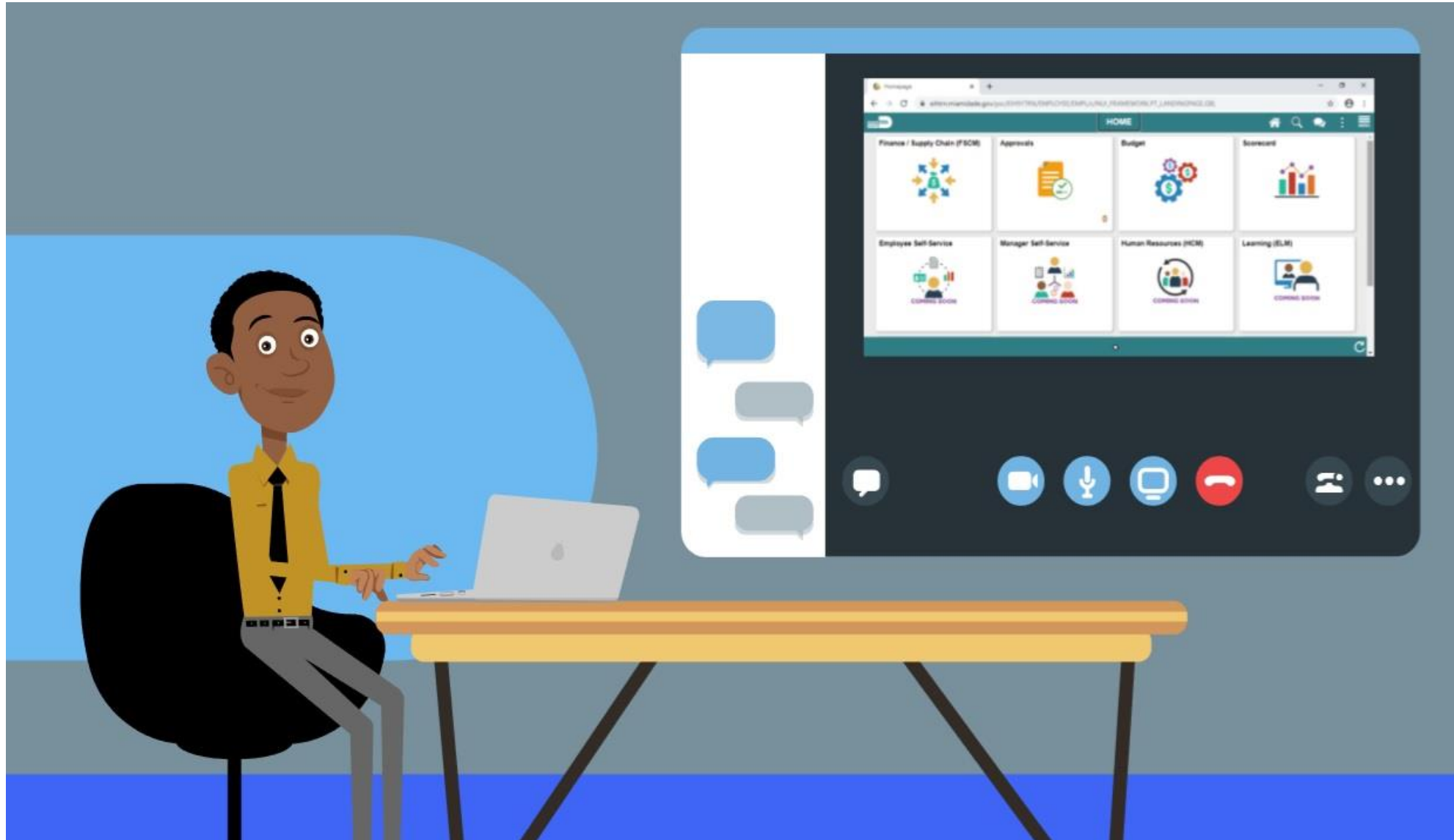
At the bottom, there are options to 'Expand All', 'Collapse All', and 'View Graphical Rating'.

# Lesson 4: Share an Evaluation with Employee as Manager Continued

3. Select the **Confirm** button. This will complete the process. The evaluation will close out (edits can no longer be made) and move to the employee's historical folder as well as the manager's historical folder.



# Lesson 4: Activities and Exercises



# Lesson 4: Lesson Summary

- Having completed this lesson, the user should be able to
  - Share an Evaluation with Employee as Manager

# Module 2: ePerformance Summary

## Module Topics

Module Introduction

**Lesson 1:** Requesting Nominations

**Lesson 2:** Preparing an Employee's Evaluation as a Manager

**Lesson 3:** Reviewing an Employee's Evaluations (Manager's Supervisor)

**Lesson 4:** Share Evaluation with Employee as Manager

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Course Content Summary Continued

Congratulations on completing the overview of Manager Self-Service ePerformance Management. You now understand how to:

- Request Nominations
- Prepare an Evaluation as a Manager
- Review an Employee Evaluation as a Manager's Supervisor
- Share the Evaluation with your Employee as a Manager

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

# Additional Training and Job Aids

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

- **INFORMS Training Webpage:**

- <https://www.miamidade.gov/global/humanresources/training/informs.page>

- **User Productivity Kits (Available on the INFORMS Training Webpage):**

- Request Nominations
  - Prepare an Employee's Evaluation as a Manager
  - Review an Employee's Evaluation as a Manager's Supervisor
  - Share the Evaluation with the Employee as a Manager

For additional information, be sure to visit:

- [Miamiade.gov/informs](https://www.miamidade.gov/informs)





# CONGRATULATIONS

Congratulations on successfully completing the **Manager Self-Service** course!

**MSS 205 – Manager Self Service - ePerformance Management  
(Employee Performance Evaluation)**