Course ID: MSS 206
Course: Manager Self Service - Updating Team Information

Ground Rules
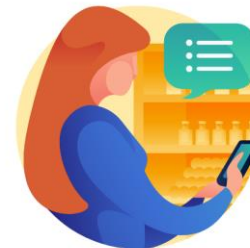
Be on time

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	This course provides a comprehensive review of the Updating Team Information processes.
	This course consists of the following modules:
	Module 1: Course Introduction
	• Module 1: Course Introduction
	• Module 2: Updating Team Information
	o Discipline Management
	o Retirement and Voluntary Separation
	o Involuntary Separation
	o Requesting leave on behalf of Employee
	• Module 3: Course Summary
Training Audiences	• Manager • DPR • Employees
Prerequisites	• ERP 101 - Introductory Course - Overview of INFORMS • ERP 102 - INFORMS Navigation, Reporting, and Online Help

MIAMI-DADE COUNTY

Course Overview

Other Related Courses	• MSS 204 - Manager Self Service – Time Management • MSS 205 - Manager Self Service - ePerformance Management (Employee Performance Evaluation)
Estimated Duration	• 5 Hours and 30 Minutes

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 <u>and</u> end of class
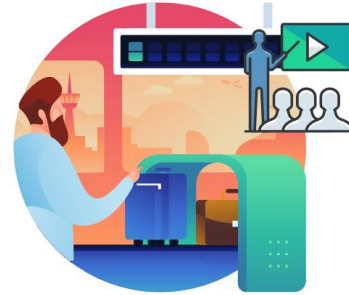
Please turn off your cell phones and refrain from checking email and the Internet while in class

Actively participate in class

Take Breaks at scheduled times

Ask questions; this is your time to learn

Be back from Breaks on time

MIAMI-DADE COUNTY

Learning Objectives

- Record and manage disciplinary records of employees

- Record and submit retirement and resignations of employees

- Record and submit involuntary separation of employees

- Approve an employee's retirement request

- Approve an employee's resignation request

- Request leave on behalf of Employee

- Request a return from leave on behalf of Employee

MIAMI-DADE
COUNTY

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
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.

Navigation

1. Login to INFORMS and select **Manager Self-Service** from the home landing page below:
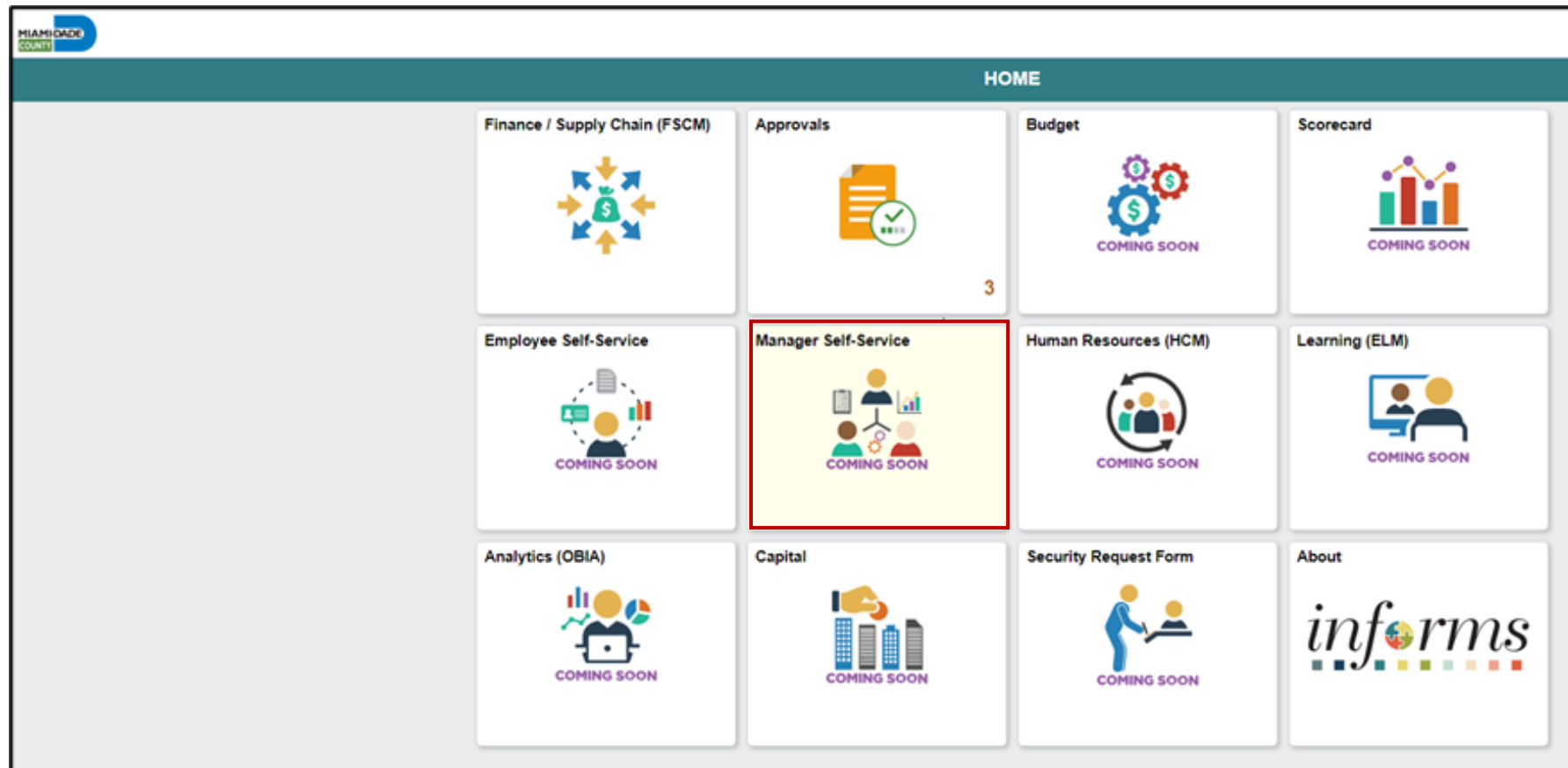
Purpose and Benefits to Business Process

The purpose and benefits of Manager Self 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 Manager Self-Service allows Managers to manage disciplinary actions, initiate and submit retirement and voluntary separation and involuntary separation/termination requests, and request leave on behalf of Employee.

MANAGER SELF SERVICE (LEAVE OF ABSENCE)
BUSINESS PROCESS

Initiate transaction (Termination/Leave of Absence) → Approve/Deny Transaction → Job Data is Updated → (If Termination) Confirm/Review payout if Termination → (If LOA) Finalize Leave of Absence (LOA) benefit

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.

PAYROLL CENTRAL ADMINISTRATOR
The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.

BENEFITS ADMINISTRATOR SPECIALIST
The Benefits Administrator Specialist is responsible for processing transactions.

Introduction to Activities and Exercises

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

Training
Activities
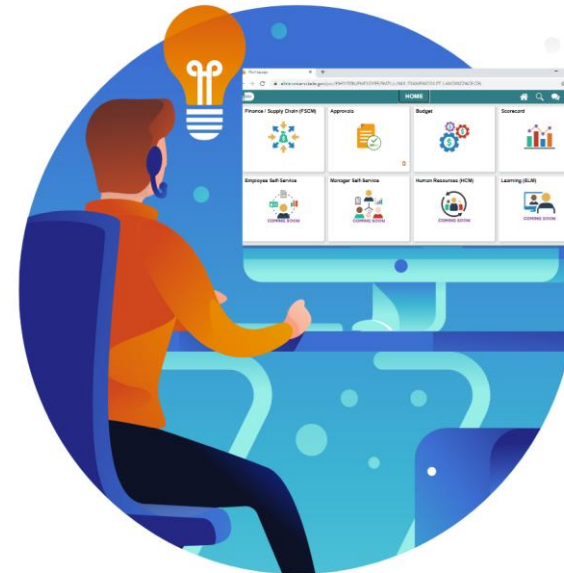
Training
Exercises

Module 1: Course Introduction Summary

Module Topics
Course Administration and Logistics
Learning Objectives
Roles and Responsibilities
Navigation
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
Lesson 3: Involuntary Separation
Lesson 4: Requesting Leave on behalf of Employee

Lesson 1: Discipline Management

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

Lesson 1: Discipline Management Continued

Lesson 1: Key Terms

Term	Definition
Department Personnel Representative (DPR)	The Department Personnel Representative is responsible for reviewing and approving self-service 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 made.
Disciplinary Resolution	Recommended and final action that the County will take to resolve the violation made.
Violations	Policy or departmental based offenses made by the employee.

Lesson 1: Discipline Management

<u>Record a Disciplinary Action and Action Taken</u>

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

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.
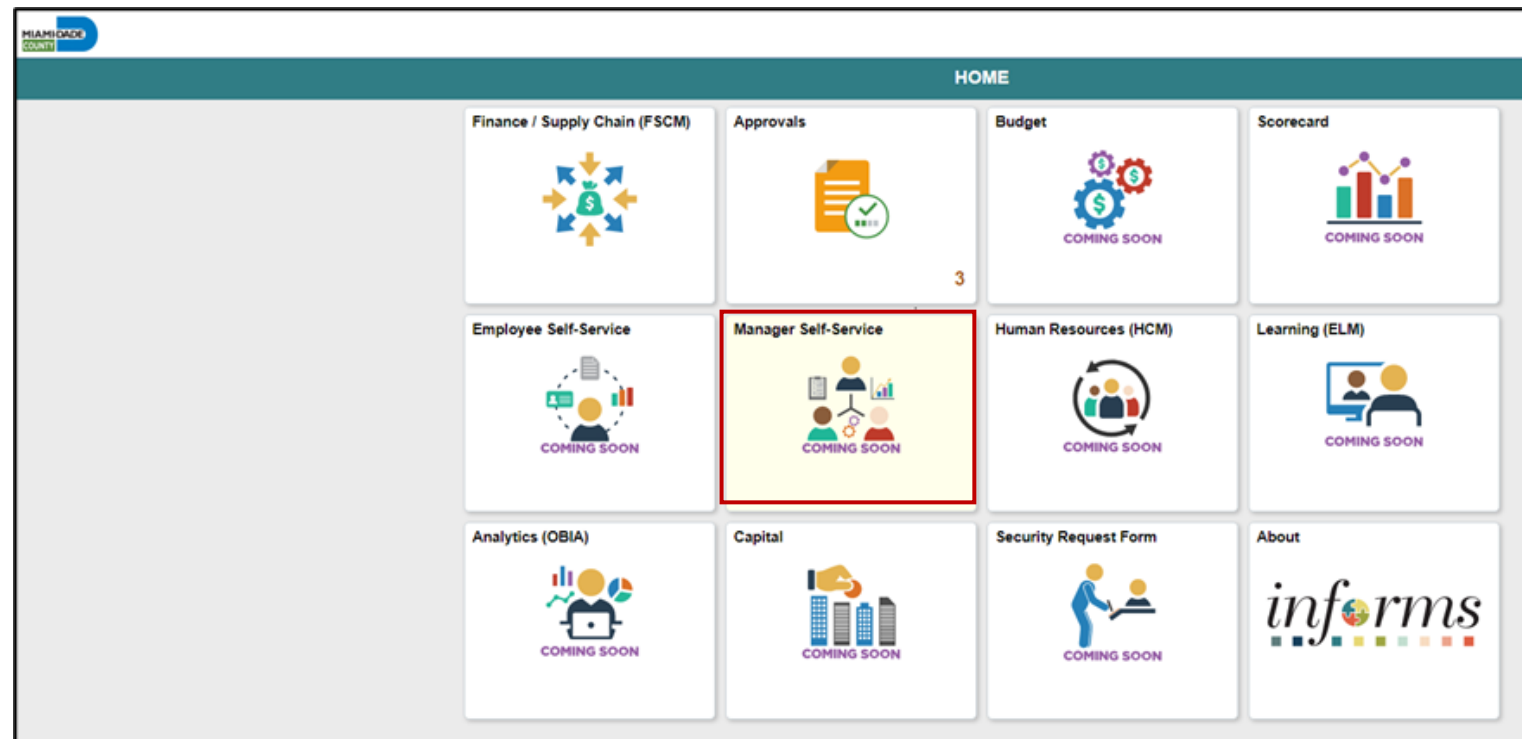
Lesson 1: Discipline Management Continued

2. Select **Record Administrative Actions**.

Lesson 1: Discipline Management Continued

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

Lesson 1: Discipline Management Continued

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

Lesson 1: Discipline Management Continued

- 5. Make sure to provide 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.

Lesson 1: Discipline Management Continued

- **Facts:** Provide the facts related to the **Discipline Offense**.

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

- **Administrative/Implementing Orders:** Search and select **Administrative/ Implementing Orders** from the **Look Up** pop-up window.

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

Lesson 1: Discipline Management Continued

- Scroll down, and then select the **Action Taken** hyperlink.
Note: An **Action Taken** record is required to save a **Disciplinary Action** record.

Lesson 1: Discipline Management Continued

6. Make sure to provide 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 with whom the employee discussed the disciplinary action, or search and select it from the **Look Up** pop-up window.

7. Select **Save** to create the disciplinary record.
Note: A DAR number is created and a notification is sent to the DPR.
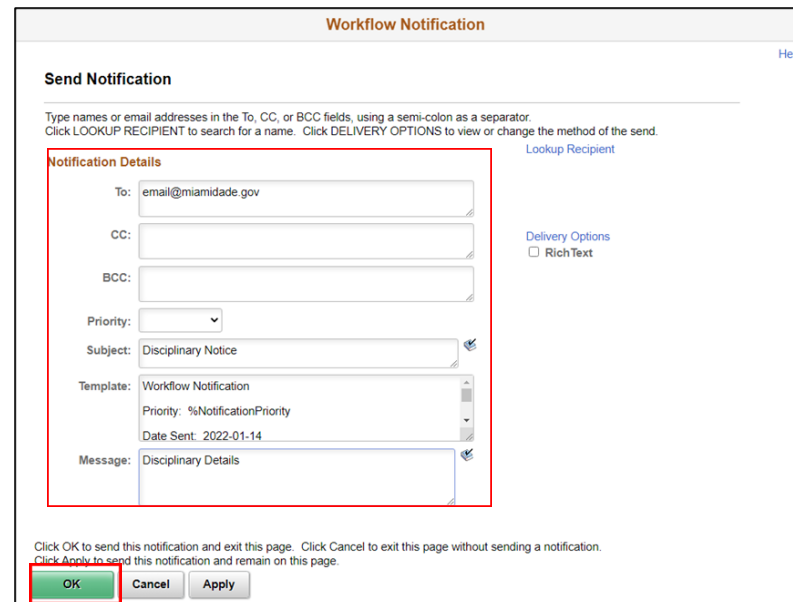
Lesson 1: Discipline Management Continued

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

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

Lesson 1: Activities and Exercises
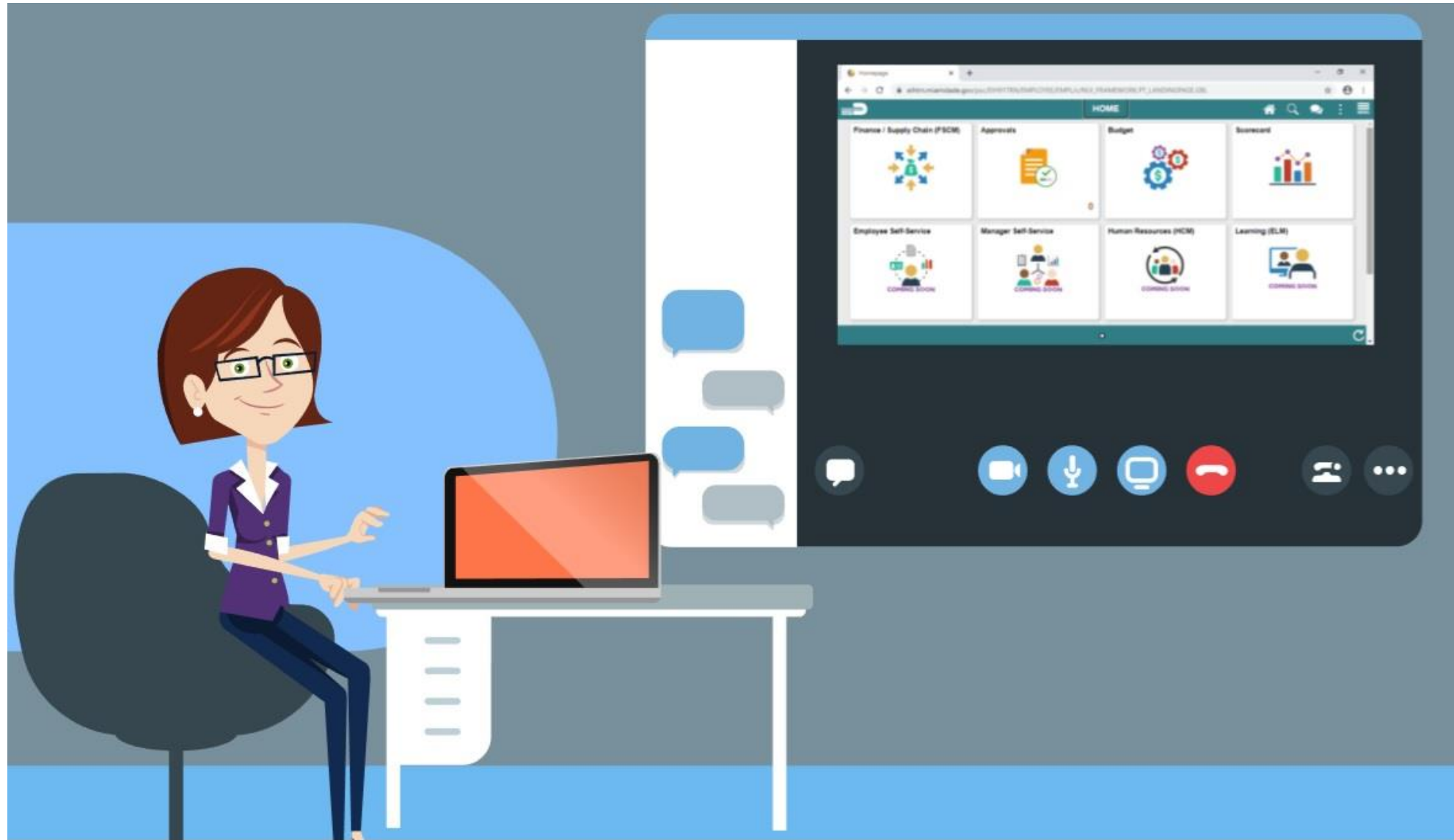
Lesson 1: Lesson Summary

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

- Submit a retirement request of behalf of the employee.

- Submit a resignation request on behalf of the employee.

- 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

Submission

Review

Final Review

Job Data 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.

SYSTEM INFORMS
The administrative process that is performed

Lesson 2: Key Terms

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

Lesson 2: Retirement and Voluntary Separation

File a Retirement on behalf of Employee

As a Manager, file for retirement in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.

Lesson 2: Retirement and Voluntary Separation Continued

2. Select **Update Team Information**.

Lesson 2: Retirement and Voluntary Separation Continued

3. Select **Retire Employee**.

Lesson 2: Retirement and Voluntary Separation Continued

4. Select an employee to retire.

Lesson 2: Retirement and Voluntary Separation Continued

5. Confirm that the **Reason** is **Retirement**, and then select **Next**.

Lesson 2: Retirement and Voluntary Separation Continued

6. Provide **Comments** as needed, and then select **Submit**.

Lesson 2: Retirement and Voluntary Separation

File a Resignation on behalf of Employee

As a Manager, file for resignation in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.

Lesson 2: Retirement and Voluntary Separation Continued

2. Select **Update Team Information**.

Lesson 2: Retirement and Voluntary Separation Continued

3. Select **Terminate Employee**.

Lesson 2: Retirement and Voluntary Separation Continued

4. Select an employee to resign.

Lesson 2: Retirement and Voluntary Separation Continued

5. Confirm that the **Reason** is **Voluntary Resignation**, and then select **Next**.

Lesson 2: Retirement and Voluntary Separation Continued

6. Provide **Comments** as needed, and then select **Submit**.

Lesson 2: Retirement and Voluntary Separation Continued

Approve Employee Retirement

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

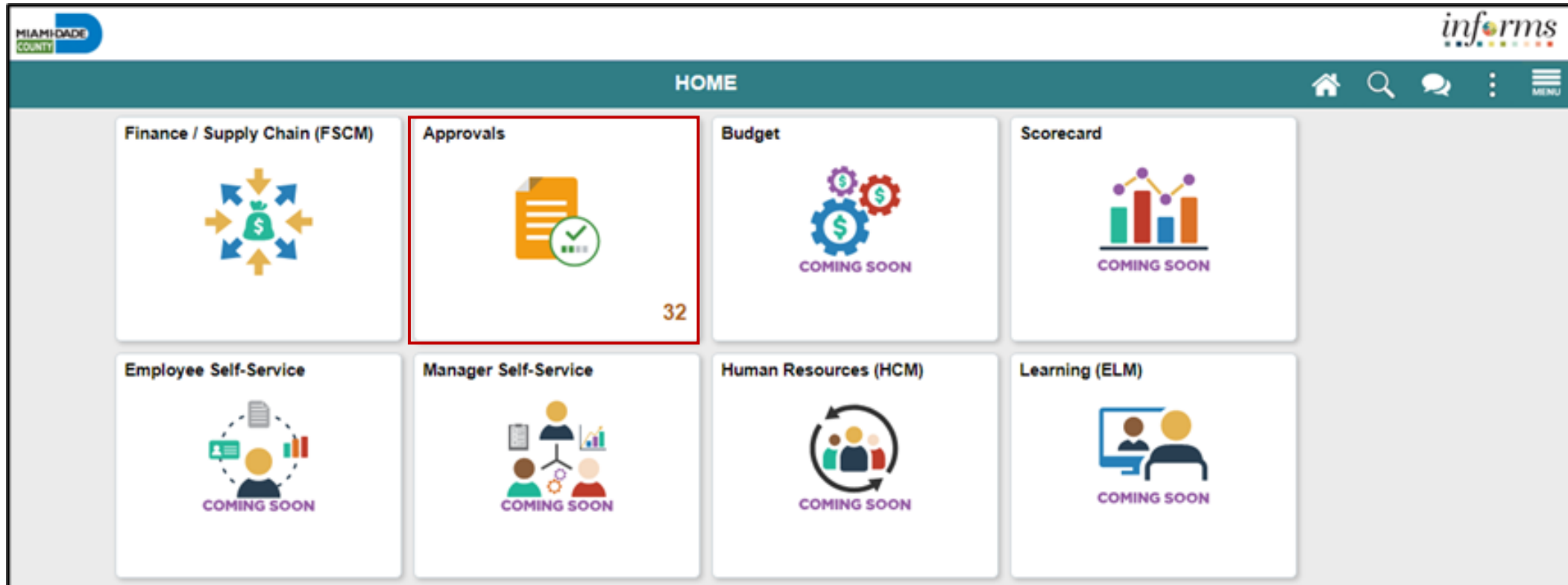1. Login to INFORMS, and then select **Approvals.**

Lesson 2: Retirement and Voluntary Separation Continued

2. Select **Retire Employee**.

Lesson 2: Retirement and Voluntary Separation Continued

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

Lesson 2: Retirement and Voluntary Separation Continued

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

Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

Note: Approver Comments can be changed as needed.

Lesson 2: Retirement and Voluntary Separation Continued

Approve Employee Voluntary Separation

As a Manager, approve the employee's retsignation record in INFORMS.

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

Lesson 2: Retirement and Voluntary Separation Continued

2. Select **Terminate Employee**.

Lesson 2: Retirement and Voluntary Separation Continued

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

Lesson 2: Retirement and Voluntary Separation Continued

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

Lesson 2: Retirement and Voluntary Separation Continued

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

Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

Note: Approver Comments can be changed as needed.

Lesson 2: Lesson Summary

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

- Submit a retirement request of behalf of the employee

- Submit a resignation request on behalf of the employee

- Approve an employee's retirement request

- Approve an employee's resignation request

Lesson 3: Involuntary Separation

- Submit a record for an employee's involuntary separation.

Lesson 3: Involuntary Separation

INVOLUNTARY SEPARATION APPROVALS
BUSINESS PROCESS

Initiate Request

Review Request

Processing Request

MANAGER

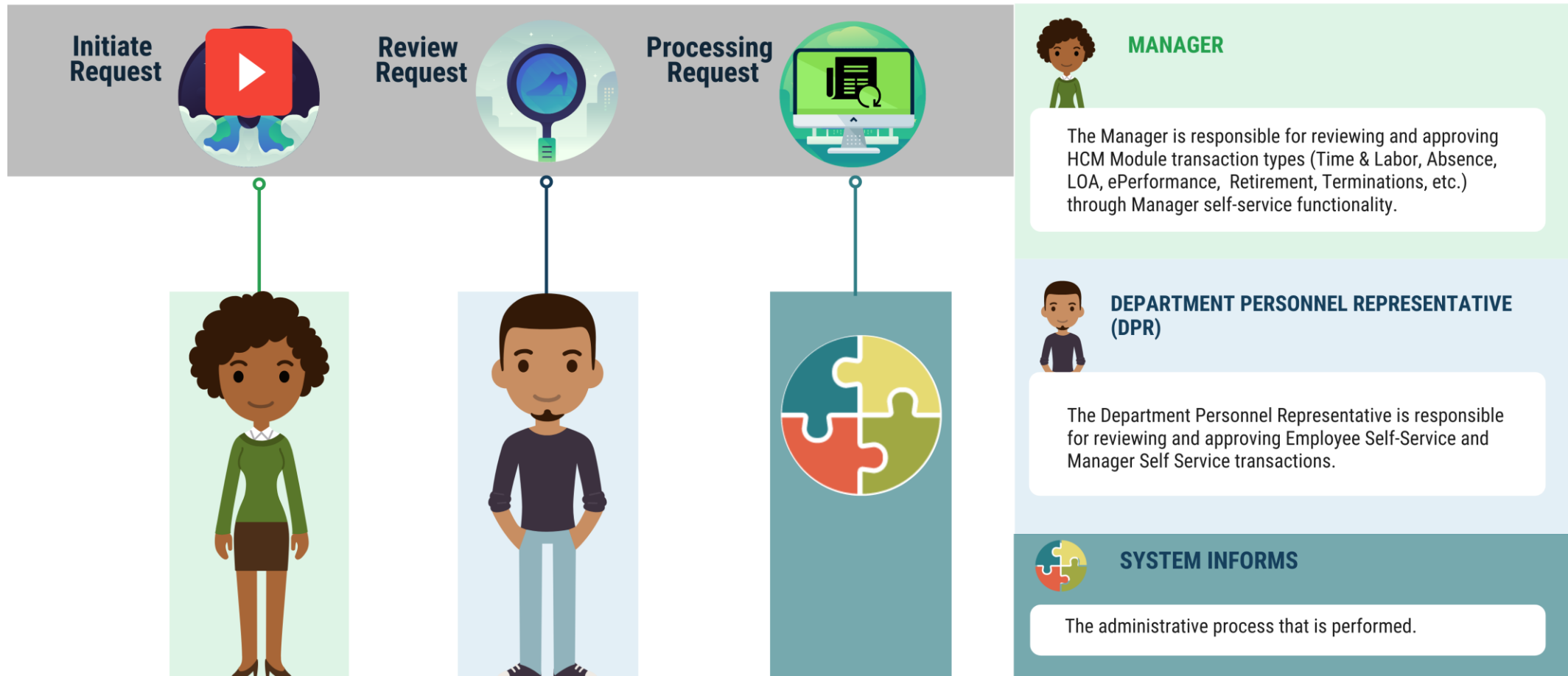The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.

DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)

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

SYSTEM INFORMS

The administrative process that is performed.
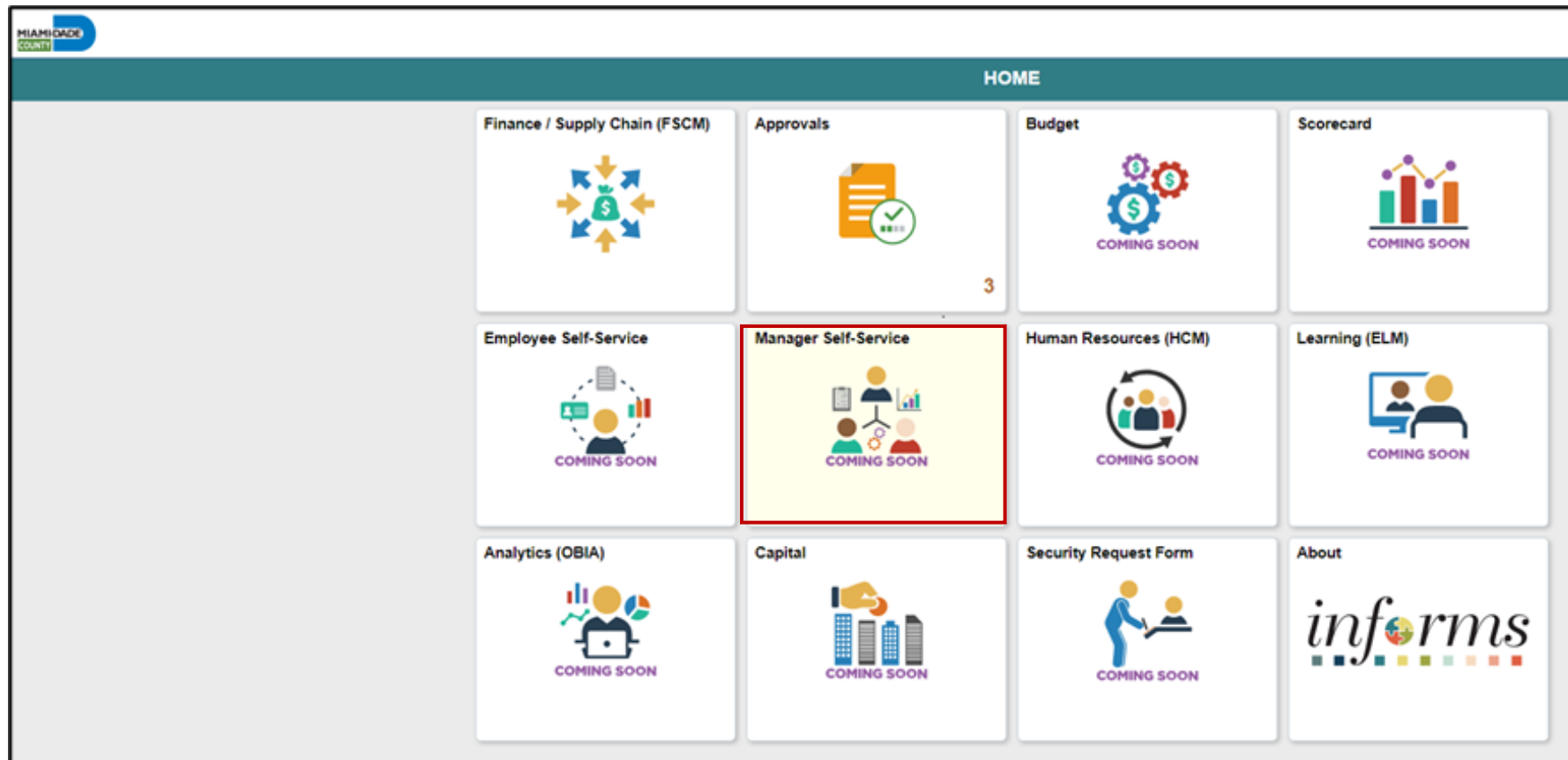
Lesson 3: Key Terms

Term	Definition
Involuntary Separation	Occurs when the department chooses to separate employees through reduction in force or by termination for conduct reasons.

Lesson 3: Involuntary Separation

As a Manager, file an involuntary separation for an employee in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.

Lesson 3: Involuntary Separation Continued

2. Select **Update Team Information**.

Lesson 3: Involuntary Separation Continued

3. Select **Terminate Employee**.

Lesson 3: Involuntary Separation Continued
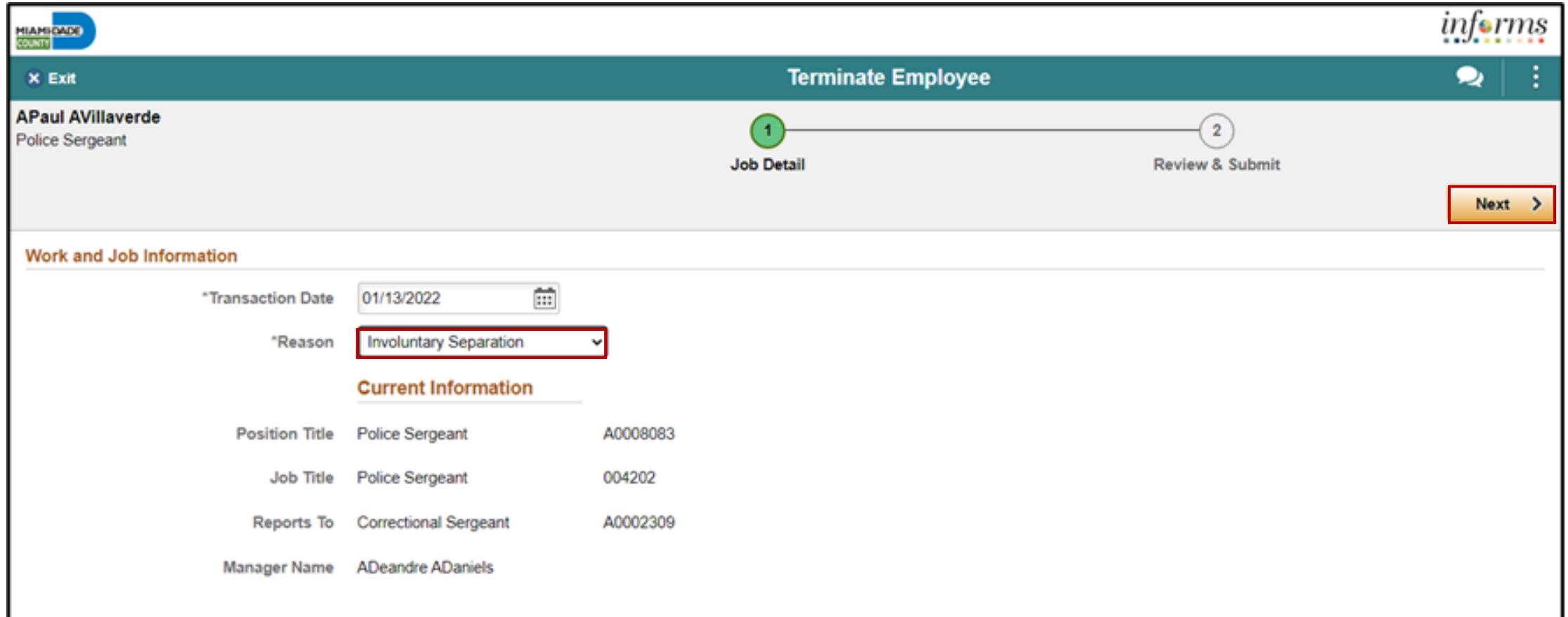
4. Select an employee to terminate.

Lesson 3: Involuntary Separation Continued

5. Select **Involuntary Separation** as the **Reason**, and then select **Next**.

Lesson 3: Involuntary Separation Continued

6. Provide **Comments** as needed, and then select **Submit**.

Lesson 3: Activities and Exercises
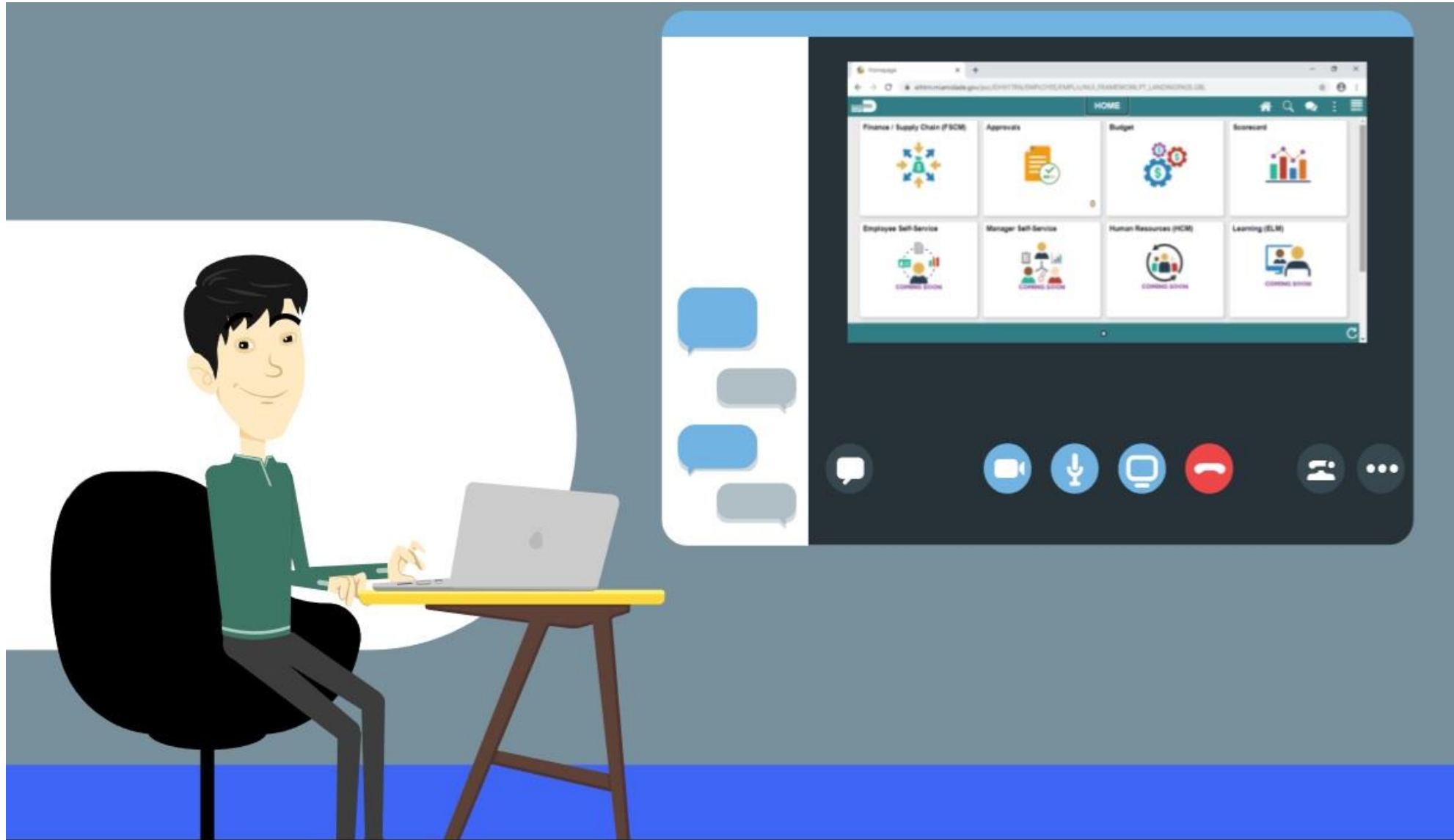
Lesson 3: Lesson Summary

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

• Submit a record for an employee's involuntary separation

Lesson 4: Requesting leave on behalf of Employee

At the conclusion of this lesson, you will be able to:
- Submit a record for an employee's leave of absence.
- Submit a record for an employee's return from leave.

Lesson 4: Requesting leave on behalf of Employee

<u>Leave of Absence</u>

INFORMS provides the Update Team Information page to enable Manager's to request a leave of absence on behalf of an employee.

MANAGER SELF SERVICE (LEAVE OF ABSENCE)
BUSINESS PROCESS

Initiate transaction (Termination/Leave of Absence)

Approve/Deny Transaction

Job Data is Updated

(If Termination) Confirm/Review payout if Termination
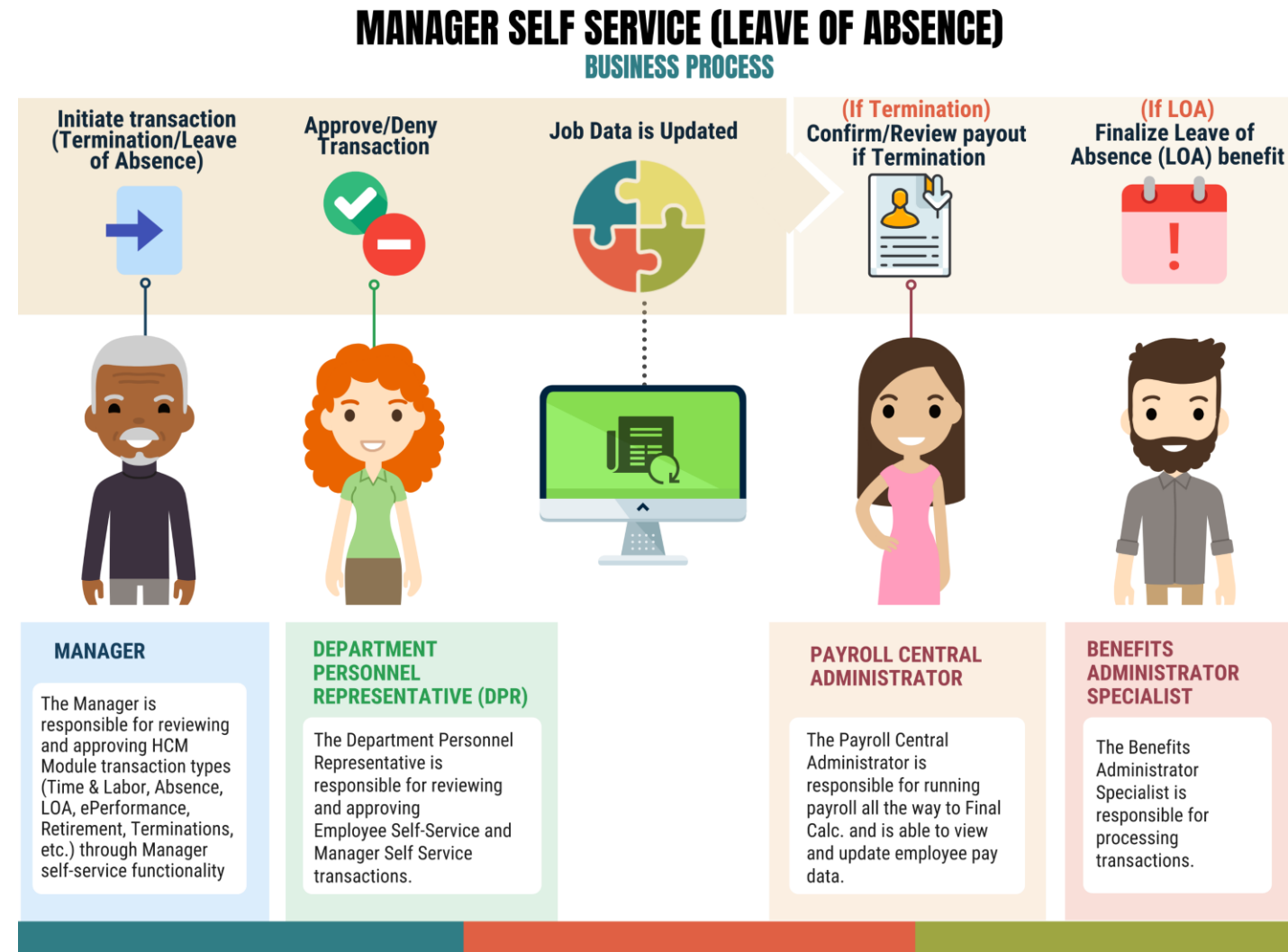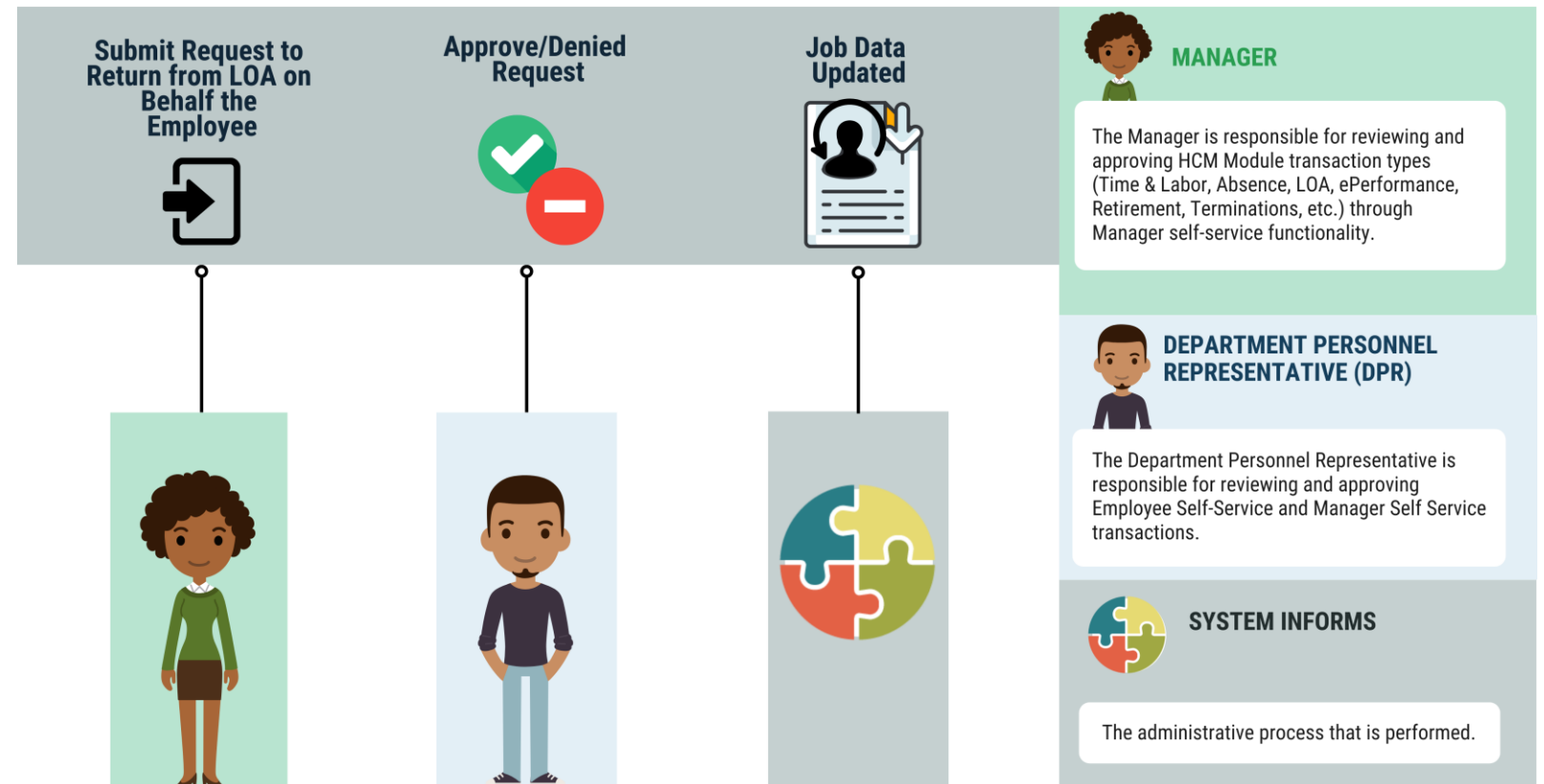
(If LOA) Finalize Leave of Absence (LOA) benefit

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.

PAYROLL CENTRAL ADMINISTRATOR

The Payroll Central Administrator is responsible for running payroll all the way to Final Calc. and is able to view and update employee pay data.

BENEFITS ADMINISTRATOR SPECIALIST

The Benefits Administrator Specialist is responsible for processing transactions.

Lesson 4: Requesting leave on behalf of Employee

<u>Return from Leave</u>

The Manager submits the request to return from LOA on behalf the employee, it routes to the DPR, and once is approved, the Job Data is updated in INFORMS.
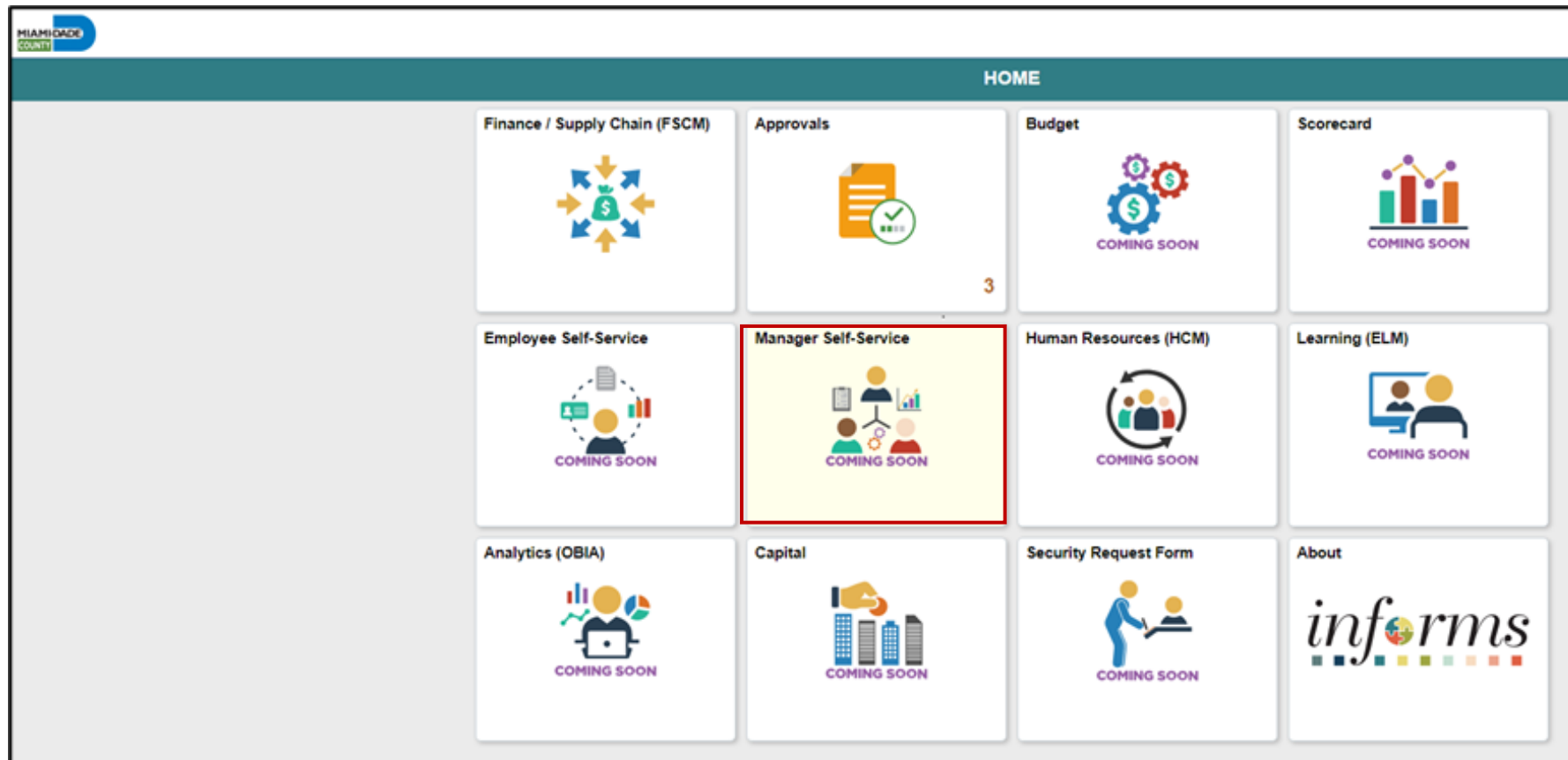
RETURN FROM LEAVE
BUSINESS PROCESS

Submit Request to Return from LOA on Behalf the Employee

Approve/Denied Request

Job Data Updated

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.

SYSTEM INFORMS

The administrative process that is performed.

Lesson 4: Key Terms

Term	Definition
LOA	Leave of Absence is a request for an employee to be absent from work for a period of time.

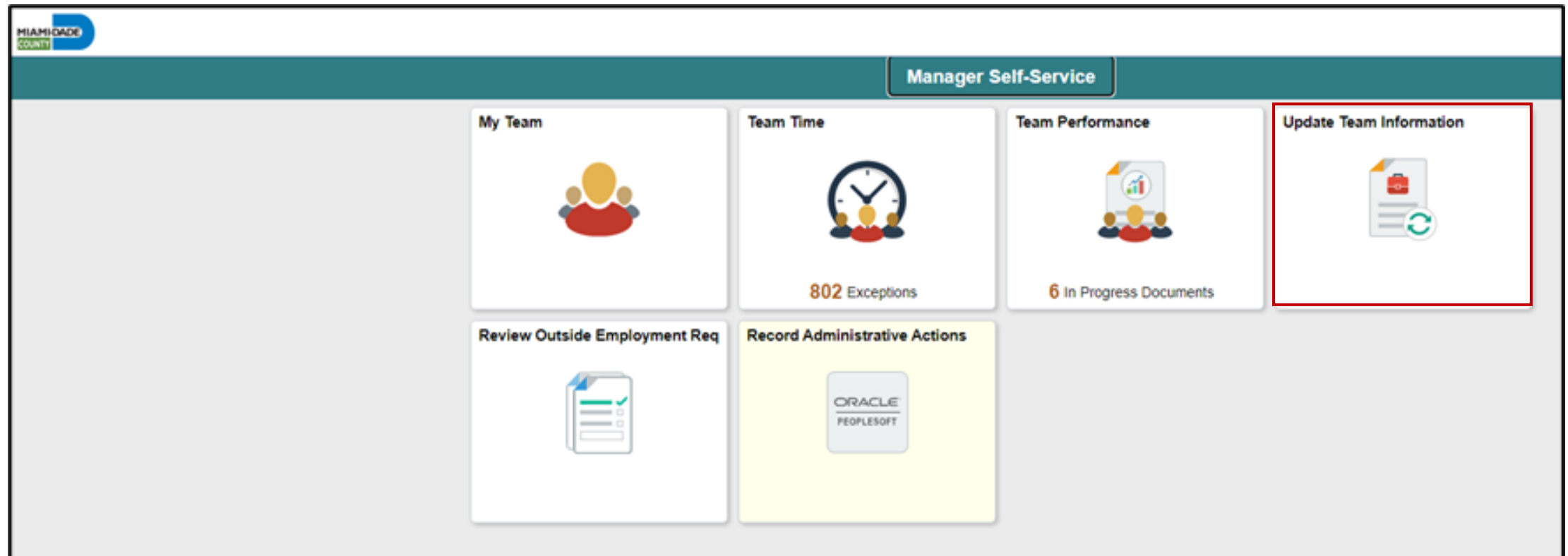# Lesson 4: Requesting leave on behalf of Employee

As a Manager, file for a leave of absence on behalf of an employee in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.

Lesson 4: Requesting leave on behalf of Employee Continued

2. Select **Update Team Information**.

Lesson 4: Requesting leave on behalf of Employee Continued

3. Select an employee who is requesting a leave of absence.

Lesson 4: Requesting leave on behalf of Employee Continued

4. Confirm that the **Reason** is **PERSONAL - LOA**.

Lesson 4: Requesting leave on behalf of Employee Continued

5. Type the date, or select the month, day, and year from the calendar icon when the employee is expected to return, and then select **Next**.

Lesson 4: Requesting leave on behalf of Employee Continued
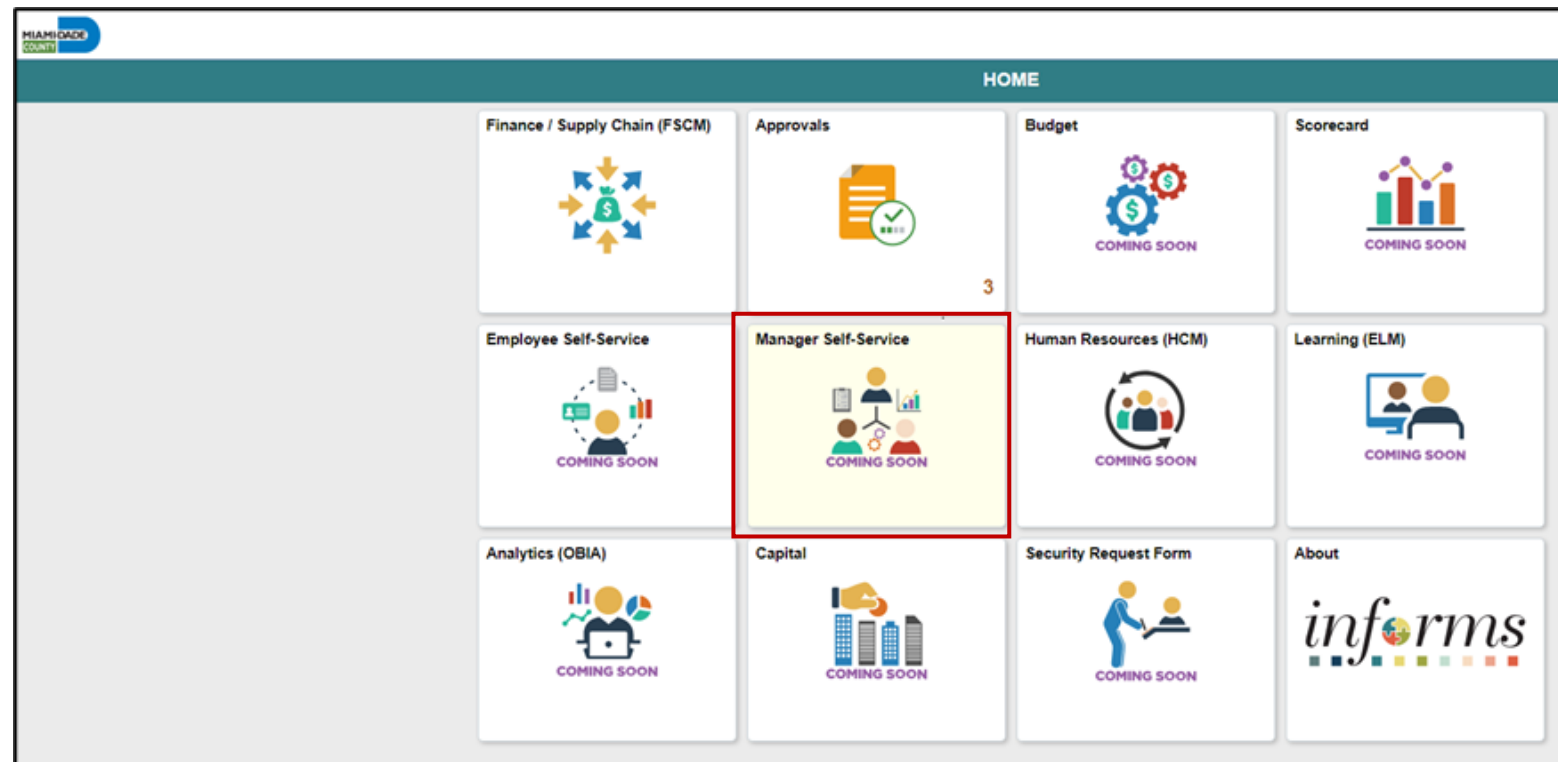
6. Provide **Comments** as needed, and then select **Submit**.

Lesson 4: Requesting leave on behalf of Employee Continued

File a Return from Leave

As a Manager, file for a return from leave on behalf of an employee in INFORMS.

1. Log into INFORMS and select **Manager Self-Service** from the home landing page below.

Lesson 4: Requesting leave on behalf of Employee Continued

2. Select **Update Team Information**.

Lesson 4: Requesting leave on behalf of Employee Continued

3. Select **Request Return from Leave**.

Lesson 4: Requesting leave on behalf of Employee Continued

4. Select an employee who is requesting a return from leave.

Lesson 4: Requesting leave on behalf of Employee Continued

5. Confirm that the **Reason** is **Return From Leave**, and then select **Next**.

Lesson 4: Requesting leave on behalf of Employee Continued

6. Provide **Comments** as needed, and then select **Submit**.

Lesson 4: Activities and Exercises
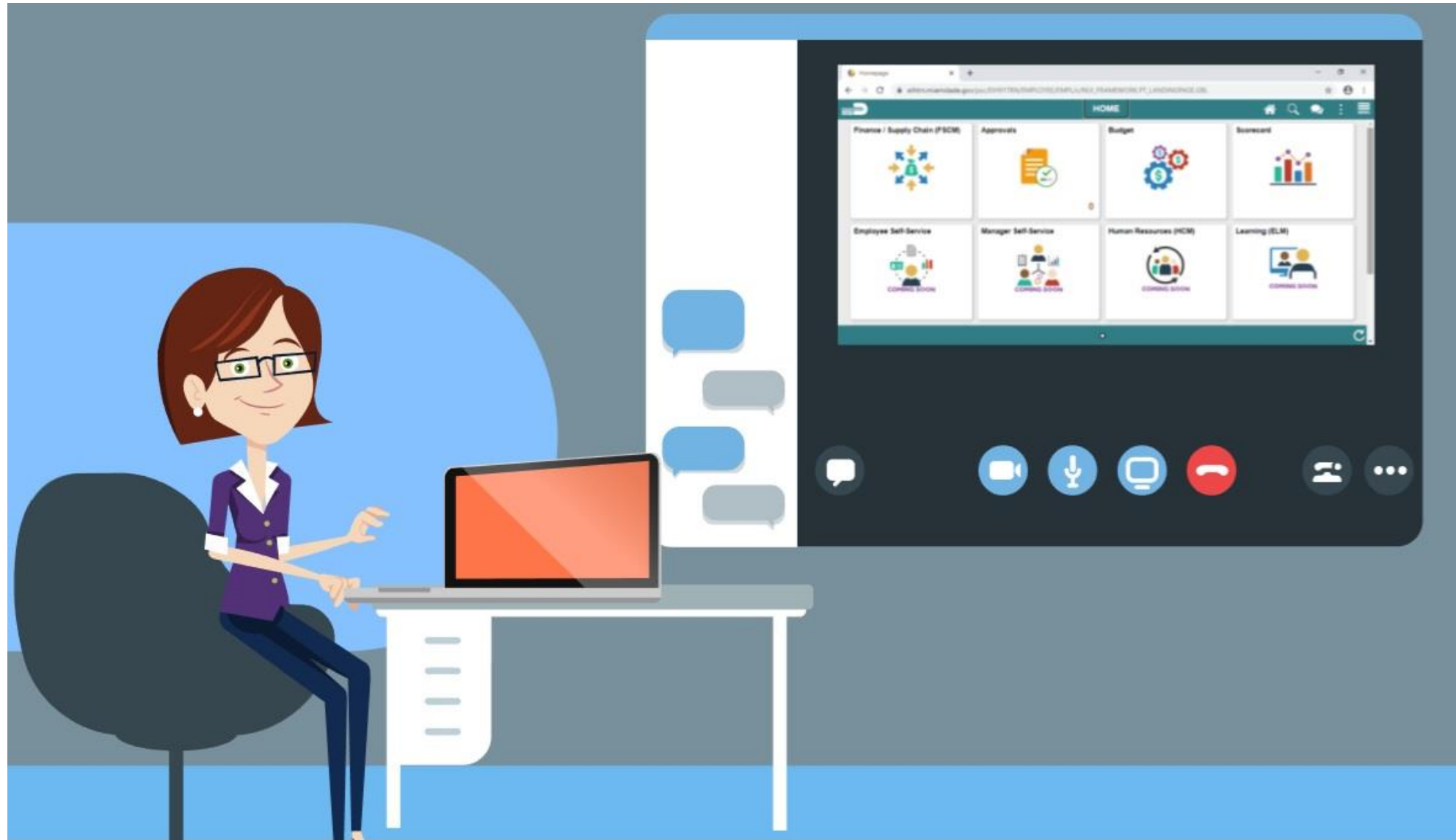
Lesson 4: Lesson Summary

Now that you have completed the Requesting Leave on behalf of Employee lesson, you should be able to:

- Submit a record for an employee's leave of absence
- Submit a record for an employee's return from leave

Module 3: Course Content Summary

- Congratulations on completing the Manager Self-Service course. You now understand:

    - Discipline Management

    - Retirement and Voluntary Separation

    - Involuntary Separation

    - Requesting leave on behalf of Employee

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 (Employee Retirement)
- Retirement and Voluntary Separation (Voluntary Separation)
- Retirement and Voluntary Separation (Approve Employee Retirement)
- Retirement and Voluntary Separation (Approve Employee Voluntary Separation)
- Involuntary Separation
- Requesting Leave on behalf of Employee (Entering Leave of Absence)
- Requesting Leave on behalf of Employee (Requesting Return from Leave)

For additional information, be sure to visit:

- www.miamidade.gov/informs

Congratulations on successfully completing the **Updating Team Information** course!

MSS 206 – Manager Self Service - Updating Team Information