

Course ID: MSS 206

Course: Manager Self Service - Updating Team Information

# Ground Rules



Be on time



Attendance



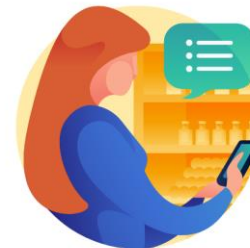
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the Updating Team Information processes.</p> <p>This course consists of the following modules:</p> <p>Module 1: Course Introduction</p> <ul style="list-style-type: none"><li>● Module 1: Course Introduction</li><li>● Module 2: Updating Team Information<ul style="list-style-type: none"><li>○ Discipline Management</li><li>○ Retirement and Voluntary Separation</li><li>○ Involuntary Separation</li><li>○ Requesting leave on behalf of Employee</li></ul></li><li>● Module 3: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>● Manager</li><li>● DPR</li><li>● Employees</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>● ERP 101 - Introductory Course - Overview of INFORMS</li><li>● ERP 102 - INFORMS Navigation, Reporting, and Online Help</li></ul>

# Course Overview

<b>Other Related Courses</b>	<ul style="list-style-type: none"><li>• MSS 204 - Manager Self Service – Time Management</li><li>• MSS 205 - Manager Self Service - ePerformance Management (Employee Performance Evaluation)</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 5 Hours and 30 Minutes</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

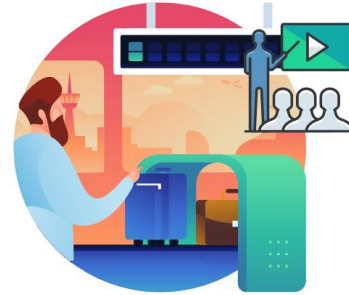
The End-to-End Business Process

Introduction to Demonstrations and Exercises

# Course Administration and Logistics



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



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



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

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

# Roles and Responsibilities

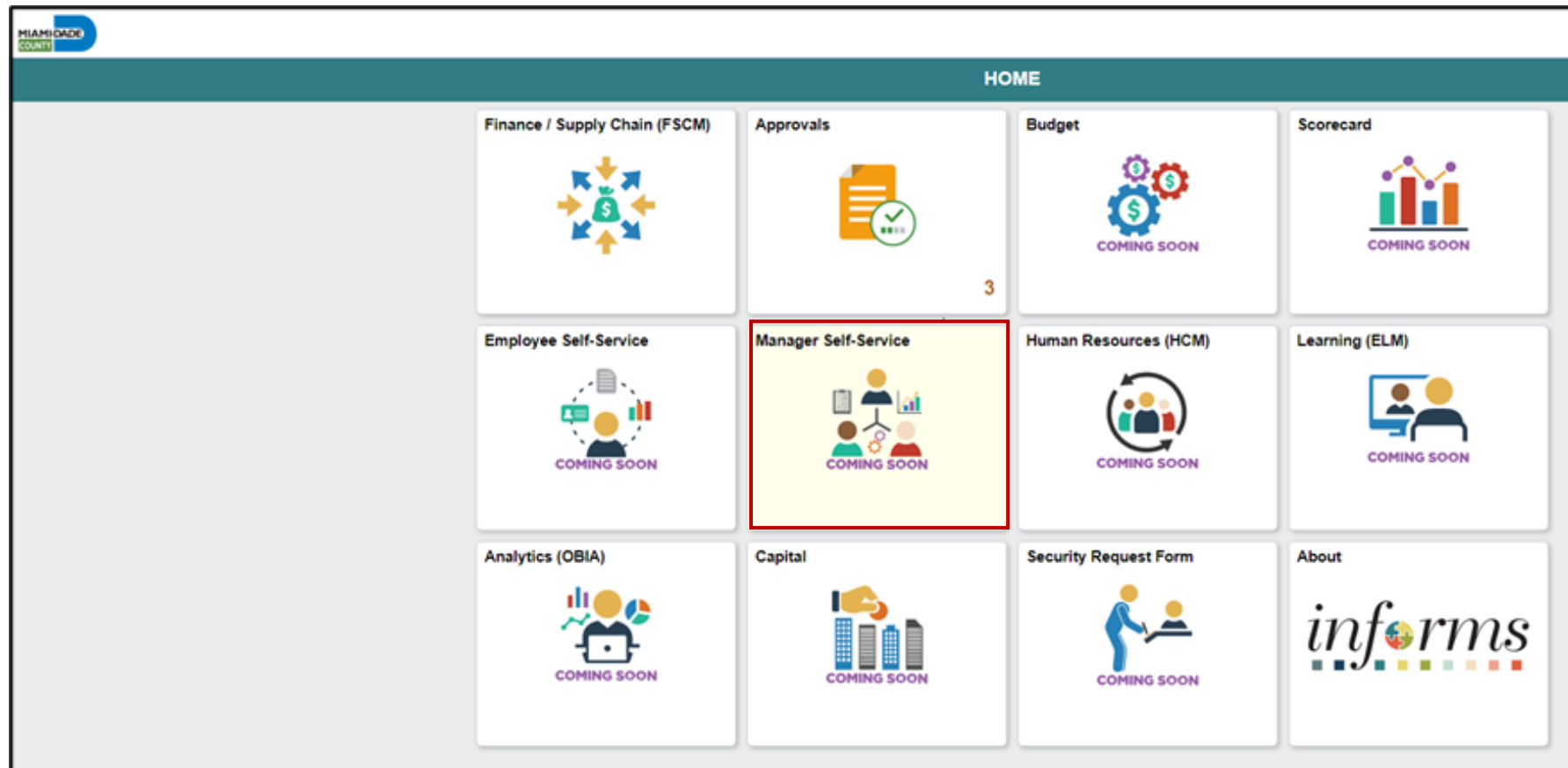
The following roles are associated with this course and will play a part in conducting the related business processes for the County:

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.
<b>Department Personnel Representative (DPR)</b>	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:



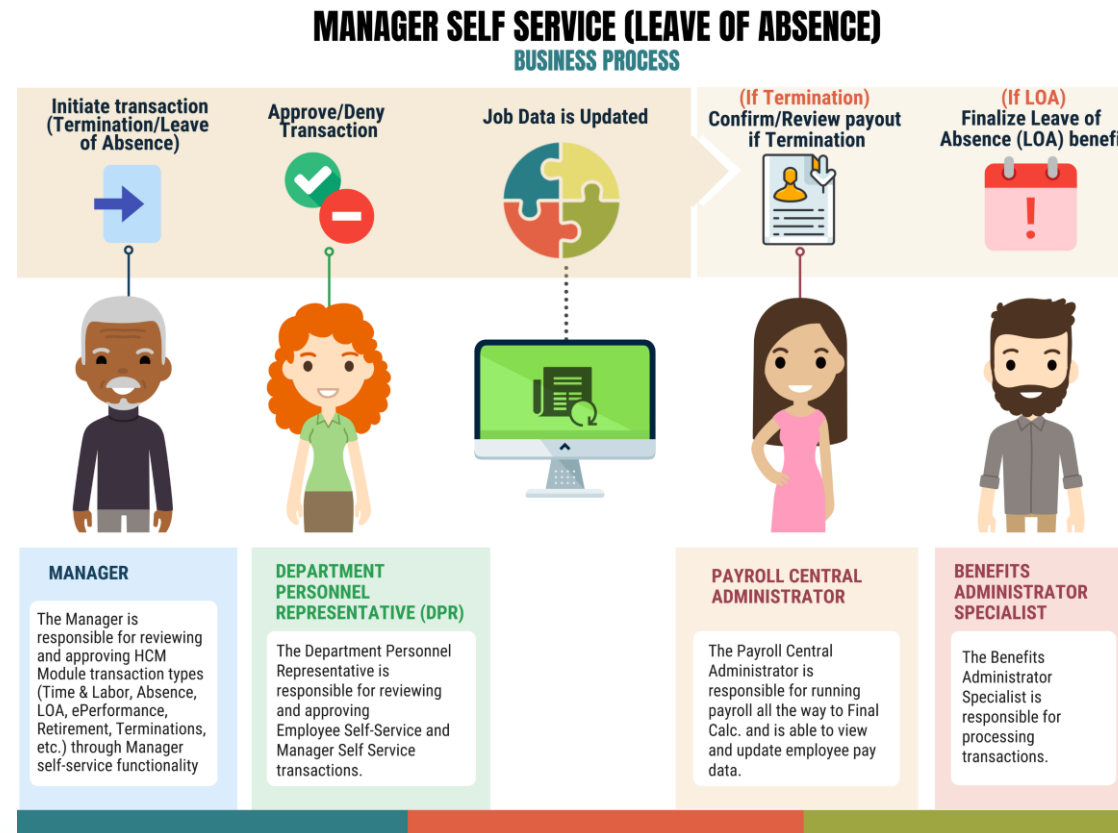
# Purpose and Benefits to Business Process

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.

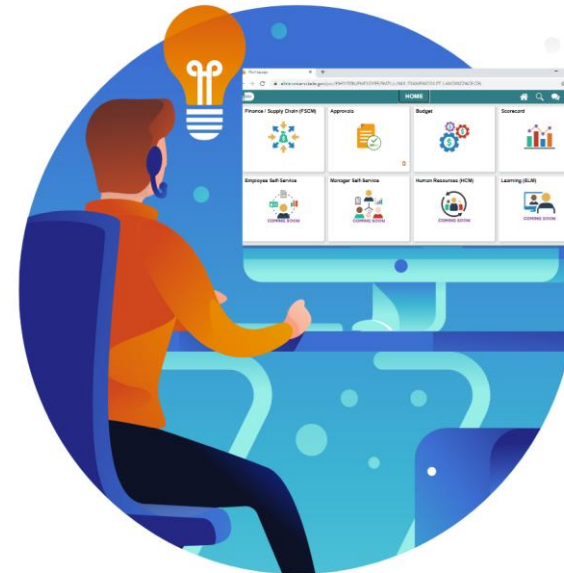


# Introduction to Activities and Exercises

- 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

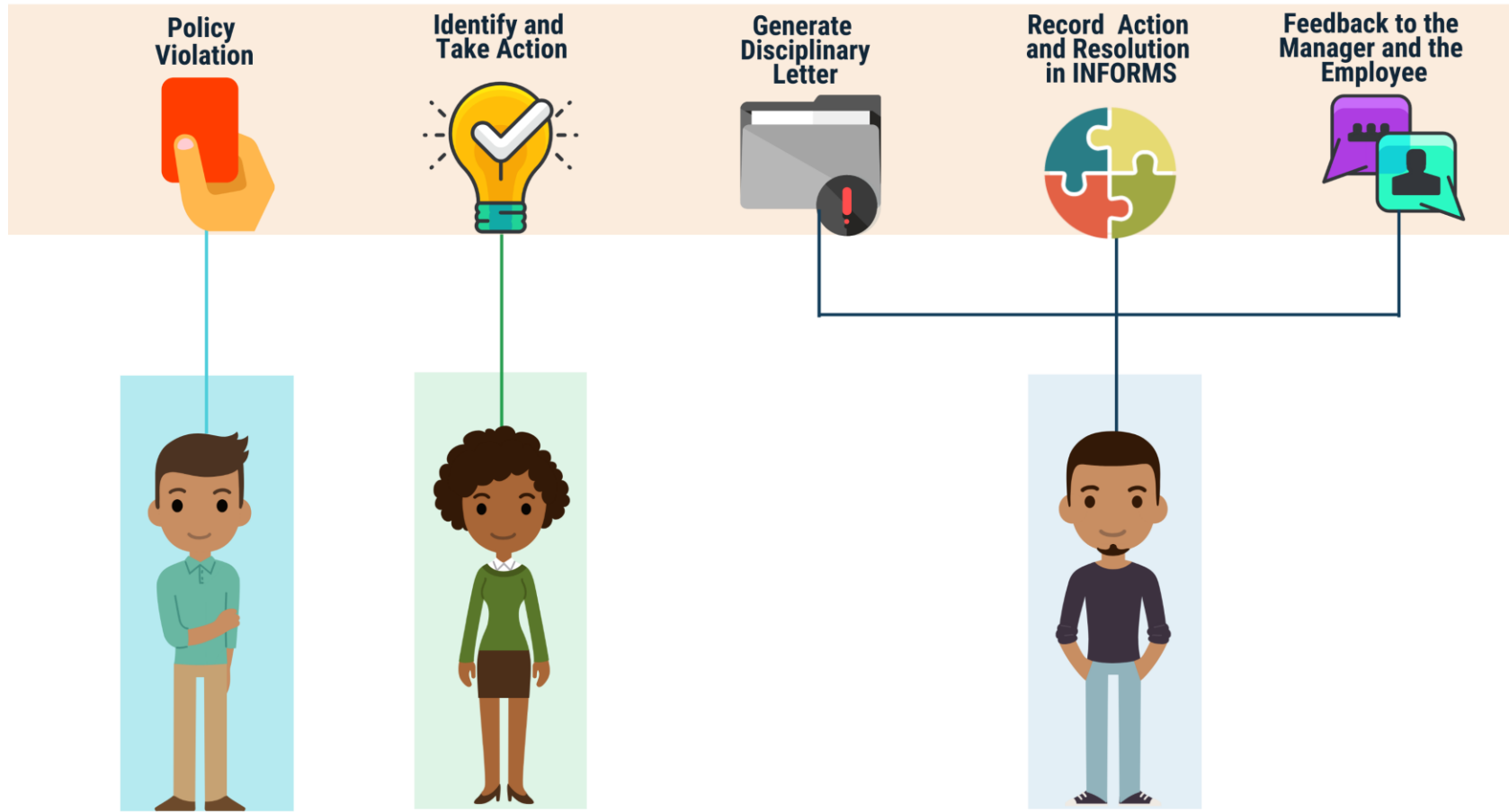
Lesson 4: Requesting Leave on behalf of Employee

# Lesson 1: Discipline Management

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

# Lesson 1: Discipline Management Continued

## DISCIPLINE MANAGEMENT BUSINESS PROCESS



**EMPLOYEE**

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

**MANAGER**

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

**DEPARTMENT PERSONNEL REPRESENTATIVE (DPR)**

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



# Lesson 1: Key Terms

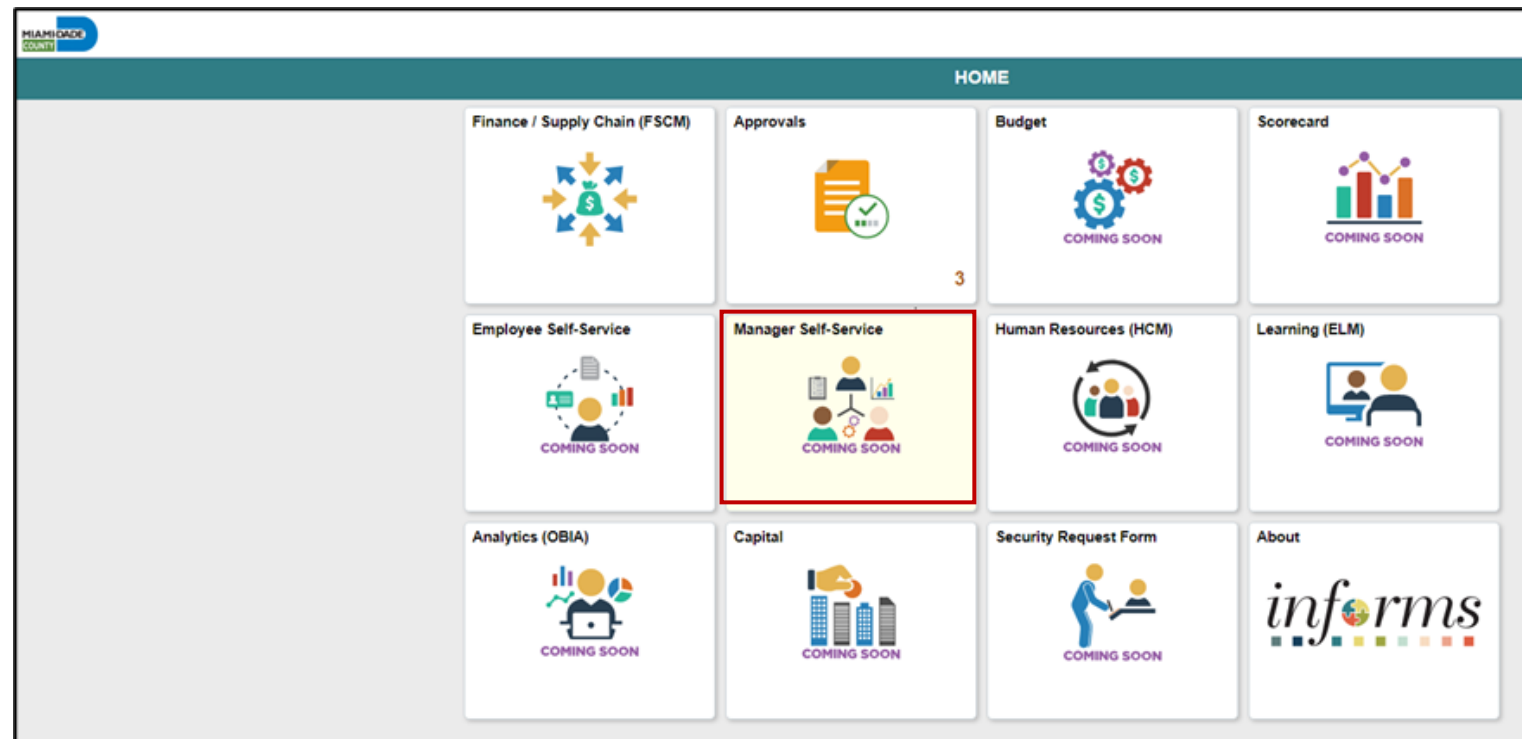
Term	Definition
<b>Department Personnel Representative (DPR)</b>	The Department Personnel Representative is responsible for reviewing and approving self-service Employee Self-Service and Manager Self Service transactions.
<b>Disciplinary Action</b>	Corrective action to reprimand the employee based on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

# Lesson 1: Discipline Management

## Record a Disciplinary Action and Action Taken

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.

The screenshot displays the 'Manager Self-Service' interface for Miami-Dade County. The interface features a teal header with the 'MIAMI-DADE COUNTY' logo on the left and the 'Manager Self-Service' title on the right. Below the header, there are six main action tiles arranged in two rows. The top row includes 'My Team' (with a group of people icon), 'Team Time' (with a clock icon and '802 Exceptions' text), 'Team Performance' (with a document and bar chart icon and '6 In Progress Documents' text), and 'Update Team Information' (with a document and refresh icon). The bottom row includes 'Review Outside Employment Req' (with a document icon) and 'Record Administrative Actions' (with an 'ORACLE PEOPLESFT' logo icon). The 'Record Administrative Actions' tile is highlighted with a red border, indicating it is the selected option.

# Lesson 1: Discipline Management Continued

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

The screenshot shows the 'Record Administrative Actions' page in the Manager Self-Service system. The page includes a header with the Miami-Dade County logo and navigation links. Below the header, there is a section titled 'Record Administrative Actions' with a sub-instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A green button labeled 'Find an Existing Value' is positioned above the search criteria section. The search criteria section is enclosed in a red box and contains the following fields:

- Empl ID: begins with [dropdown] [input field]
- First Name: begins with [dropdown] [input field]
- Last Name: begins with [dropdown] [input field]
- Payroll Status: = [dropdown] [dropdown menu]
- Employee Classification: begins with [dropdown] [input field]
- Employee Type: = [dropdown] [dropdown menu]
- Business Unit: begins with [dropdown] [input field containing 'LB']
- Supervisor ID: begins with [dropdown] [input field containing '00038584']
- Job Title: begins with [dropdown] [input field]

Below the search criteria, there is a checkbox for 'Case Sensitive'. At the bottom of the form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

# Lesson 1: Discipline Management Continued

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

The screenshot shows the 'Manager Self-Service' interface for Miami-Dade County. The page title is 'Record Administrative Actions'. There is a search bar with a 'Search' button and a 'Clear' button. Below the search bar, there are options for 'Basic Search' and 'Save Search Criteria'. The search results are displayed in a table with the following columns: Empl ID, First Name, Last Name, Payroll Status, Employee Classification, Employee Type, and Job Title. The table contains 10 rows of employee data. The row for employee ID 00184738 is highlighted with a red border.

Empl ID	First Name	Last Name	Payroll Status	Employee Classification	Employee Type	Job Title
00029546	Luz	Gutierrez	Active	AA	Hourly	Library As
00119754	Rommie	Brown III	Active	AE	Hourly	Library Pa
00184738	Norma	Salinas	Active	AA	Hourly	Library As
00185796	Jocelyne	Vieux	Active	AA	Hourly	Library As
00209602	Unita	Gustave	Active	AA	Hourly	Library As
00313118	Rachel	Boucher-Johnson	Active	AE	Hourly	Library Pa
00313119	Ricardo	Yuhico	Active	AA	Hourly	Library As
00315910	Madelin	Garcia	Active	AA	Hourly	Library As
00319413	Maliheh	Osanloo	Active	AA	Hourly	Library As

# 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.

MIAMI-DADE COUNTY  
Manager Self-Service Record Administrative Actions

Disciplinary Action | Action Taken | Disciplinary Resolution

Norma Salinas Person ID 00184739  
Total Incident 1

\*Type: DAR  
\*Incident Date: 01/14/2022  
Cost:   
Entered By: 00038584  
Supervisor ID: 00038584  
Initiating Supervisor:   
\*Disciplinary Date: 01/14/2022

Disciplinary Action Report  
DAR Number:   
Disciplinary Status: Active  
Associated DAR Number:   
Sheerly Moya  
Sheerly Moya

Confidential

Violations

Violations	Description	View Description
1 B	Offensive Conduct.	View Description

Discipline Offenses

Disciplinary Offense	Description
1	

# 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.

The screenshot displays the 'Record Administrative Actions' page in the Manager Self-Service system. It features several sections for selecting administrative actions:

- Discipline Offenses:** A table with columns 'Disciplinary Offense' and 'Description'. The first row shows 'DAR' and 'Refusal drug/alcohol test'. A search bar and pagination controls (1-1 of 1) are visible.
- Facts:** A red-bordered text input field for entering facts.
- Administrative/Implementing Orders:** A table with columns 'Administrative Orders' and 'Description'. The first row shows '7-36' and 'Workplace Violence'. A search bar and pagination controls (1-1 of 1) are visible.
- Departmental Standard Operational Procedures:** A table with columns 'Dept Standard Operational Proc', 'Effective Date', and 'Description'. The first row has an empty search field. A search bar and pagination controls (1-1 of 1) are visible.
- Miscellaneous Departmental Violations:** A table with columns 'Miscellaneous Dept Violations', 'Description', and 'View Description'. The first row has an empty search field. A search bar and pagination controls (1-1 of 1) are visible.

# 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.

**Attachments**

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

**Add Attachment**

**Print DAR**      **Print Notes**

**Save**   **Return to Search**   **Previous in List**   **Next in List**   **Notify**

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



# Lesson 1: Discipline Management Continued

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.

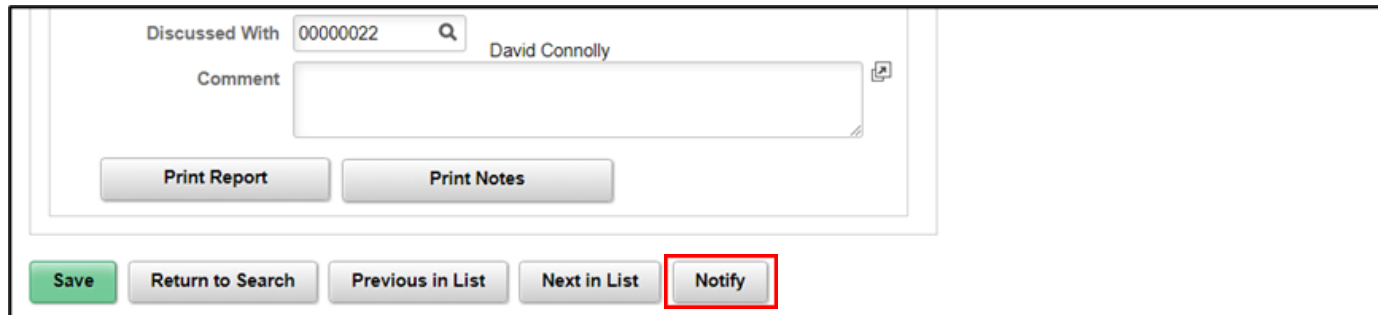
The screenshot displays the 'Record Administrative Actions' page in the Manager Self-Service system. The 'Action Taken' tab is active. The form contains the following information:

- Disciplinary Information:** Disciplinary Type: DAR, Incident Date: 01/14/2022, Disciplinary Action Report, DAR Number.
- Action Taken:** \*Disciplinary Step: PND (Pending), \*Action Date: 01/14/2022, Discussed With: 0000022 (David Connolly), Comment field.

Buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, and Notify.

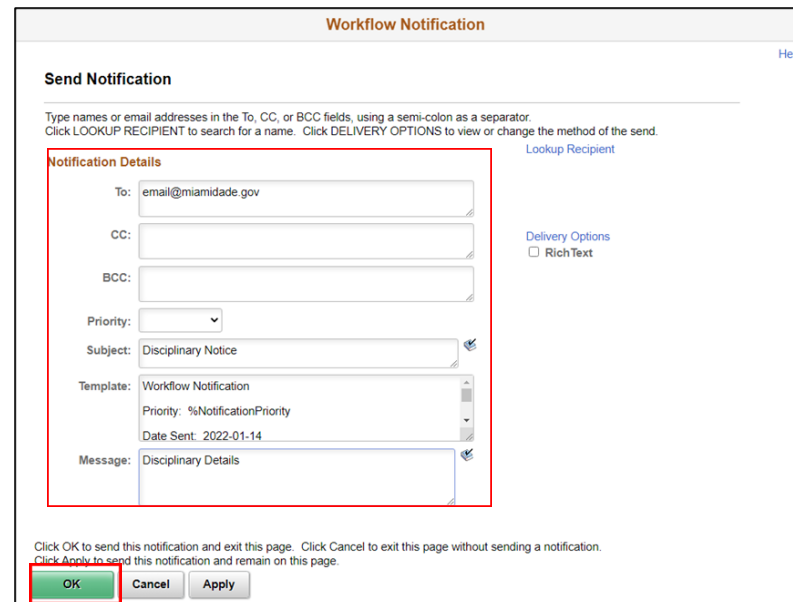
# Lesson 1: Discipline Management Continued

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



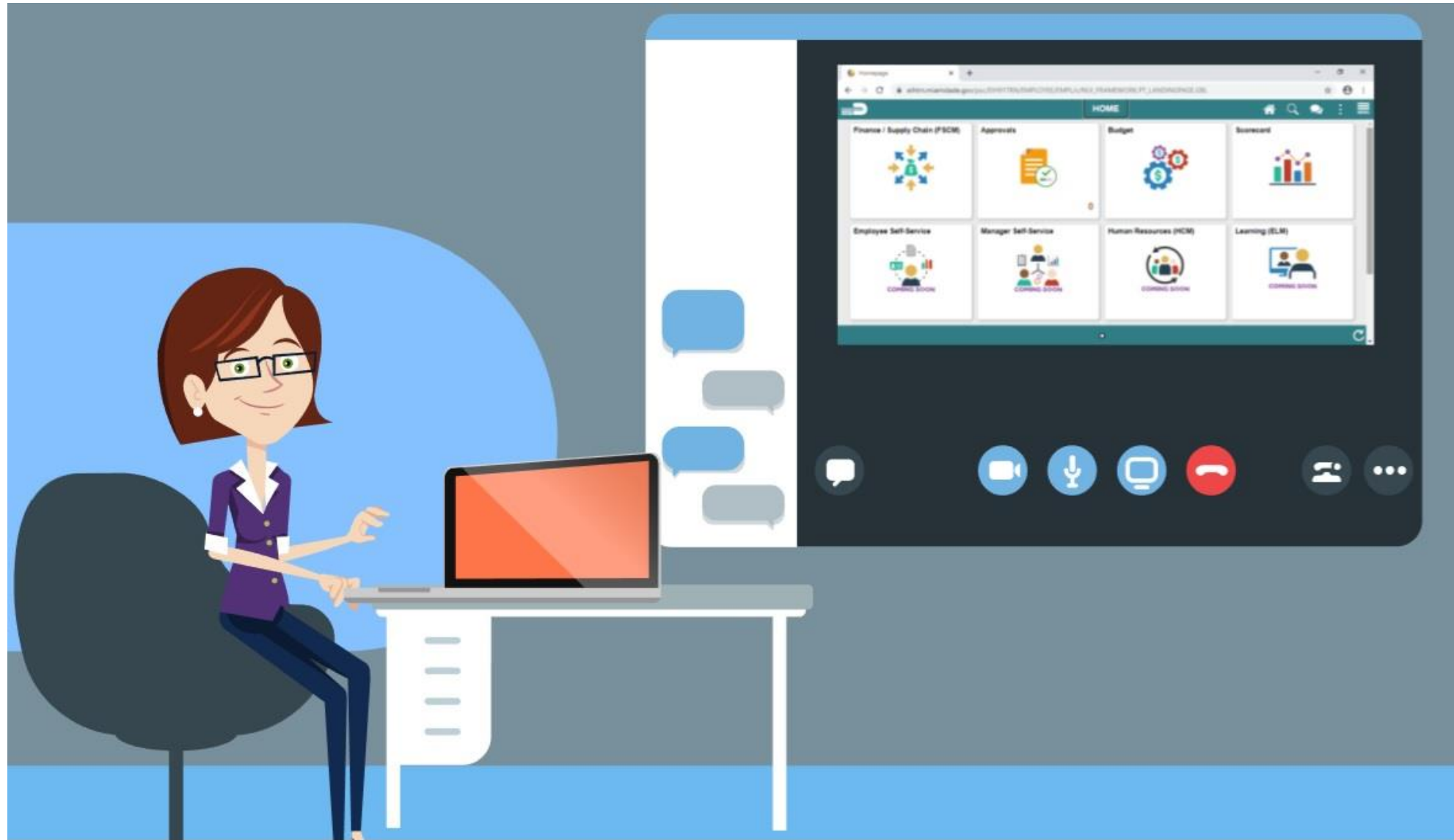
The screenshot shows a workflow management interface. At the top, there is a search field labeled 'Discussed With' with the value '00000022' and a magnifying glass icon. Below it, the name 'David Connolly' is displayed. A large text area labeled 'Comment' is empty. Below the comment area are two buttons: 'Print Report' and 'Print Notes'. At the bottom of the interface, there is a row of navigation buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The 'Notify' button is highlighted with a red rectangular border.

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



The screenshot shows a 'Workflow Notification' dialog box. The title bar reads 'Workflow Notification' and there is a 'Help' link in the top right corner. The main section is titled 'Send Notification' and contains instructions: 'Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.' Below this, there is a 'Lookup Recipient' link. The 'Notification Details' section is highlighted with a red rectangular border and contains the following fields: 'To:' with the value 'email@miamidade.gov', 'CC:', 'BCC:', 'Priority:' with a dropdown arrow, 'Subject:' with the value 'Disciplinary Notice', 'Template:' with the value 'Workflow Notification', and 'Message:' with the value 'Disciplinary Details'. To the right of these fields are 'Delivery Options' with a 'RichText' checkbox. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Apply'. The 'OK' button is highlighted with a red rectangular border.

# Lesson 1: Activities and Exercises



# Lesson 1: Lesson Summary

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

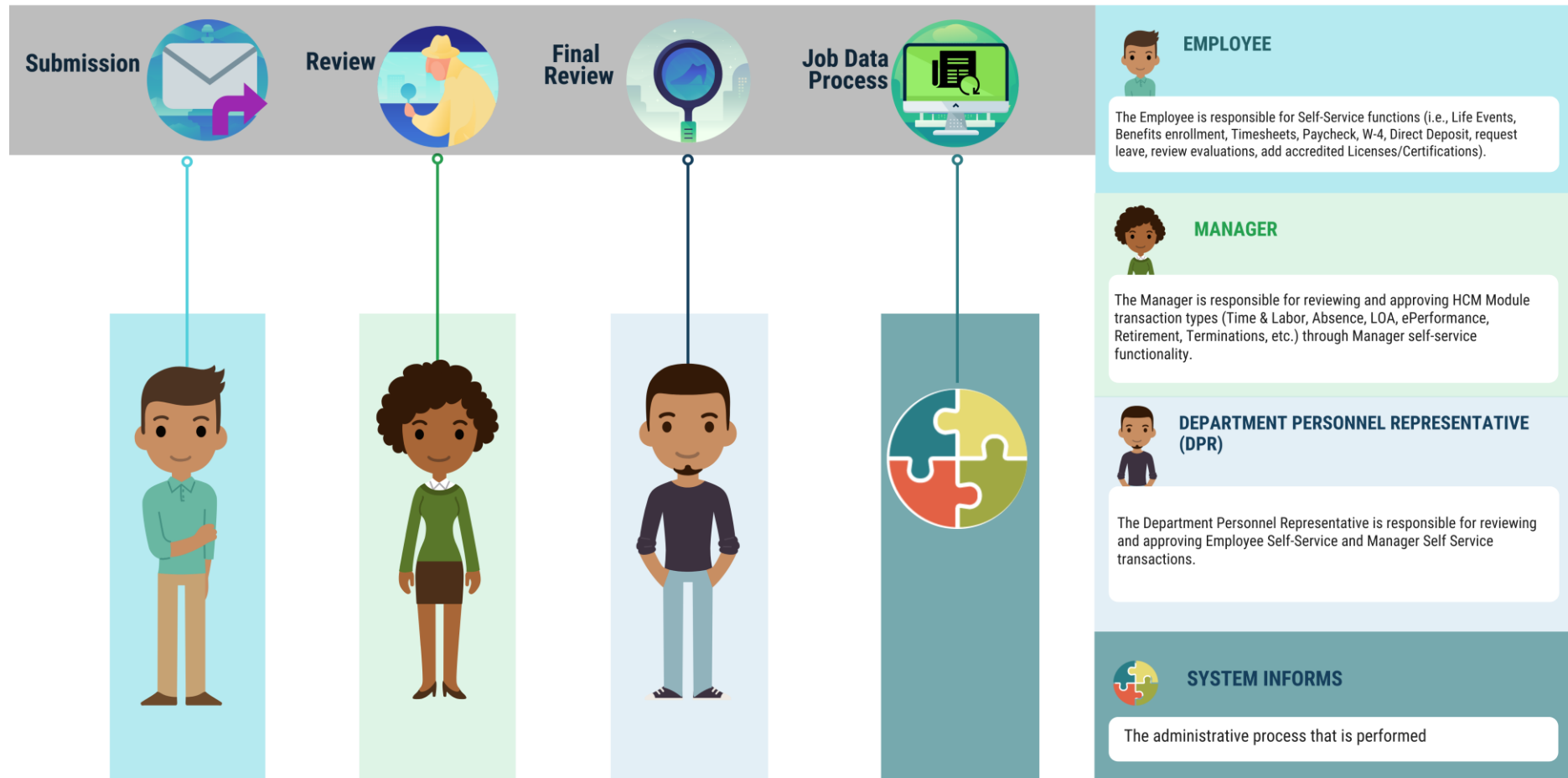
- Record employee Disciplinary Action and Action Taken Records.
- Record employee Disciplinary Resolution Records.

# 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



# Lesson 2: Key Terms

Term	Definition
<b>Retirement</b>	The employee's decision to retire from the County.
<b>Voluntary Separation</b>	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.



The screenshot displays the Manager Self-Service interface. The top navigation bar includes the Miami-Dade County logo and the 'Manager Self-Service' tab. The main content area contains six tiles:

- My Team**: Represented by an icon of three stylized people.
- Team Time**: Represented by a clock icon, showing 802 Exceptions.
- Team Performance**: Represented by a document with a bar chart icon, showing 6 In Progress Documents.
- Update Team Information**: Represented by a document with a refresh icon, highlighted with a red border.
- Review Outside Employment Req**: Represented by a document icon with a checkmark.
- Record Administrative Actions**: Represented by the Oracle PeopleSoft logo.

# Lesson 2: Retirement and Voluntary Separation Continued

## 3. Select Retire Employee.

The screenshot shows a web application interface for 'Update Team Information' with the Miami-Dade County logo in the top left. A left sidebar contains several menu items: 'Request Leave of Absence', 'Request Paid Leave of Absence', 'Request Return from Leave', 'Retire Employee' (highlighted with a red border), and 'Terminate Employee'. The main content area is titled 'Request Leave of Absence' and includes a 'Search Options' section. Below this is a 'Select Employee' section with a table containing two rows of employee data. The table has columns for 'Name / Title / ID - Record', 'Directs / Total', and 'Status / Type'. The first row is for A Leroy A Blake, a Bus Maint Tech with ID A0208472 - 0, who is on Leave of Absence. The second row is for A Paul AVillaverde, a Police Sergeant with ID A0031761 - 0, who is Active. Both rows have a right-pointing arrow icon.

Name / Title / ID - Record	Directs / Total	Status / Type
 A Leroy A Blake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
 A Paul AVillaverde Police Sergeant A0031761 - 0		Active Employee

# Lesson 2: Retirement and Voluntary Separation Continued

4. Select an employee to retire.

The screenshot displays the 'Retire Employee' page in the Miami-Dade County system. The page title is 'Update Team Information'. On the left sidebar, there are several navigation options: 'Request Leave of Absence', 'Request Paid Leave of Absence', 'Request Return from Leave', 'Retire Employee' (which is highlighted), and 'Terminate Employee'. The main content area is titled 'Retire Employee' and includes a 'Search Options' section. Below this is a table with the heading 'Select Employee' and '2 rows'. The table has three columns: 'Name / Title / ID - Record', 'Directs / Total', and 'Status / Type'. The first row is for 'ALeroy ABlake', a 'Bus Maint Tech' with ID 'A0208472 - 0', who is on 'Leave of Absence Employee'. The second row is for 'APaul AVillaverde', a 'Police Sergeant' with ID 'A0031761 - 0', who is an 'Active Employee'. This second row is highlighted with a red border, and a 'Select Employee' button is located at the bottom of this row.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

# Lesson 2: Retirement and Voluntary Separation Continued

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

**MIAMI-DADE COUNTY** informs

**Retire Employee**

APaul AVillaverde  
Police Sergeant

1 Job Detail ————— 2 Review & Submit

**Next >**

**Work and Job Information**

\*Transaction Date 01/13/2022

\*Reason Retirement

**Current Information**

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

# Lesson 2: Retirement and Voluntary Separation Continued

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

**Retire Employee**

APaul AVillaverde  
Police Sergeant

1 Job Detail      2 Review & Submit

← Previous      **Submit**

**Review and Submit**

Transaction Date 01/13/2022  
Reason Retirement

**Current Information**

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

**Comments**

[Red box highlights the 'Submit' button and the 'Comments' text area]

# 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.

The screenshot displays the Manager Self-Service interface. The top navigation bar includes the Miami-Dade County logo and the 'Manager Self-Service' tab. The main content area is organized into a grid of tiles. The 'Update Team Information' tile is highlighted with a red border, indicating the current step in the process. Other tiles include 'My Team', 'Team Time' (showing 802 Exceptions), 'Team Performance' (showing 6 In Progress Documents), 'Review Outside Employment Req', and 'Record Administrative Actions' (featuring the Oracle PeopleSoft logo).

# Lesson 2: Retirement and Voluntary Separation Continued

## 3. Select Terminate Employee.

MIAMI-DADE COUNTY

Back Update Team Information



- Request Leave of Absence
- Request Paid Leave of Absence
- Request Return from Leave
- Retire Employee
- Terminate Employee**

### Request Leave of Absence

Search Options

### Select Employee

2 rows

Name / Title / ID - Record	Directs / Total	Status / Type
 <b>ALeroy ABlake</b> Bus Maint Tech A0208472 - 0		Leave of Absence Employee
 <b>APaul AVillaverde</b> Police Sergeant A0031761 - 0		Active Employee



# Lesson 2: Retirement and Voluntary Separation Continued

4. Select an employee to resign.

**MIAMI-DADE COUNTY**

[Back](#) **Update Team Information** [Home](#) [C](#)

- Request Leave of Absence
- Request Paid Leave of Absence
- Request Return from Leave
- Retire Employee
- Terminate Employee**

### Terminate Employee

▶ **Search Options**

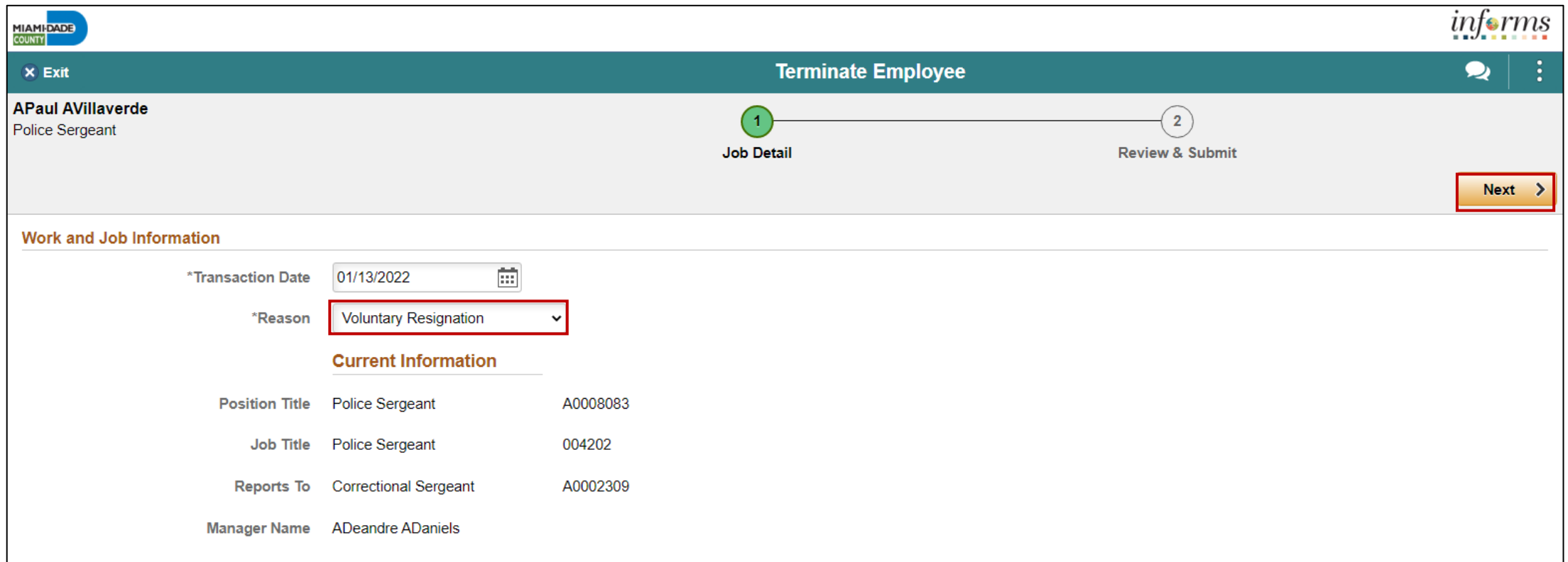
**Select Employee** 2 rows

Name / Title / ID - Record	Directs / Total	Status / Type
<b>ALeroy ABlake</b> Bus Maint Tech A0208472 - 0		Leave of Absence Employee
<b>APaul AVillaverde</b> Police Sergeant A0031761 - 0		Active Employee

Select Employee

# Lesson 2: Retirement and Voluntary Separation Continued

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



**MIAMI-DADE COUNTY** informs

[Exit](#) **Terminate Employee**

APaul AVillaverde  
Police Sergeant

1 Job Detail      2 Review & Submit

**Next** >

**Work and Job Information**

\*Transaction Date: 01/13/2022

\*Reason: Voluntary Resignation

**Current Information**

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

# Lesson 2: Retirement and Voluntary Separation Continued

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

**Retire Employee**

APaul AVillaverde  
Police Sergeant

1 Job Detail      2 Review & Submit

< Previous      Submit

**Review and Submit**

Transaction Date	01/13/2022	
Reason	Retirement	
<b>Current Information</b>		
Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

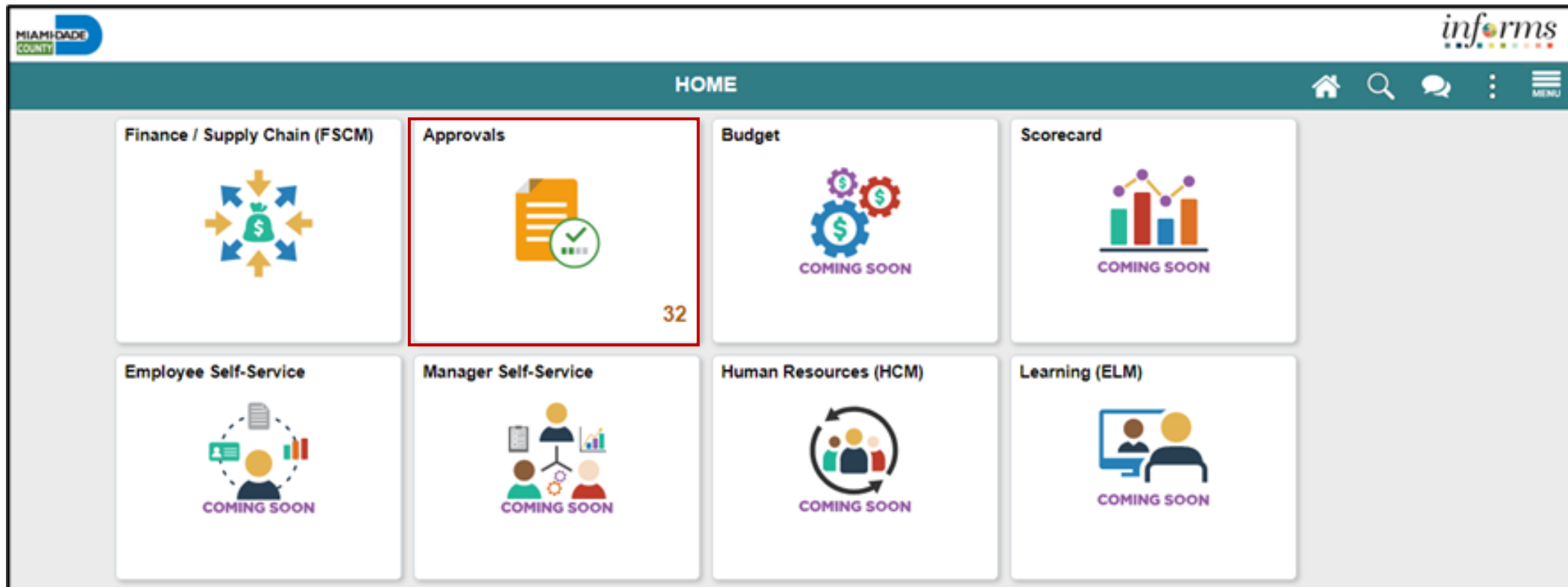
**Comments**

# 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**.



The screenshot displays the INFORMS dashboard interface. At the top left is the Miami-Dade County logo, and at the top right is the 'informs' logo. A teal navigation bar contains the word 'HOME' and icons for home, search, chat, and a menu. The dashboard features eight tiles: 'Finance / Supply Chain (FSCM)', 'Approvals' (highlighted with a red border and showing a count of 32), 'Budget', 'Scorecard', 'Employee Self-Service', 'Manager Self-Service', 'Human Resources (HCM)', and 'Learning (ELM)'. The 'Approvals' tile contains an icon of a document with a checkmark. The other tiles contain various icons and the text 'COMING SOON'.

# Lesson 2: Retirement and Voluntary Separation Continued

## 2. Select Retire Employee.

The screenshot shows a mobile application interface for 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below this is a list of approval types with their respective counts: All (270), Address Change (3), Create Position (12), DPR Salary Change (92), Forms (46), Job Opening (1), Manage Position (9), Payable Time (100), Reported Time (1), Request Leave of Absence (2), Retire Employee (2), and Terminate Employee (2). The 'Retire Employee' item is highlighted with a red box. The main content area shows a list of 270 rows of pending approvals. The first row is for 'APaul AVillaverde' with a 'Payable Time' of 'Quantity for Approval -16 Hours' and a 'Routed' date of '08/04/2020'. The subsequent 10 rows shown are all for 'Payable Time' with a quantity of '0 Hours' and a 'Routed' date of '09/03/2020'. At the bottom of the sidebar, it says 'Some transactions are not displayed.'

# Lesson 2: Retirement and Voluntary Separation Continued

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

The screenshot shows a mobile application interface with a teal header bar. On the left, there is a navigation menu with a 'HOME' button and a 'View By' dropdown set to 'Type'. The menu items are: All (271), Address Change (3), Create Position (12), DPR Salary Change (91), and Forms (46). The main content area is titled 'Pending Approvals' and shows a list of two 'Retire Employee' requests. The first request is highlighted with a red border and contains the text: 'Retire Employee', 'Reason - Retirement', 'Dwight Wilson Jr', 'Routed 03/16/2021', and a right-pointing arrow. The second request contains: 'Retire Employee', 'Reason - Retirement', 'Esther Reyes', 'Routed 09/21/2021', and a right-pointing arrow. The top right of the screen features icons for home, notifications (6), and a menu.

Pending Approvals	
View By: Type	
All	271
Address Change	3
Create Position	12
DPR Salary Change	91
Forms	46
<b>Retire Employee</b> 2 rows	
Retire Employee Dwight Wilson Jr	Reason - Retirement Routed 03/16/2021
Retire Employee Esther Reyes	Reason - Retirement Routed 09/21/2021

# Lesson 2: Retirement and Voluntary Separation Continued

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

**Pending Approvals** Retire Employee

**Dwight Wilson Jr**  
Hr Services Clerk

**Approve** **Deny**

**Summary**

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

**Unchanged Job Information**

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

**Requester Comments**

None

**Approver Comments**

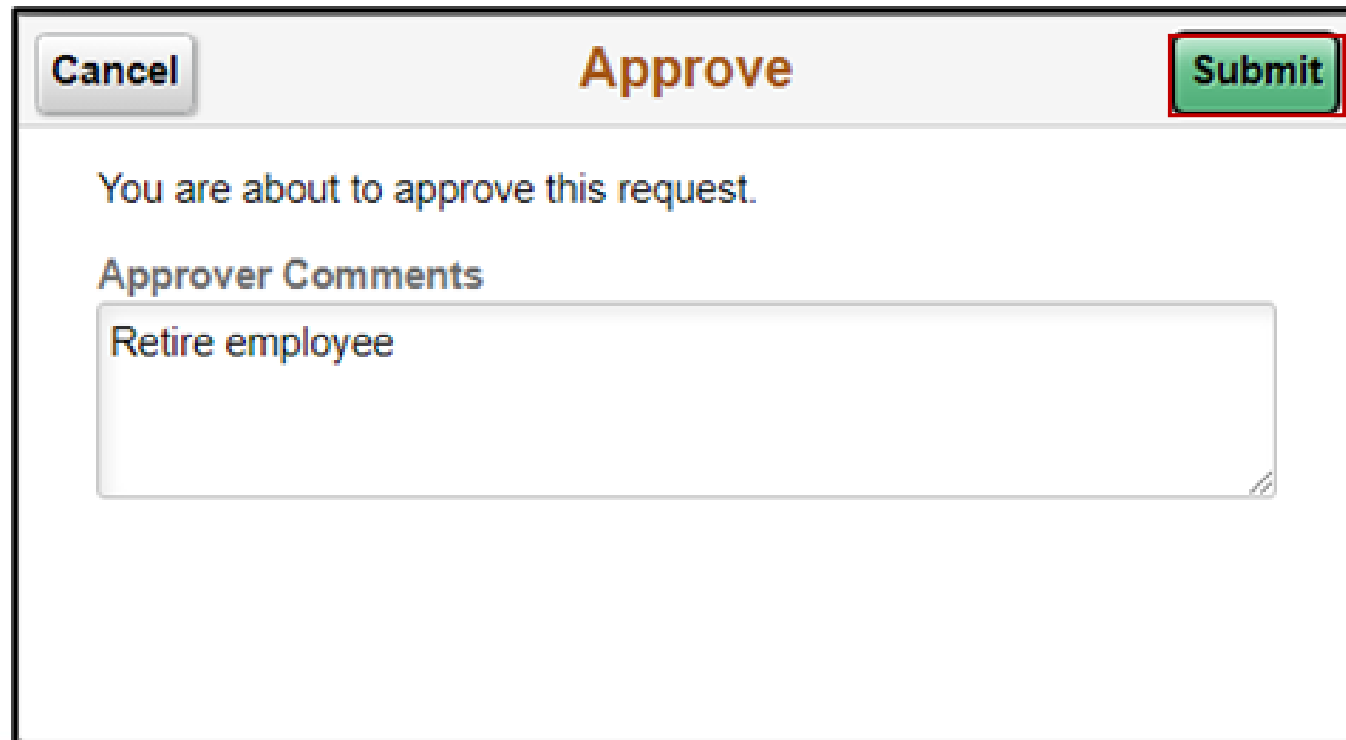
Retire employee

Approval Chain >

# Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

**Note: Approver Comments** can be changed as needed.



The screenshot shows a dialog box titled "Approve". At the top, there are three buttons: "Cancel", "Approve", and "Submit". The "Submit" button is highlighted with a red border. Below the buttons, the text reads "You are about to approve this request." followed by a section labeled "Approver Comments" containing a text input field with the text "Retire employee".

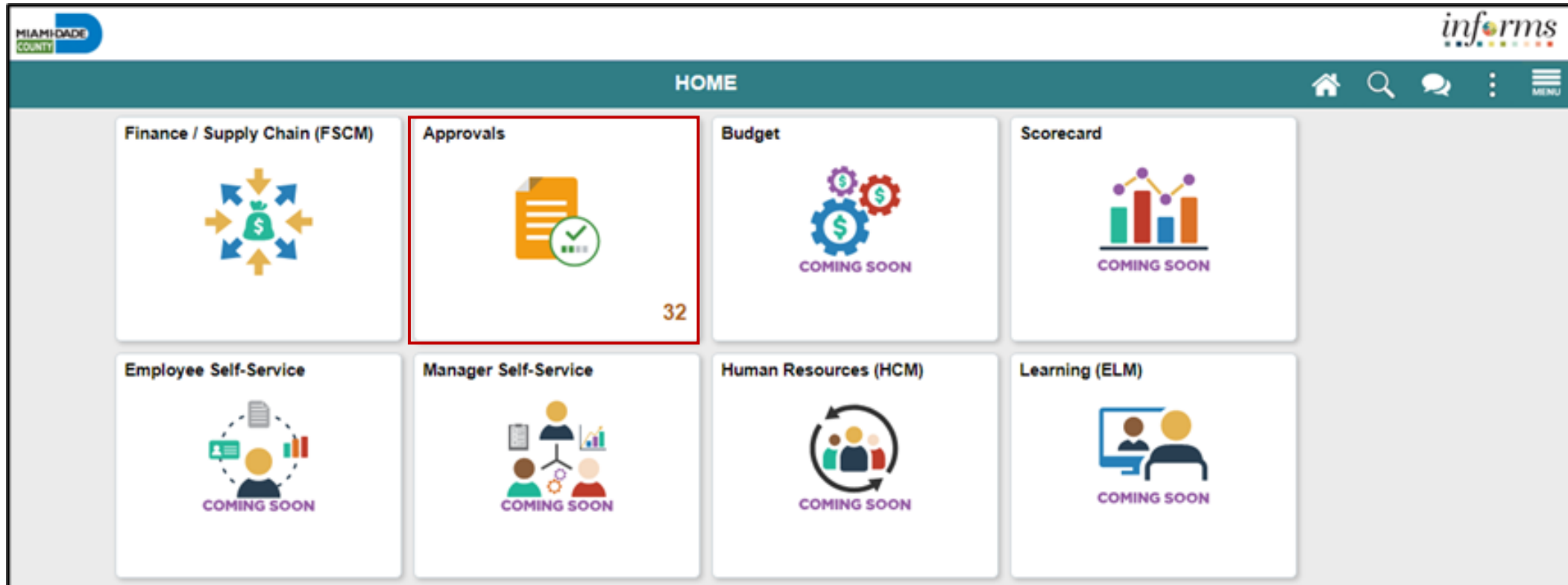


# Lesson 2: Retirement and Voluntary Separation Continued

## Approve Employee Voluntary Separation

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

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



The screenshot displays the INFORMS dashboard interface. At the top left is the Miami-Dade County logo, and at the top right is the 'informs' logo. A teal navigation bar contains the word 'HOME' and icons for home, search, chat, and a menu. The dashboard features eight tiles: 'Finance / Supply Chain (FSCM)', 'Approvals' (highlighted with a red border and showing a count of 32), 'Budget', 'Scorecard', 'Employee Self-Service', 'Manager Self-Service', 'Human Resources (HCM)', and 'Learning (ELM)'. The 'Approvals' tile contains an icon of a document with a checkmark. The other tiles contain icons representing their respective functions and are marked 'COMING SOON'.

# Lesson 2: Retirement and Voluntary Separation Continued

## 2. Select Terminate Employee.

The screenshot displays a mobile application interface for 'Pending Approvals'. On the left, a sidebar menu lists various transaction types with their respective counts. The 'Terminate Employee' option is highlighted with a red box. The main area shows a list of pending approvals, with the first entry selected to show details.

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

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

# Lesson 2: Retirement and Voluntary Separation Continued

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

The screenshot displays the 'Pending Approvals' interface. On the left, there is a navigation menu with 'View By' set to 'Type'. The menu items are: All (270), Address Change (3), Create Position (12), DPR Salary Change (91), and Forms (46). The main content area shows a list of pending approvals under the heading 'Terminate Employee'. There are two rows of data, with the second row highlighted in red. The first row is for Ricardo Diaz, with the reason 'End of Assignment' and a status of 'Routed' on 10/30/2020. The second row is for Happy Halleburton, with the reason 'Voluntary Resignation' and a status of 'Routed' on 03/17/2021, and it includes one attachment.

Terminate Employee		2 rows
Terminate Employee Ricardo Diaz	Reason - End of Assignment	Routed 10/30/2020
Terminate Employee Happy Halleburton	Reason - Voluntary Resignation Attachments 1	Routed 03/17/2021

# Lesson 2: Retirement and Voluntary Separation Continued

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

The screenshot shows a web application interface for 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type' and a list of categories: All (270), Address Change (3), Create Position (12), DPR Salary Change (91), and Forms (46). The main content area is titled 'Pending Approvals' and shows a table of pending actions. The table has two rows, both under the heading 'Terminate Employee'. The first row is for Ricardo Diaz, with the reason 'End of Assignment', dated 'Routed 10/30/2020'. The second row is for Happy Halleburton, with the reason 'Voluntary Resignation' and 'Attachments 1', dated 'Routed 03/17/2021'. This second row is highlighted with a red border. The top right of the page has navigation icons for home, notifications (6), and a menu.

Pending Approvals		2 rows	
<b>Terminate Employee</b> Ricardo Diaz	Reason - End of Assignment	Routed	10/30/2020
<b>Terminate Employee</b> Happy Halleburton	Reason - Voluntary Resignation Attachments 1	Routed	03/17/2021

# Lesson 2: Retirement and Voluntary Separation Continued

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

**Pending Approvals** Terminate Employee

**Happy Halleburton**  
Office Support Specialist 1

**Approve** **Deny**

**Summary**

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

**Unchanged Job Information**

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

**Attachments**

Attachments >

**Requester Comments**

test

**Approver Comments**

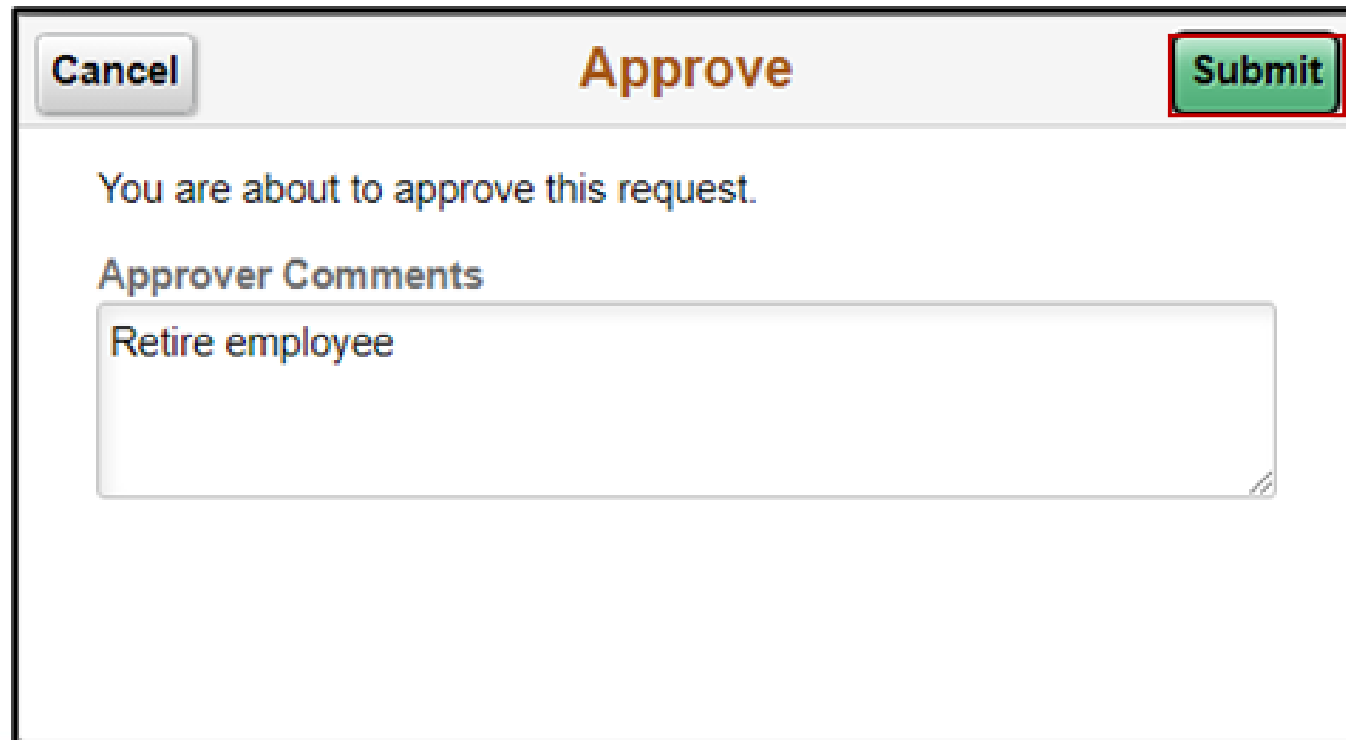
Voluntary resignation

Approval Chain >

# Lesson 2: Retirement and Voluntary Separation Continued

5. Select **Submit**.

**Note: Approver Comments** can be changed as needed.



The screenshot shows a dialog box titled "Approve" with three buttons at the top: "Cancel", "Approve", and "Submit". The "Submit" button is highlighted with a red border. Below the buttons, the text reads "You are about to approve this request." followed by a section labeled "Approver Comments" containing a text input field with the text "Retire employee".

# 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

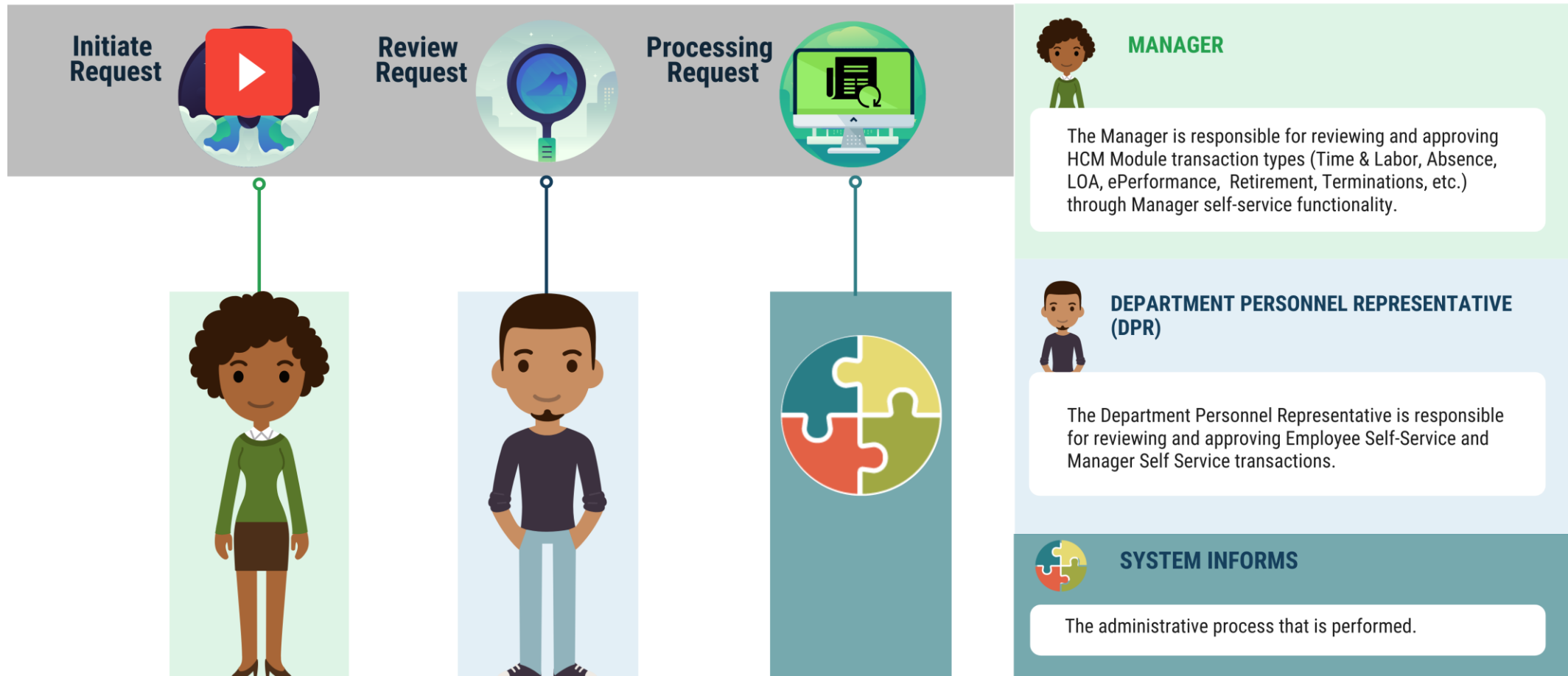
# Lesson 3: Involuntary Separation

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



# Lesson 3: Involuntary Separation

## INVOLUNTARY SEPARATION APPROVALS BUSINESS PROCESS



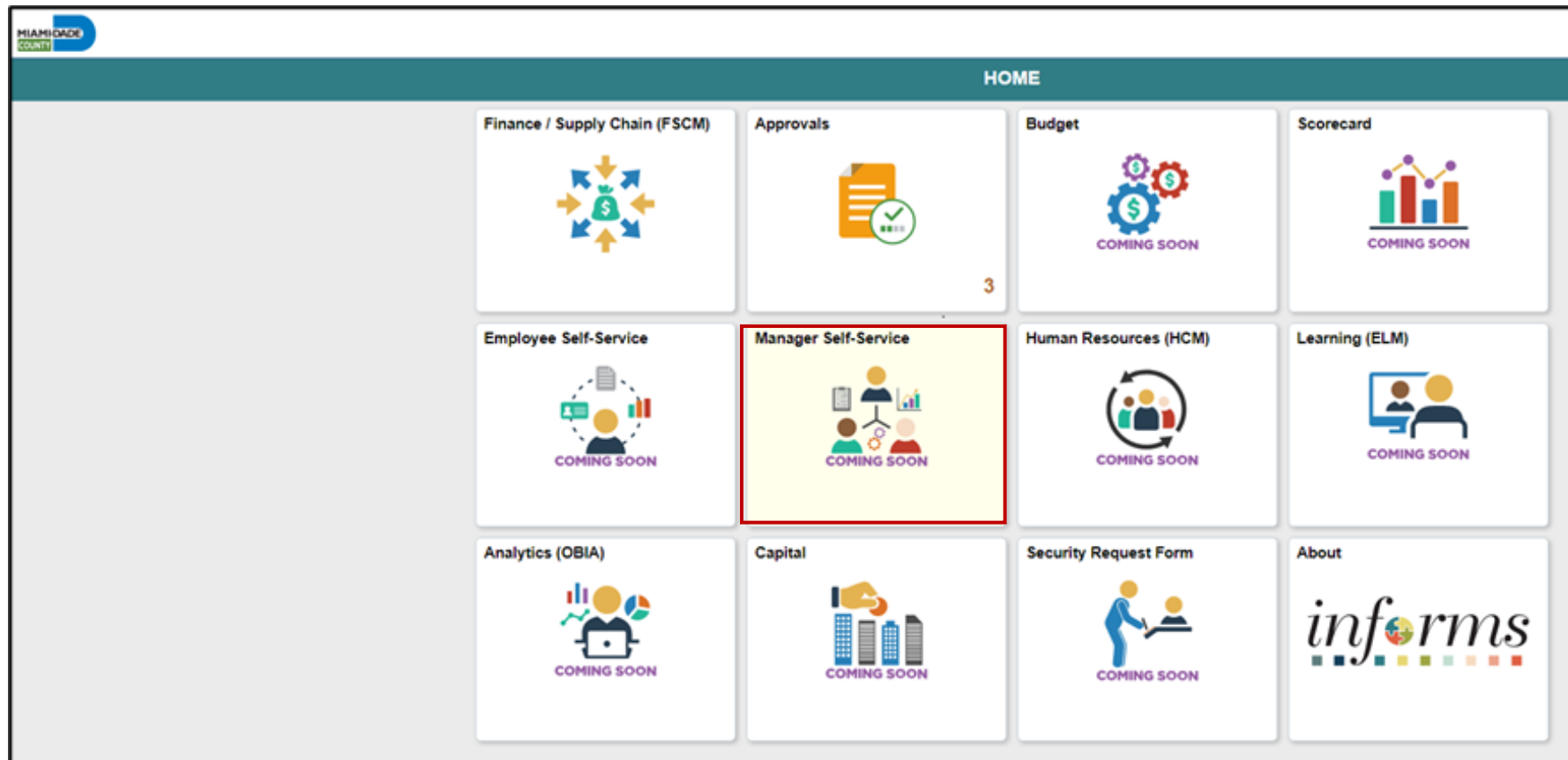
# Lesson 3: Key Terms

Term	Definition
<b>Involuntary Separation</b>	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.

MIAMI-DADE COUNTY

Manager Self-Service

My Team

Team Time  
802 Exceptions

Team Performance  
6 In Progress Documents

Update Team Information



Review Outside Employment Req

Record Administrative Actions  
ORACLE  
PEOPLESOFT

# Lesson 3: Involuntary Separation Continued

## 3. Select Terminate Employee.

The screenshot displays the 'Update Team Information' page in a web application. On the left sidebar, the 'Terminate Employee' option is highlighted with a red border. The main content area is titled 'Request Leave of Absence' and includes a 'Search Options' section. Below this is a 'Select Employee' section with a table listing two employees. The table has three columns: 'Name / Title / ID - Record', 'Directs / Total', and 'Status / Type'. The first employee is ALeroy ABlake, a Bus Maint Tech with ID A0208472 - 0, whose status is 'Leave of Absence Employee'. The second employee is APaul AVillaverde, a Police Sergeant with ID A0031761 - 0, whose status is 'Active Employee'. Both rows have a right-pointing arrow icon.

Name / Title / ID - Record	Directs / Total	Status / Type
 ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
 APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

# Lesson 3: Involuntary Separation Continued

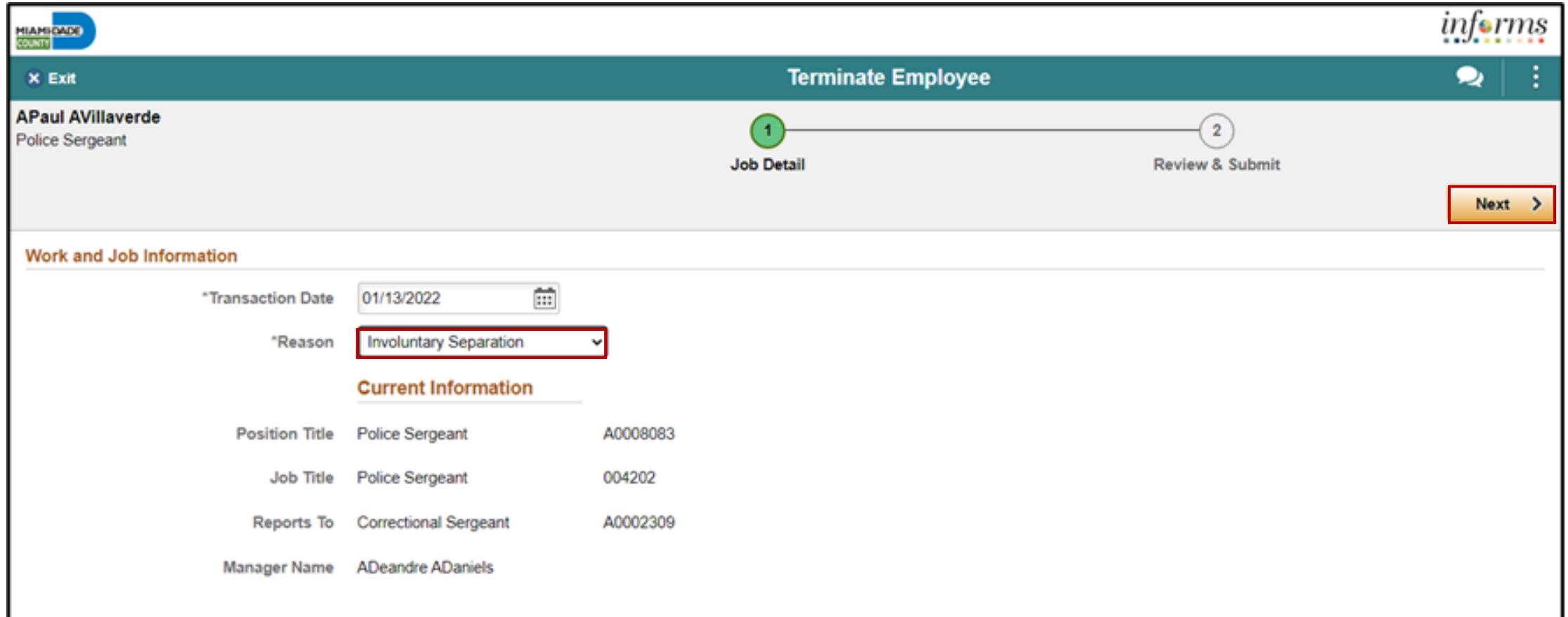
4. Select an employee to terminate.

The screenshot displays the 'Terminate Employee' interface. On the left is a sidebar with navigation options: Request Leave of Absence, Request Paid Leave of Absence, Request Return from Leave, Retire Employee, and Terminate Employee (highlighted). The main area has a header 'Update Team Information' and a 'Search Options' section. Below is a 'Select Employee' section with a table of 2 rows. The second row is highlighted in yellow and has a red border. A 'Select Employee' button is located below the highlighted row.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031761 - 0		Active Employee

# Lesson 3: Involuntary Separation Continued

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



**MIAMI DADE COUNTY** informs


× Exit Terminate Employee ⋮

APaul AVillaverde  
Police Sergeant

1 ————— 2  
Job Detail ————— Review & Submit

**Next** >

**Work and Job Information**

\*Transaction Date  

\*Reason Involuntary Separation ▼

**Current Information**

Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

# Lesson 3: Involuntary Separation Continued

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

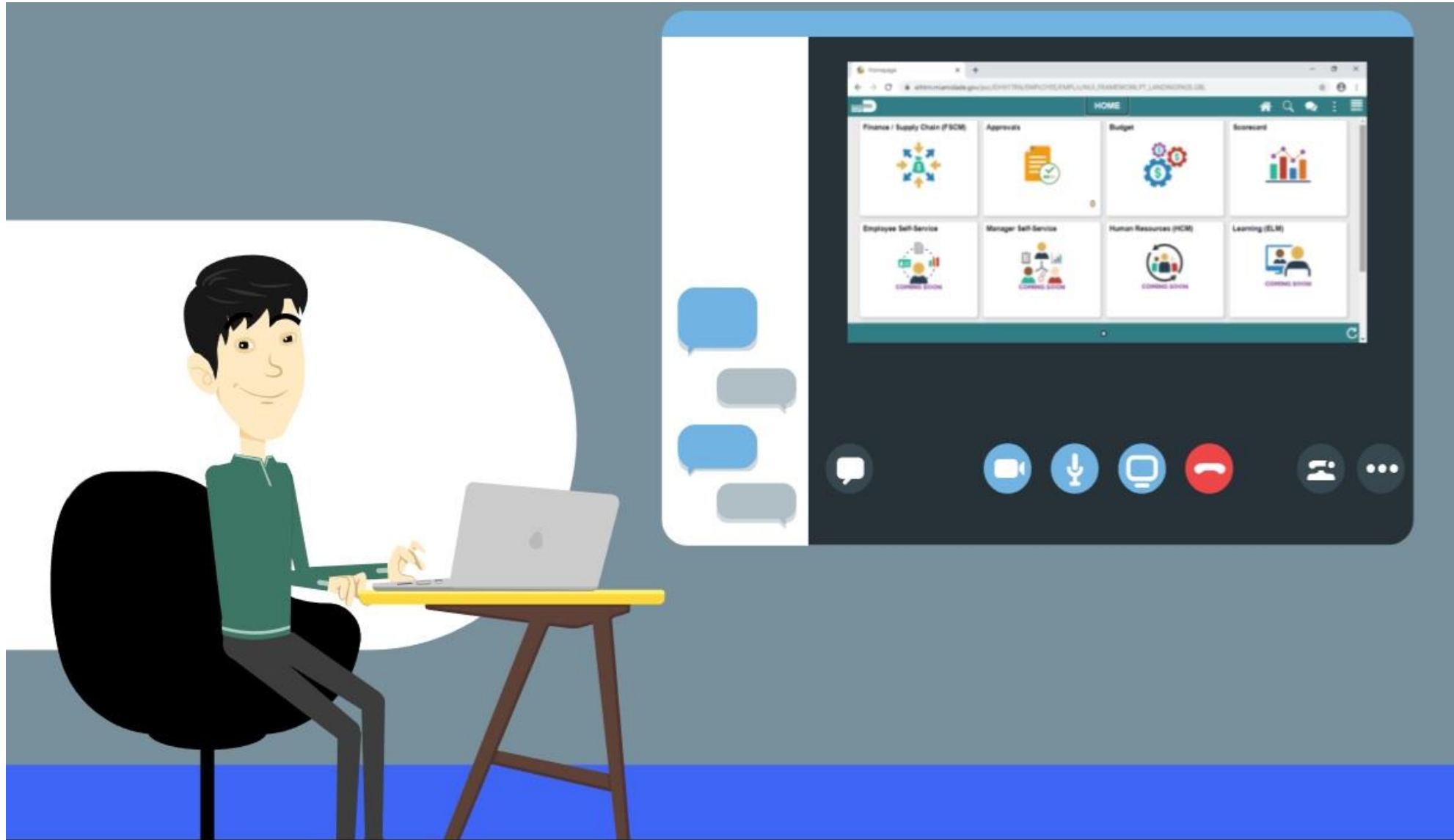
The screenshot shows a web application interface for terminating an employee. At the top left is the Miami-Dade County logo, and at the top right is the 'informs' logo. The main header is 'Terminate Employee' with an 'Exit' button on the left. Below the header, the employee's name 'APaul AVillaverde' and title 'Police Sergeant' are displayed. A progress bar shows two steps: '1 Job Detail' and '2 Review & Submit', with the second step being active. Navigation buttons for '< Previous' and 'Submit' are on the right. The 'Review and Submit' section contains the following information:

Transaction Date	01/13/2022	
Reason	Involuntary Separation	
<b>Current Information</b>		
Position Title	Police Sergeant	A0008083
Job Title	Police Sergeant	004202
Reports To	Correctional Sergeant	A0002309
Manager Name	ADeandre ADaniels	

Below the information is a 'Comments' section with a large, empty text input field outlined in red.



# 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

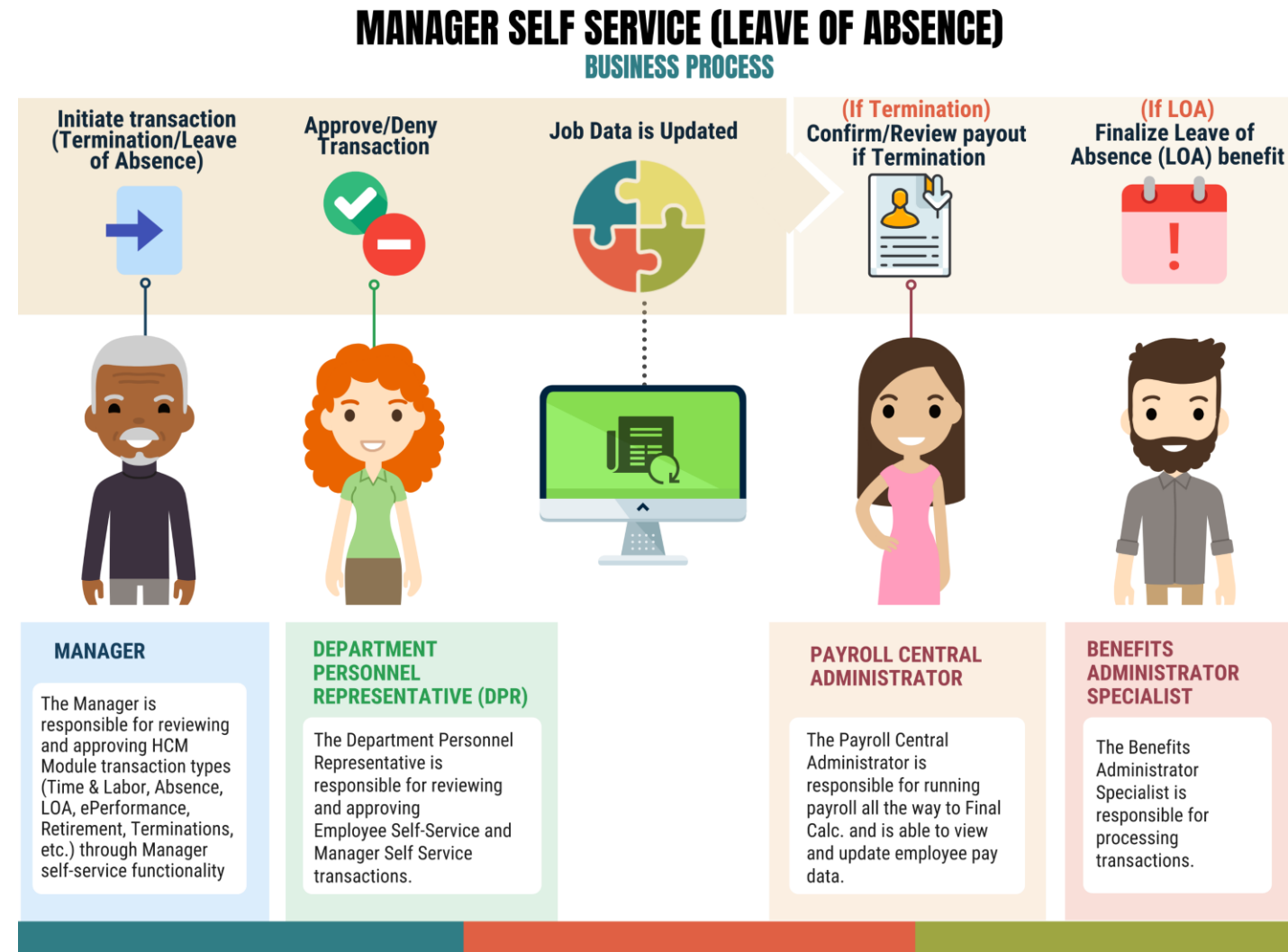
At the conclusion of this lesson, you will be able to:

- 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

## Leave of Absence

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

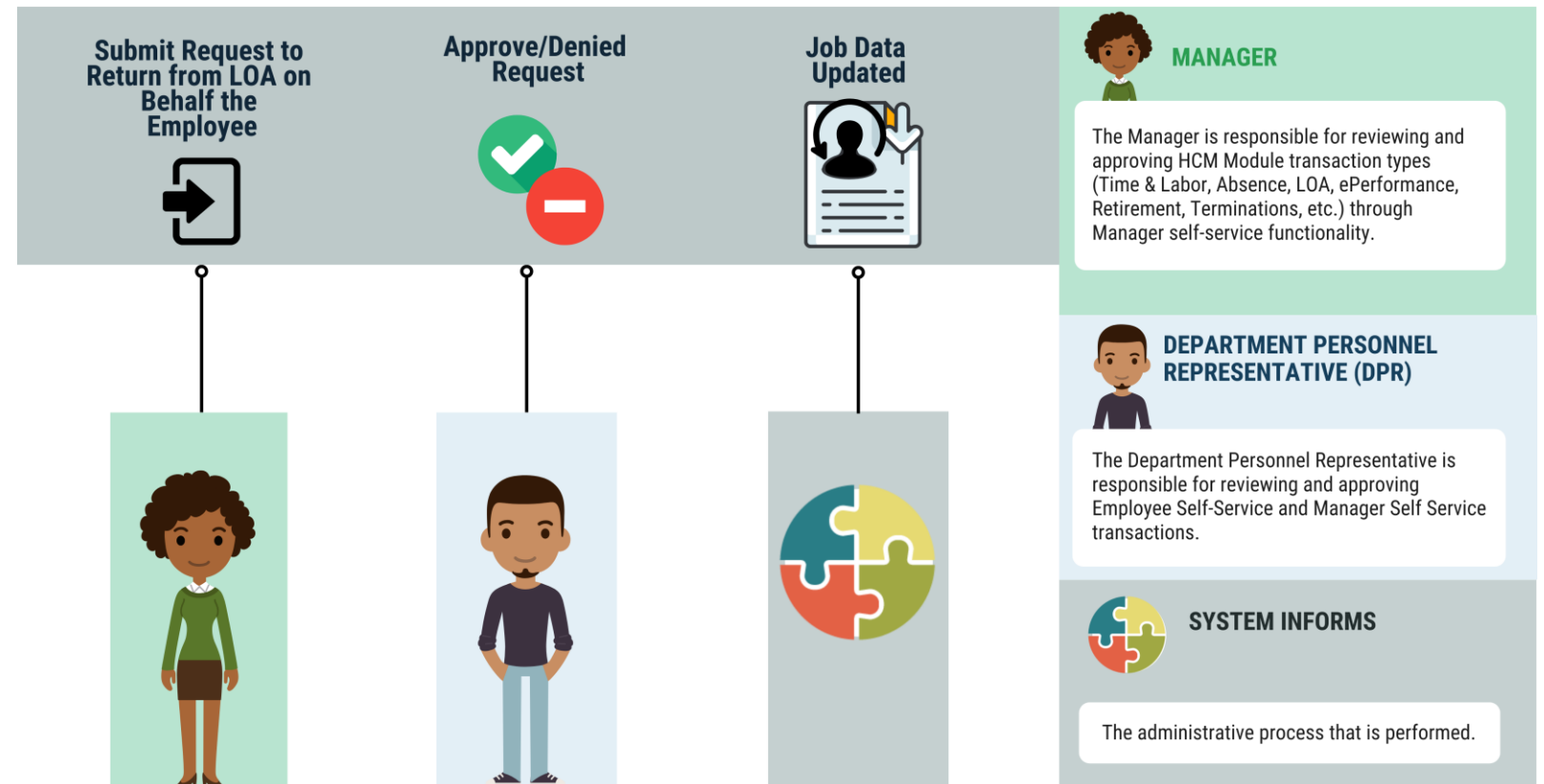


# Lesson 4: Requesting leave on behalf of Employee

## Return from Leave

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



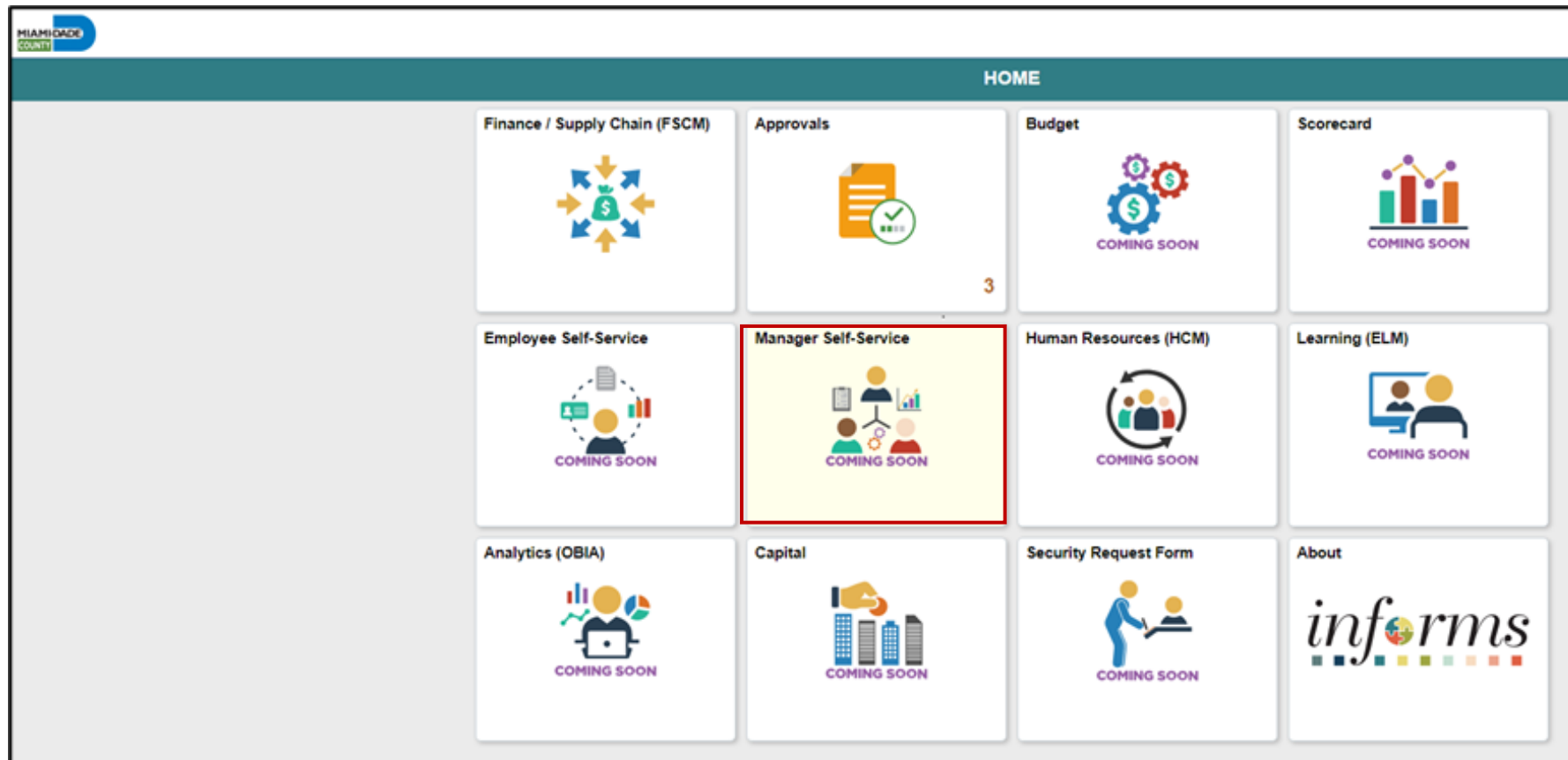
# Lesson 4: Key Terms

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

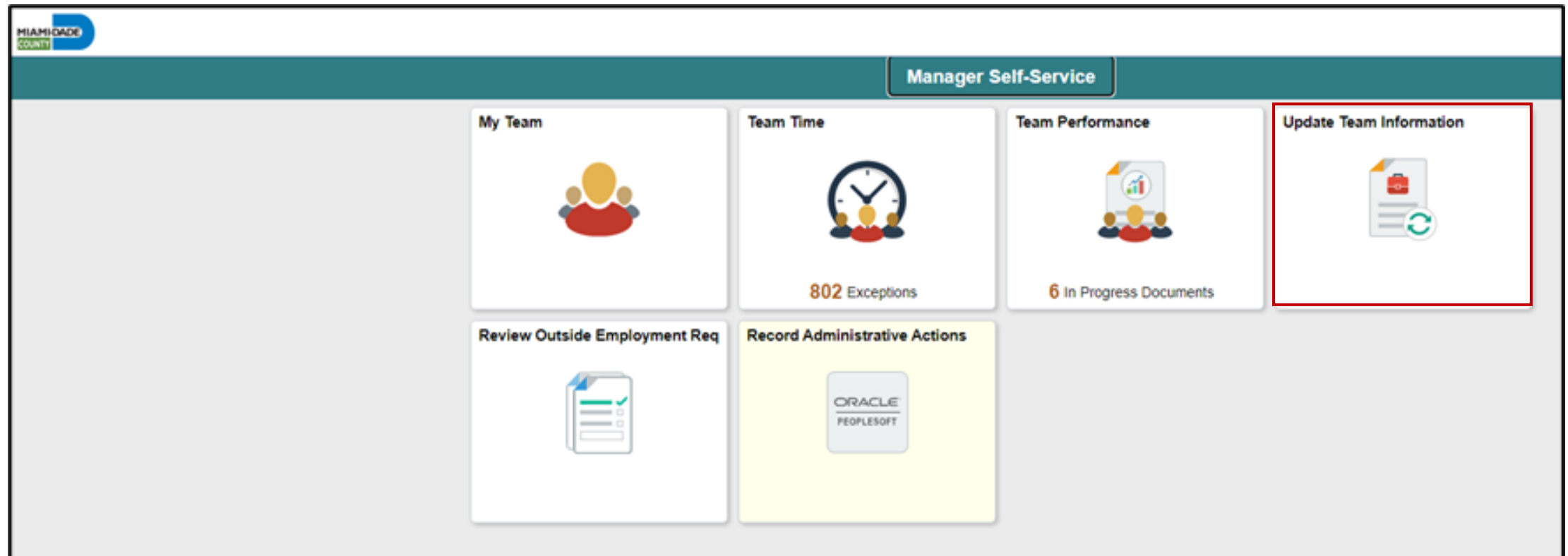
As a Manager, file for a leave of absence on behalf of an employee in INFORMS.

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.



The screenshot displays the 'Manager Self-Service' dashboard for Miami-Dade County. The dashboard features a teal header with the 'MIAMI-DADE COUNTY' logo on the left and the 'Manager Self-Service' title on the right. Below the header, there are six main dashboard tiles arranged in two rows. The top row includes 'My Team', 'Team Time' (showing 802 Exceptions), 'Team Performance' (showing 6 In Progress Documents), and 'Update Team Information' (highlighted with a red border). The bottom row includes 'Review Outside Employment Req' and 'Record Administrative Actions' (which features the Oracle PeopleSoft logo).



# Lesson 4: Requesting leave on behalf of Employee Continued

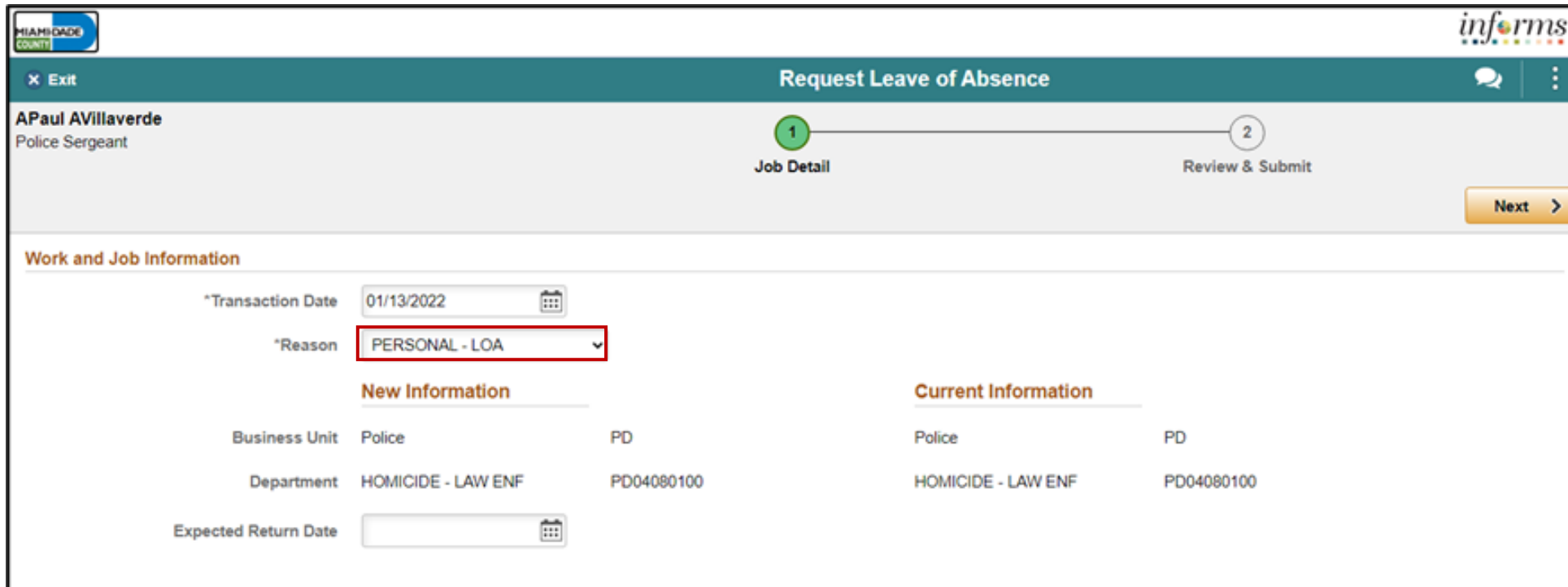
3. Select an employee who is requesting a leave of absence.

The screenshot displays a web application interface for 'Request Leave of Absence'. The top navigation bar includes a 'Back' button and the title 'Update Team Information'. A sidebar on the left lists various actions: 'Request Leave of Absence', 'Request Paid Leave of Absence', 'Request Return from Leave', 'Retire Employee', and 'Terminate Employee'. The main content area is titled 'Request Leave of Absence' and contains a 'Search Options' section. Below this is a 'Select Employee' section with a table listing two employees. The second employee, 'APaul AVillaverde', is highlighted in yellow, indicating selection. A 'Select Employee' button is located at the bottom of the table.

Name / Title / ID - Record	Directs / Total	Status / Type
ALeroy ABlake Bus Maint Tech A0208472 - 0		Leave of Absence Employee
APaul AVillaverde Police Sergeant A0031781 - 0		Active Employee

# Lesson 4: Requesting leave on behalf of Employee Continued

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



**Request Leave of Absence**

APaul AVillaverde  
Police Sergeant

1 Job Detail | 2 Review & Submit

Next >

**Work and Job Information**

\*Transaction Date: 01/13/2022

\*Reason: PERSONAL - LOA

**New Information**

Business Unit	Police	PD
Department	HOMICIDE - LAW ENF	PD04080100

Expected Return Date: [ ]

**Current Information**

Police	PD
HOMICIDE - LAW ENF	PD04080100

# 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**.

**MIAMI-DADE COUNTY** *informs*

[Exit](#) **Request Leave of Absence**

APaul AVillaverde  
Police Sergeant

1 Job Detail 2 Review & Submit

**Next >**

**Work and Job Information**

\*Transaction Date

\*Reason

**New Information** **Current Information**

Business Unit	Police	PD	Police	PD
Department	HOMICIDE - LAW ENF	PD04080100	HOMICIDE - LAW ENF	PD04080100

**Expected Return Date**

● Changes Made  
\* Required Field

MIAMI-DADE COUNTY

# Lesson 4: Requesting leave on behalf of Employee Continued

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

**Request Leave of Absence**

APaul AVillaverde  
Police Sergeant

1 Job Detail 2 Review & Submit

< Previous Submit

**Review and Submit**

Transaction Date 01/13/2022  
Reason PERSONAL - LOA  
Expected Return Date 01/31/2022

New Information		Current Information	
Business Unit	Police PD	Police	PD
Department	HOMICIDE - LAW ENF PD04080100	HOMICIDE - LAW ENF	PD04080100

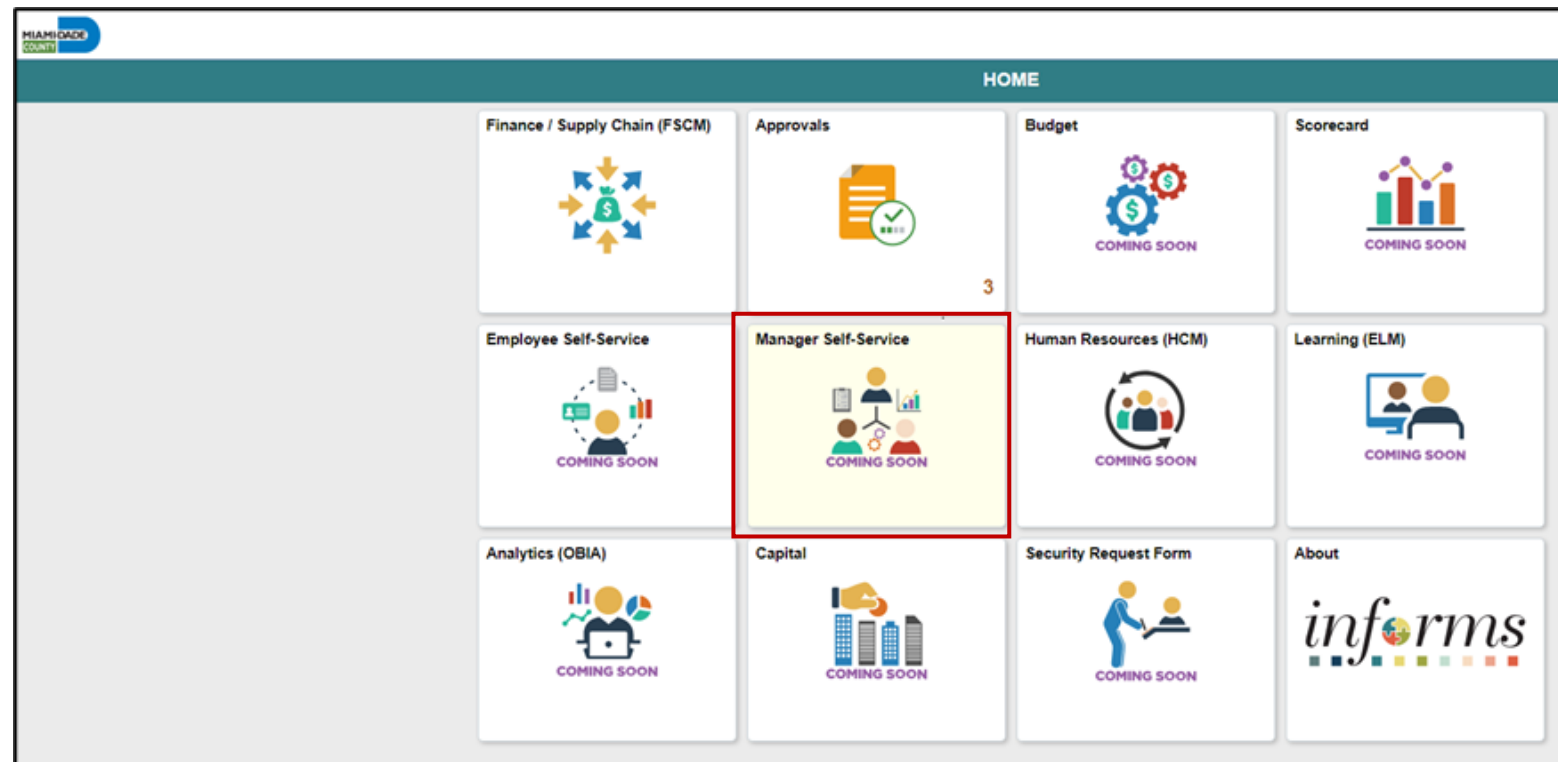
**Comments**

# 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.

The screenshot displays the 'Manager Self-Service' interface. At the top left is the 'MIAMI DADE COUNTY' logo. A teal header bar contains the text 'Manager Self-Service'. Below this, there are six main menu items arranged in a grid:

- My Team**: Represented by an icon of three stylized people.
- Team Time**: Represented by a clock icon, with the text '802 Exceptions' below it.
- Team Performance**: Represented by a document icon with a bar chart, with the text '6 In Progress Documents' below it.
- Update Team Information**: Represented by a document icon with a refresh symbol, and this entire tile is highlighted with a red border.
- Review Outside Employment Req**: Represented by a document icon with a checkmark.
- Record Administrative Actions**: Represented by the 'ORACLE PEOPLESFT' logo.

# Lesson 4: Requesting leave on behalf of Employee Continued

## 3. Select Request Return from Leave.



**Request Leave of Absence**

- Request Leave of Absence
- Request Paid Leave of Absence
- Request Return from Leave**
- Retire Employee
- Terminate Employee

**Request Leave of Absence**

Search Options



Select Employee

Name / Title / ID - Record	Directs / Total	Status / Type
 <b>ALeroy ABlake</b> Bus Maint Tech A0208472 - 0		Leave of Absence Employee
 <b>APaul AVillaverde</b> Police Sergeant A0031761 - 0		Active Employee

# Lesson 4: Requesting leave on behalf of Employee Continued

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

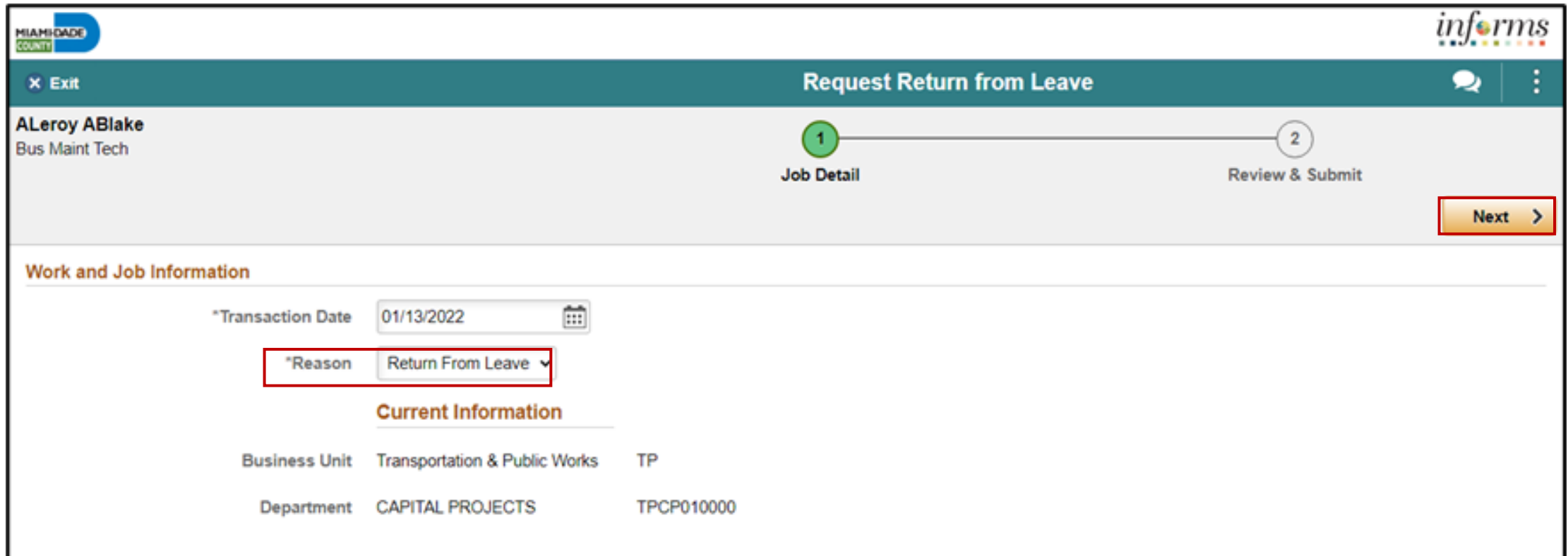
The screenshot displays the 'Request Return from Leave' interface. On the left is a sidebar with navigation options: 'Request Leave of Absence', 'Request Paid Leave of Absence', 'Request Return from Leave' (highlighted), 'Retire Employee', and 'Terminate Employee'. The main area has a header 'Update Team Information' and a sub-header 'Request Return from Leave'. Below this is a 'Search Options' section and a 'Select Employee' section. A table lists two employees:

Name / Title / ID - Record	Directs / Total	Status / Type
 A Leroy A Blake Bus Maint Tech A0208472 - 0	<input type="button" value="Select Employee"/>	Leave of Absence Employee
 A Paul AVillaverde Police Sergeant A0031761 - 0		Active Employee



# Lesson 4: Requesting leave on behalf of Employee Continued

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



MIAMI DADE COUNTY

informs

Exit Request Return from Leave

ALeroy ABlake  
Bus Maint Tech

1 Job Detail 2 Review & Submit

Next >

Work and Job Information

\*Transaction Date 01/13/2022

\*Reason Return From Leave

Current Information

Business Unit Transportation & Public Works TP

Department CAPITAL PROJECTS TPCP010000

# Lesson 4: Requesting leave on behalf of Employee Continued

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

MIAMI-DADE COUNTY

informs

Exit

### Request Return from Leave

1 Job Detail

2 Review & Submit

< Previous

Submit

#### Review and Submit

Transaction Date 01/13/2022

Reason Return From Leave

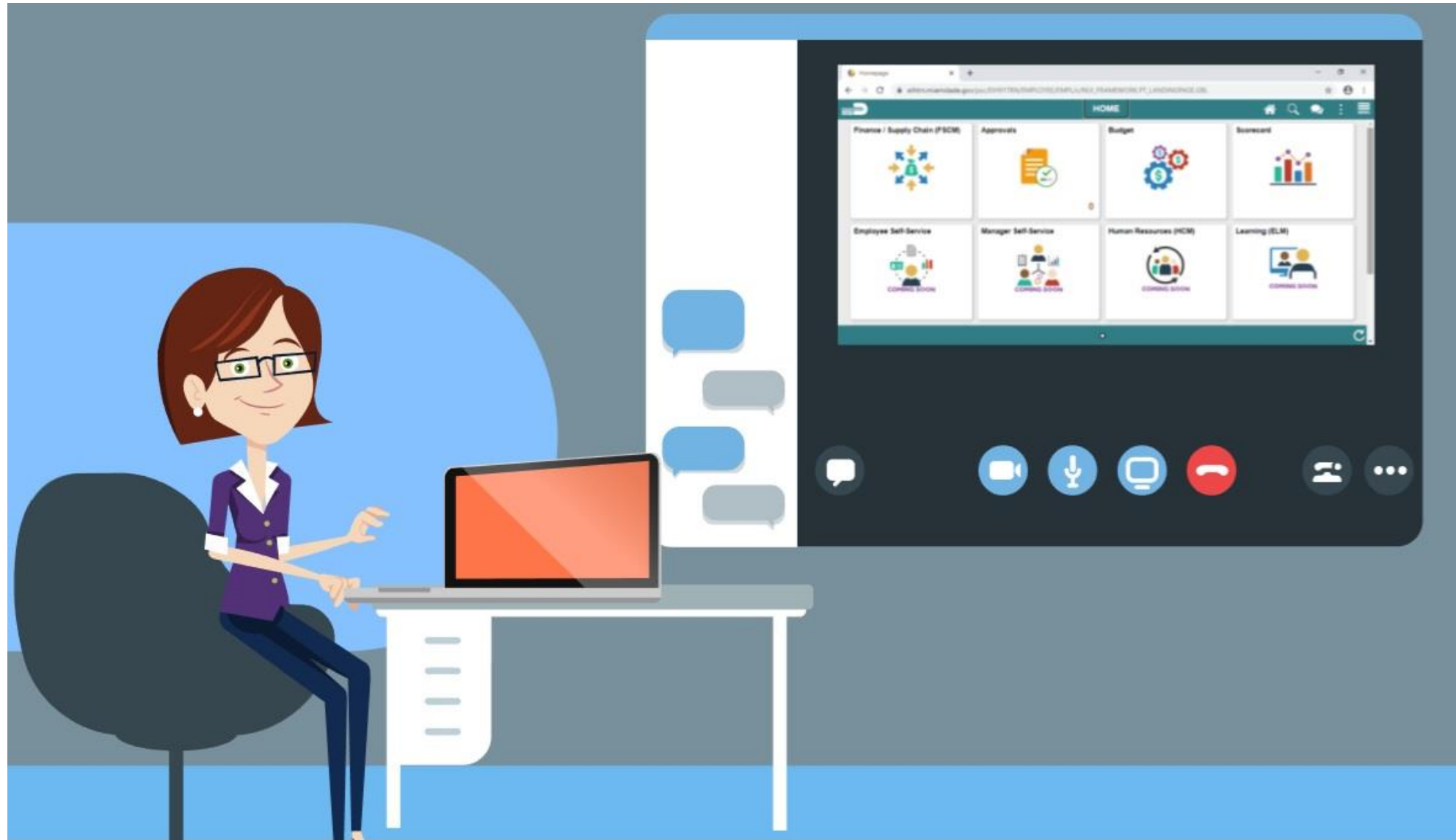
#### Current Information

Business Unit Transportation & Public Works TP

Department CAPITAL PROJECTS TPCP010000

#### Comments

# 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](http://www.miamidade.gov/informs)



**CONGRATULATIONS**

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

**MSS 206 – Manager Self Service - Updating Team Information**