Online Tools for Supervisors

User Guide

City of Minneapolis
Human Resources – Training and Development
August 2010

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CityTalk Resources

Lesson Objectives:

Upon completion of this lesson, you will be able to:

- Access Human Resources - Manager and Supervisor Tools and Templates
- Access the HRIS Information Center Job Aids

Human Resources – Manager and Supervisor

Managers and Supervisors play a key role working with and through others to accomplish the work of the City of Minneapolis.

The Human Resources webpages (http://citytalk/human-resources/manager-supervisor-home.asp) were designed to provide you with a "one-stop" site containing human resources information, guidelines, links, and forms you need to assist in your everyday work as a manager or supervisor. In addition, these pages are organized and designed around the Employment Life Cycle:

1) Hiring

Hiring employees is one of the most important decisions you will make as a hiring manager. Thus understanding the hiring process being an active partner with Human Resources during the process can lead to a more qualified and diverse applicant pool, a more effective selection process and ultimately a successful hire resulting in an effective and productive employee.

Working closely with members of your HR Generalist Team can also lead to a higher quality and diverse applicant pool as well as more timely selection and hiring. Hiring the right team can enable you, your department and the City of Minneapolis achieve its Goals, objectives and plans outlined in the City's Strategic Direction and department business plans.

2) Developing and Retaining

As a City Supervisor or Manager, part of your responsibilities is to provide development opportunities for your employees. The City's Training and Development Team offers a wide range of free, high quality opportunities that are customized to suit the City environment and its employees as another benefit available to them. Together with the services of the Human Resource Generalist teams, the City's Managers and Supervisors have access to a wealth of quality resources to foster employee development and retention. The following links offer information and tools for managers and supervisors to develop and retain productive employees.

"The number one reason employees quit their jobs is dissatisfaction with their supervisors, not their paychecks." *Georgia Reitmeier, Society for HR Management White Paper*

Research consistently shows that the lack of development opportunities is one of the top 10 reasons employees leave an organization.

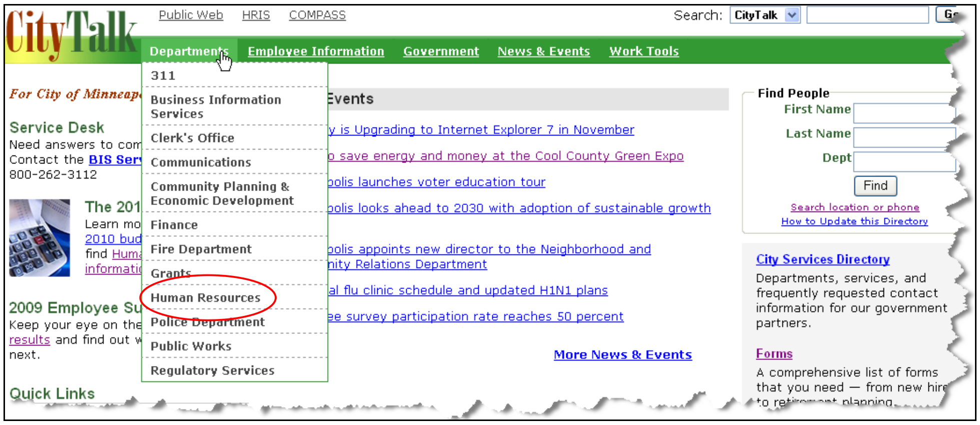
3) Separating from the City

Provides managers and supervisors with background information about employee separations including types of separations, the form(s) that are needed to finalize the separation and links to other resources that may assist you with the employee separation process.

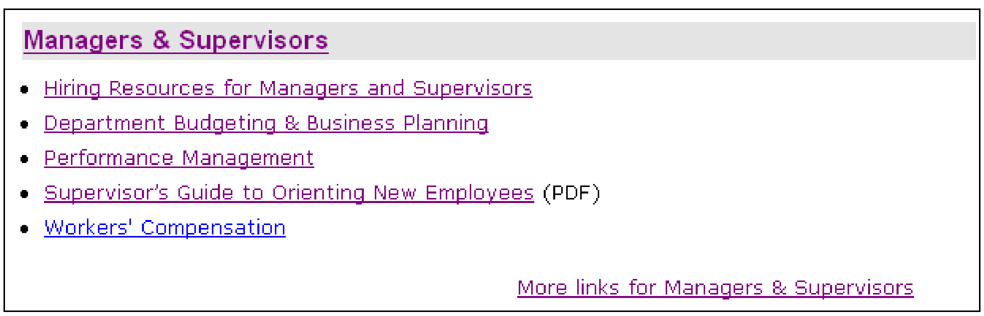
Access Manager and Supervisor Resources

1) Navigate to **Departments** on the green navigation bar**.**

2) Click on **Human Resources** from the dropdown list.

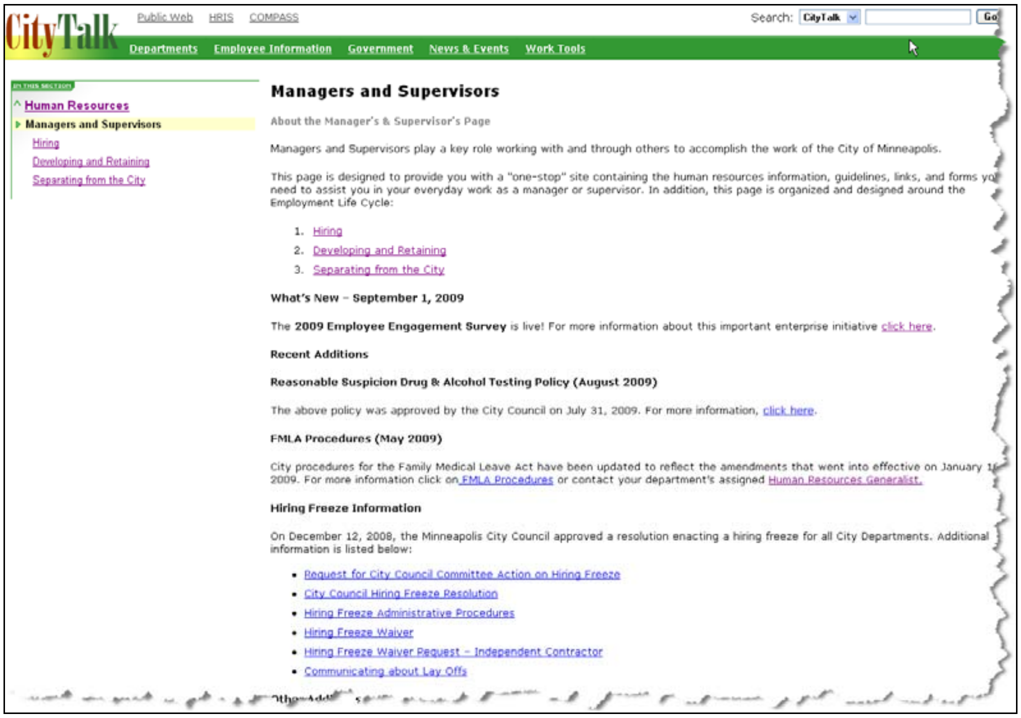


3) On the **Human Resources** page, click the Managers & Supervisors link.



NOTE: *You can click on one of the most commonly used links directly from this screen or continue to the Managers & Supervisors webpage.*

4) The **Managers and Supervisors** page will be displayed.



HRIS Information Center

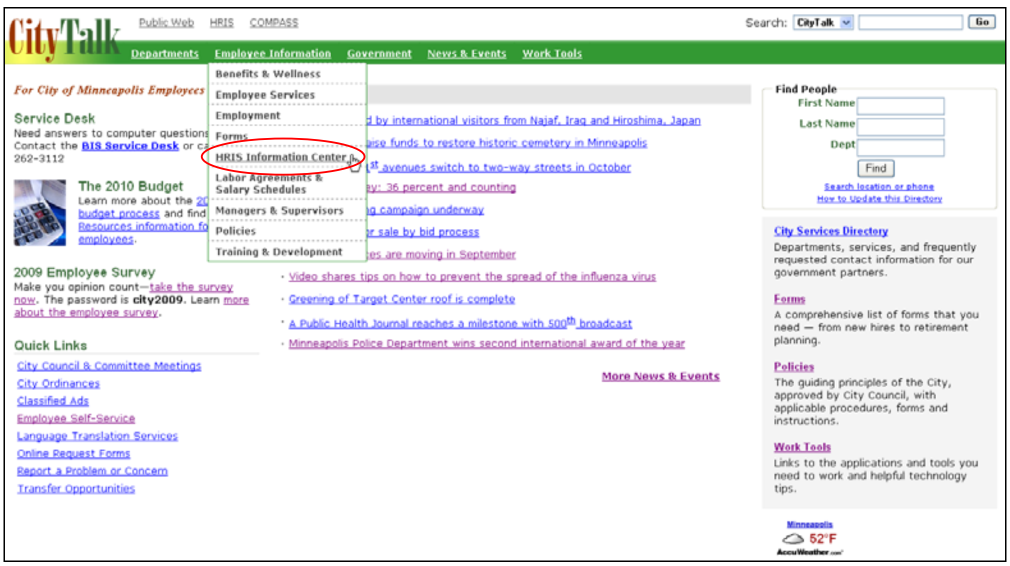
The HRIS Information Center is the place to find user guides and help documents on the Human Resources Information System.

Most departments have a designated HRIS Representative (http://citytalk/hris/hris_dept_reps.xls) who is responsible for maintaining and updating employee 'job' related data in HRIS.

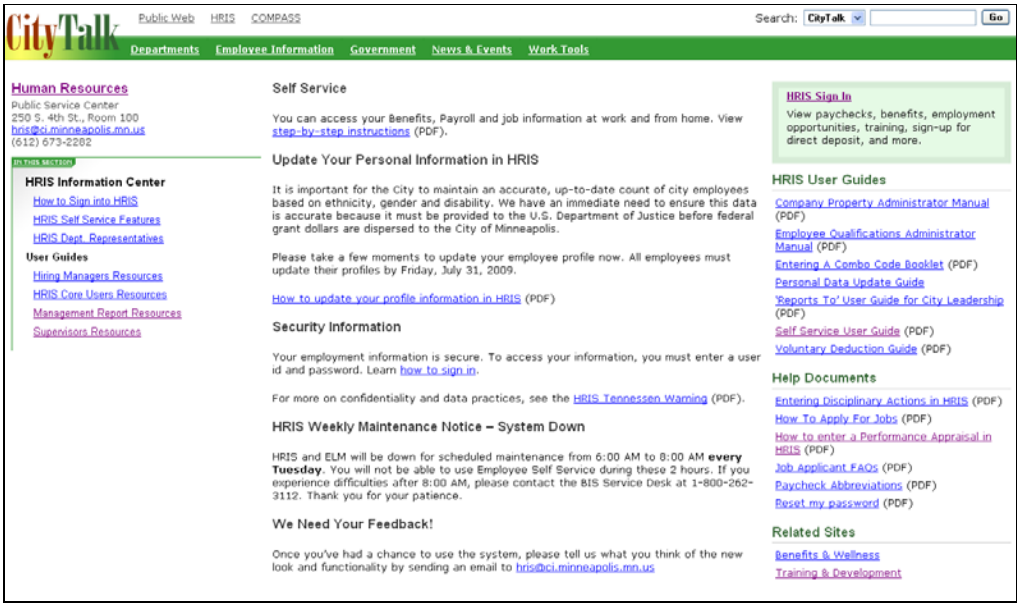
Access HRIS Information Center

1) Navigate to **Employee Information** on the green navigation bar.

2) Click on **HRIS Information Center** from the drop down list



3) The **HRIS Information Center** page will be displayed.


CityTalk
Public Web
HRIS
COMPASS
Search: CityTalk
Go
Departments
Employee Information
Government
News & Events
Work Tools
Human Resources
Public Service Center
250 S. 4th St., Room 100
hris@ci.minneapolis.mn.us
(612) 673-2282
IN THIS SECTION
HRIS Information Center
How to Sign into HRIS
HRIS Self Service Features
HRIS Dept. Representatives
User Guides
Hiring Managers Resources
HRIS Core Users Resources
Management Report Resources
Supervisors Resources
Self Service
You can access your Benefits, Payroll and job information at work and from home. View step-by-step instructions (PDF).
Update Your Personal Information in HRIS
It is important for the City to maintain an accurate, up-to-date count of city employees based on ethnicity, gender and disability. We have an immediate need to ensure this data is accurate because it must be provided to the U.S. Department of Justice before federal grant dollars are dispersed to the City of Minneapolis.
Please take a few moments to update your employee profile now. All employees must update their profiles by Friday, July 31, 2009.
How to update your profile information in HRIS (PDF)
Security Information
Your employment information is secure. To access your information, you must enter a user id and password. Learn how to sign in.
For more on confidentiality and data practices, see the HRIS Tennessen Warning (PDF).
HRIS Weekly Maintenance Notice – System Down
HRIS and ELM will be down for scheduled maintenance from 6:00 AM to 8:00 AM every Tuesday. You will not be able to use Employee Self Service during these 2 hours. If you experience difficulties after 8:00 AM, please contact the BIS Service Desk at 1-800-262-3112. Thank you for your patience.
We Need Your Feedback!
Once you've had a chance to use the system, please tell us what you think of the new look and functionality by sending an email to hris@ci.minneapolis.mn.us
HRIS Sign In
View paychecks, benefits, employment opportunities, training, sign-up for direct deposit, and more.
HRIS User Guides
Company Property Administrator Manual (PDF)
Employee Qualifications Administrator Manual (PDF)
Entering A Combo Code Booklet (PDF)
Personal Data Update Guide
'Reports To' User Guide for City Leadership (PDF)
Self Service User Guide (PDF)
Voluntary Deduction Guide (PDF)
Help Documents
Entering Disciplinary Actions in HRIS (PDF)
How To Apply For Jobs (PDF)
How to enter a Performance Appraisal in HRIS (PDF)
Job Applicant FAQs (PDF)
Paycheck Abbreviations (PDF)
Reset my password (PDF)
Related Sites
Benefits & Wellness
Training & Development

Supervisor Webpage Resources

Resource	Navigation Path
Civil Service Rules	Departments > Human Resources > Civil Service Rules
Department Business Plans	Government > Results Minneapolis > Department Business Plans
Hiring (Templates and Tools)	Employee Information > Managers & Supervisors > Hiring **-or-** Departments > Human Resources > Managers & Supervisors > Hiring
HR Generalists	Departments > Human Resources > HR Generalists
HRIS Dept Rep	Employee Information > HRIS Information Center > HRIS Dept. Representatives
HRIS Information Center	Employee Information > HRIS Information Center
Job Change Form	Forms > Job Change
Labor Agreements	Employee Information > Labor Agreements and Salary Schedules > Labor Agreements **-or-** Departments > Human Resources > Employee Services > Labor Relations
Performance Management (Templates and Tools)	Departments > Human Resources > Performance Management (under Managers & Supervisors) **-or-** Employee Information > Managers & Supervisors > Developing & Retaining > Performance Management
Results Minneapolis Department Reports	Government > Results Minneapolis > Department Reports
Supervisor's Checklist - Separating from the City	Departments > Human Resources > Managers & Supervisors > Separating from the City > Supervisors' Checklist
Supervisor's Guide to FMLA	Policies > Family & Medical Leave Act (FMLA 1993) Resources for Supervisors > Supervisor's Guide to FMLA **-or-** Departments > Human Resources > Managers & Supervisors > FMLA Procedures > Supervisor's Guide to FMLA
Supervisor's Guide to Orienting New Employees	Departments > Human Resources > Supervisor's Guide to Orienting New Employees (under Managers & Supervisors)
Training & Development	Employee Information > Training & Development **-or-** Departments > Human Resources > Training & Development

HRIS

Lesson Objectives:

Upon completion of this lesson, you will be able to:

- Understand HRIS Functionality & Security Measures
- Navigate the Management Center and Manager Self Service
- Utilize and Manage a Worklist
- Utilize Job Data Information
- Run Management Reports
- Update Reports To
- Enter a Performance Review Status
- Review Accrual Balances

HRIS Overview

HRIS (Human Resource Information System) is an internet-based application that enables the City to manage HR, payroll, and management functions. It is used by HR to store data and accomplish various activities:

- Employee Self Service
- Manager Self Service
- Learning and Development

Employee Self Service allows employees to view paychecks, administer direct deposit, request duplicate W-2 or change federal tax withholding information, maintain personal information (name, address, phone number, marital status) and to view benefits information.

Manager Self Service allows supervisors and managers to review employees' personal and job information, update position management (reports to information), and track employees' review status. It provides management a complete history of a given employee from the time of application through all promotions, evaluations, and wage increases.

Learning and Development enables the City to manage, track, deliver, and report on learning delivered to employees within or outside of the City. It is a single system for learners, managers, instructors, and administrators. HRIS Learning Management (HRIS-LM) is an internet-based application built within HRIS.

System Functionality & Security

The functionality that each employee will use depends on their role. Below are the roles the City has identified and what functions each role will have access to. Roles limit security access to specific HRIS areas.

Employees

- Review and update personal information
- Review pay and compensation history
- Update direct deposit and other deduction or contribution information
- Enroll and review health insurance, savings, pension plans or other benefits information
- Add or review information related to education and other qualifications including languages, licenses and certificates, memberships, honors and awards

- View and apply for career opportunities
- Create a new password

Employees with 1 or more Direct Reports

- Review employee job data
- Update ‘Reports To’
- View and enter employee performance appraisal status information
- View leave accrual details
- Access and update worklist
- Run management reports
  - Employee Listing
  - Position Management
  - Performance Appraisal Status Report
  - Required Learning – Respect in the Workplace
  - Required Learning – Ethics
- Review employee information related to education and other qualifications including languages, licenses and certificates, and memberships, honors and awards
- Review employee information related to company property and drivers license data

City Leadership

City Leadership is defined as Managers at a grade 11 or higher.

- All of the above
- Additional Management Reports
  - Company Property Issued Status
  - Driver’s License Status
  - Employee Turnover
  - Leave Usage and Balances
  - License/Certification Status

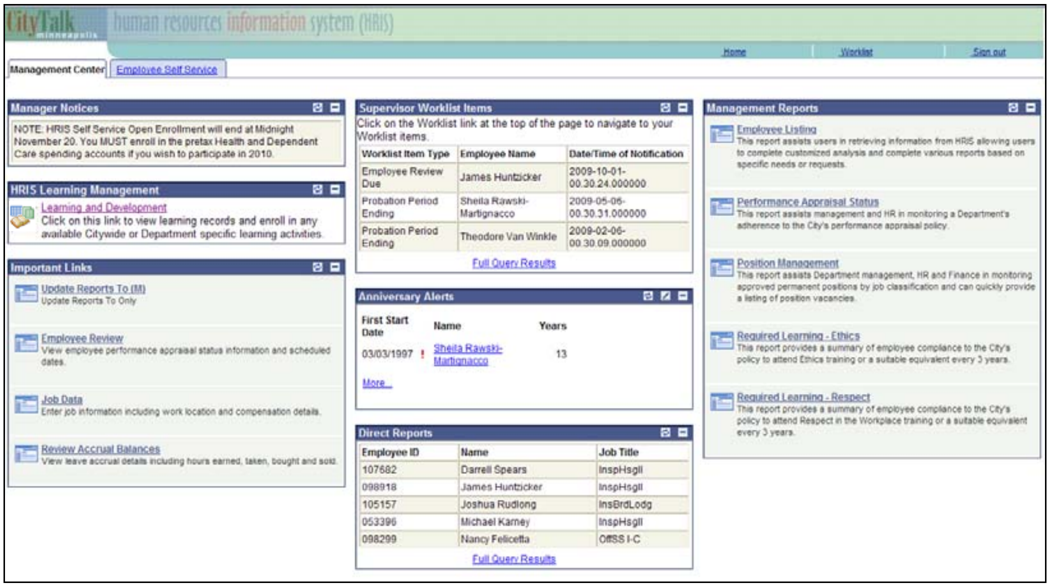
— Overtime Summary

— Retirement Eligibility

— Workforce Diversity Summary

Management Center

The Management Center portal page is utilized by department managers, HR generalists, and supervisors.



Management Center Sections

Manager Notices	Notices from Human Resources.
HRIS Learning Management	View learning records and enroll self in training. Immediate supervisors can view learning records and enroll direct reports in training.
Important Links	Commonly used pages in HRIS
Supervisor Worklist Items	HRIS “To Do” list.
Anniversary Alerts	Displays the anniversaries for your direct reports within the previous 5 days and the next 30 days. The employee’s First Start Date with the organization is used for the calculation
Direct Reports	List of your direct reports. ***NOTE:*** *To ensure information is current and real time data, access was granted on the request of departments to update “Reports To” information. Departments are responsible for deciding who reports to whom. The system only allows a direct report to report to* <u>*one*</u> *position.*

City Leadership and/or Hiring Managers may have the additional sections:

My Job Openings	Displays current Job Openings. ***NOTE:*** *Only 5 job openings are displayed at a time. Click on Full List to see all of your Job Openings.*
Management Reports	Interactive on-demand reports

Worklists

A Worklist is your HRIS "To Do" list. When an HR event requires your attention, you will receive a notification to take action on the HRIS Management Center. This notification or "To Do" item will remain until you mark it worked.

Some worklist items have a direct link to the HRIS page to complete the activity such as Employee Review.

Types of Worklist Items

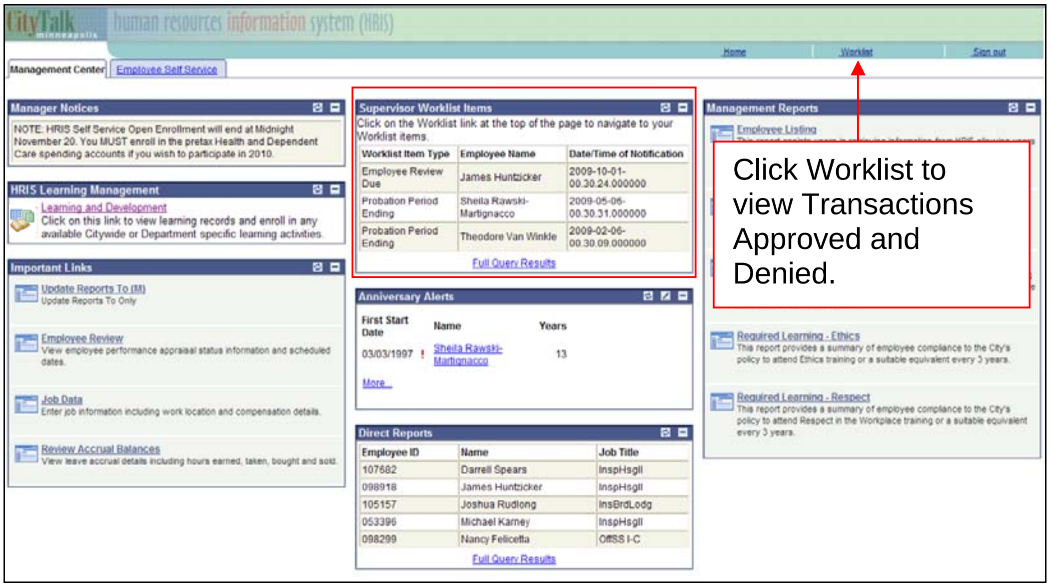
- Probation Period Ending
- Permit Ending
- Detail Assignment Ending
- Performance Appraisal Due
- License/Certification Expiring
- Drivers License Expiring

NOTE: *Step Increases are not listed under worklist items as they are a department specific process. Contact your HRIS Department Rep (http://citytalk/hris/hris_dept_reps.xls) for your department's process.*

View Worklist

A partial list (five worklist items) is shown in the middle of the Management Center page. For the full worklist, click on the Full Query Results link in the Supervisor Worklist Items box.

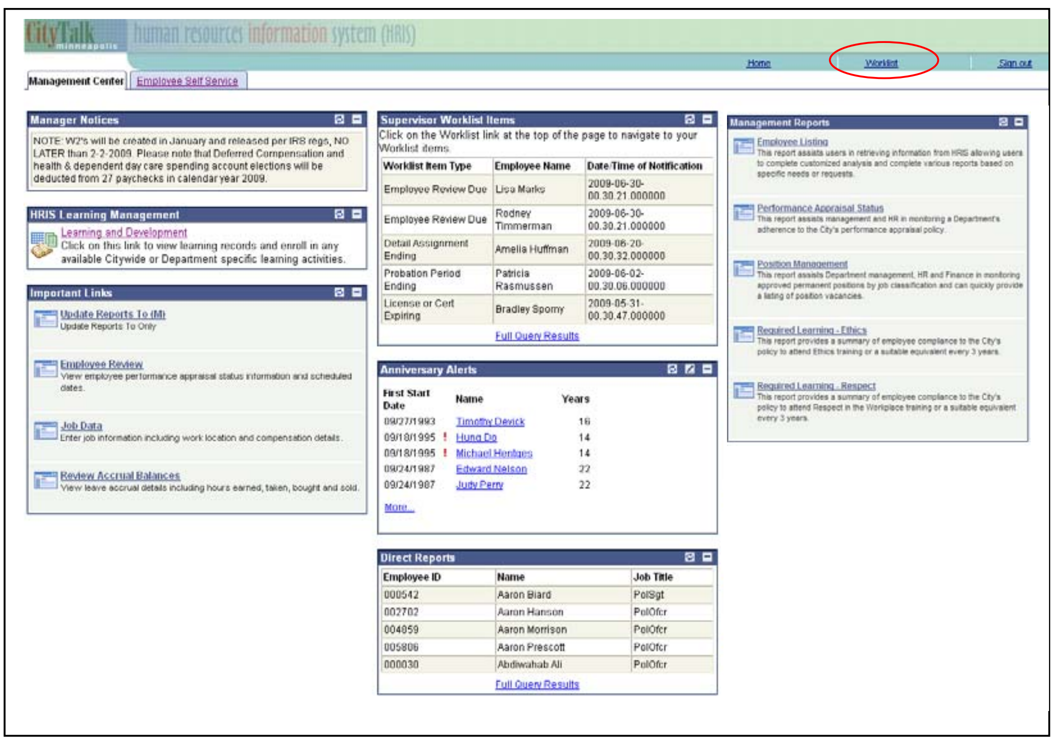
NOTE: *Full Query Results do not list Transactions Approved and Denied.*



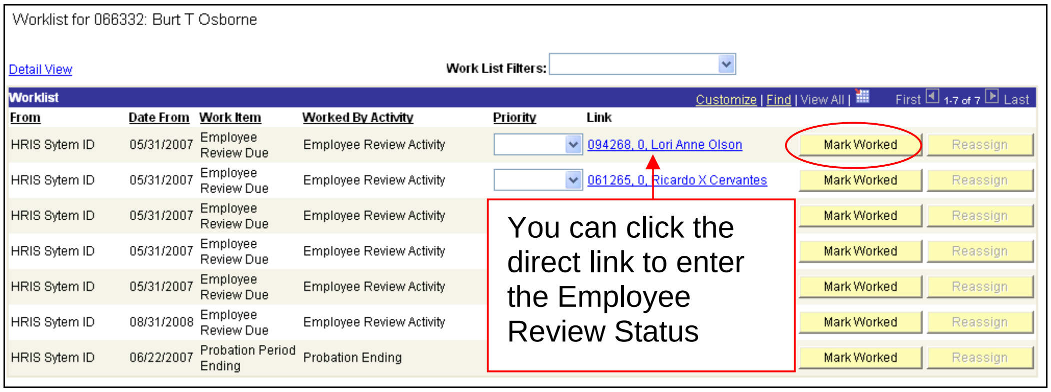
Mark Worklist

1) Navigate to **Management Center tab**.

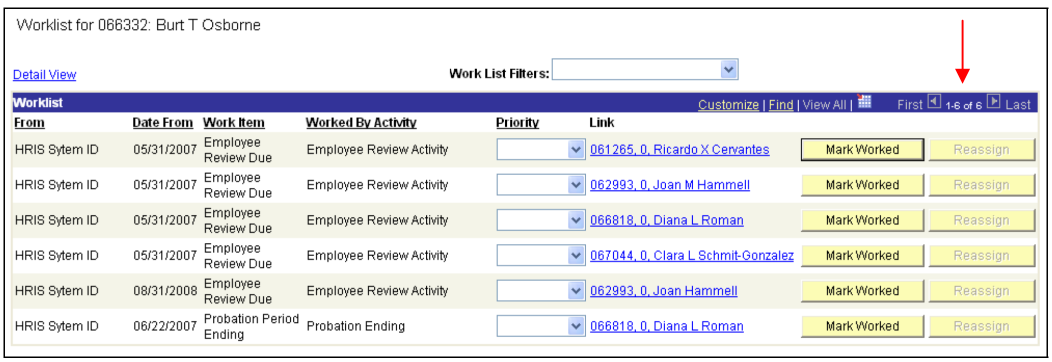
2) On the teal navigation header, click on the Worklist link (Worklist).



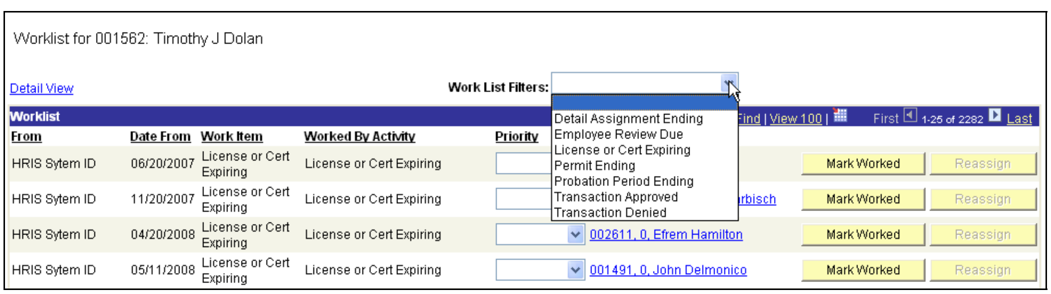
3) Locate the work item and employee to mark worked. Click on the Mark Worked button (Mark Worked).



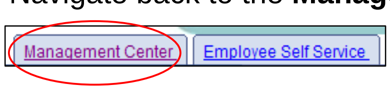
The worklist item is removed. (In this example, it changed from ‘1-7 of 7’ to ‘1-6 of 6’.)



NOTE: *You can narrow the worklist results by using the Work List Filters dropdown menu.*



4) Navigate back to the **Management Center tab**.



5) The worklist item will remain under **Supervisor Worklist Items** until you log out of the system or refresh the screen. Click the Refresh ( ) icon.

Supervisor Worklist Items

Click on the Worklist link at the top of the page to navigate to your Worklist items.

Worklist Item Type	Employee Name	Date/Time of Notification
Employee Review Due	Lisa Marks	2009-06-30-00.30.21.000000
Employee Review Due	Rodney Timmerman	2009-06-30-00.30.21.000000
Detail Assignment Ending	Amelia Huffman	2009-06-20-00.30.32.000000
Probation Period Ending	Patricia Rasmussen	2009-06-02-00.30.06.000000
License or Cert Expiring	Bradley Sporny	2009-05-31-00.30.47.000000

Full Query Results

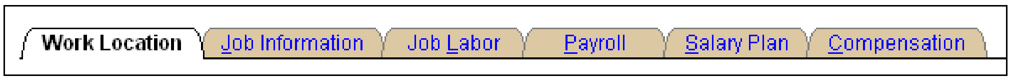
Job Data

Job data information pertains to an employee's specific job. Separate records are maintained in the system for each job an individual has held.   Employee record number "0" is the primary record where all benefits are tied.

HRIS uses effective dated rows. Effective dates tell you if the information is current, future dated or historical.

Job data includes information on position number, position title, department, 'reports to' information, and job code. These pages are especially useful for getting information needed to update the position management 'reports to" and to fill out the Employee Job Change Form (see Appendix A).

Job Data



Job Data Tabs – Key Information	
Work Location	Position Number and Position Title
Job Information	Reports To and FLSA status – Fair Labor Standards Act. Indicates if Exempt/Non Exempt Employee. Click on the **American Flag icon** USA to view the FLSA status
Job Labor	Employee's Union Code/Bargaining Unit – The other fields are not used by the City.
Payroll	Employee's Pay Group **CCE** = City Council Exception Employees. The system will automatically process a paycheck for any employee in this paygroup without a timesheet being submitted via *Time and Labor* **CCP** = City Council Positive Pay Employees (Detail, Temporary or Intermittent Employees). The system will not automatically process a paycheck for any employee in this paygroup; must be manually entered in *Time and Labor*.
Salary Plan	This page is used for HR purposes. The fields on this page are identifiers associated with wages.
Compensation	Compensation Rate **NAHRLY** = Base Rate **LNGCPE** = Longevity Pay

Not accessible – security limited to HR

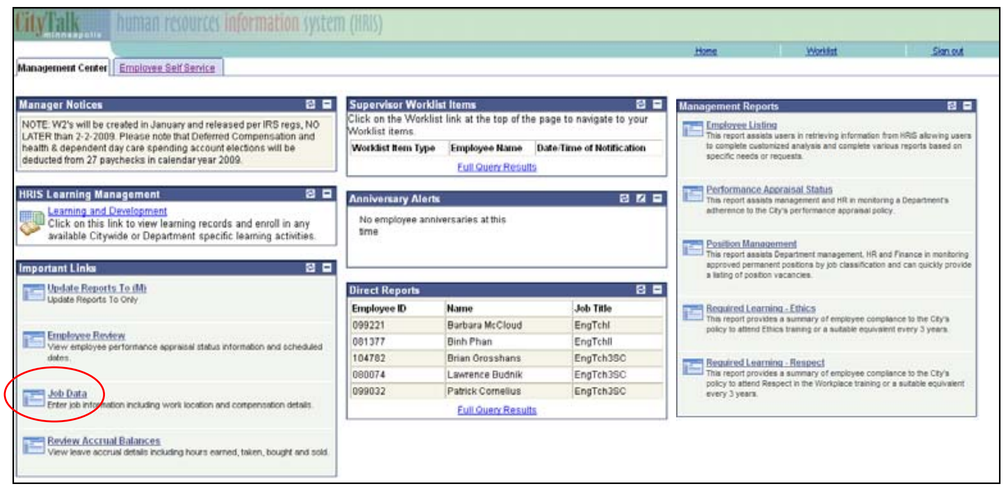
Job Data Employment Data Earnings Distribution Benefits Program Participation Classification Hours

Job Data Pages – Key Information	
Employment Data	Lists an employee's original start date and calculates years/month/days with the City. Professional Experience Date determines longevity pay and leave accrual rates.
Earnings Distribution	Determines where your salary is being charged and the funding string. Security access limited.

Look up Job Data

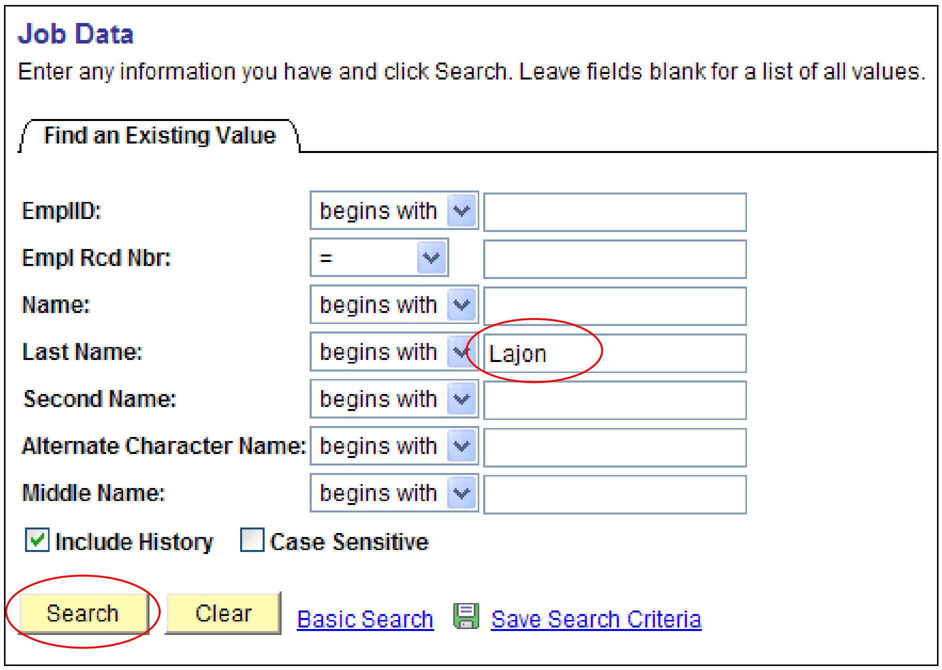
1) Navigate **Management Center tab**.

2) Under **Important Links**, click the Job Data link.



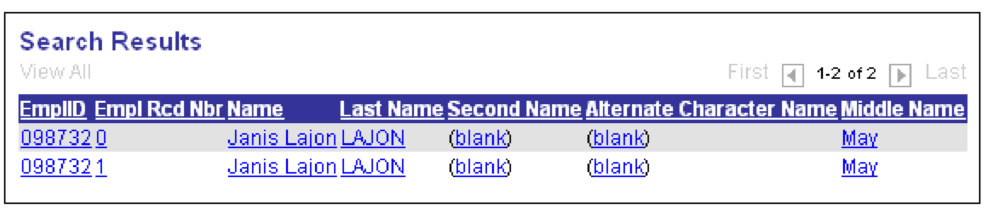
3) Type in the search criteria to find the employee you would like to pull job data information (e.g., Last Name) and click on the **Search** (Search) button.

NOTE: *If you search using the* ***Name*** *field, the format required is first name then last name (e.g., Jane Doe).*



NOTE: *To view the complete job data history, check the* ***Include History*** *box.*

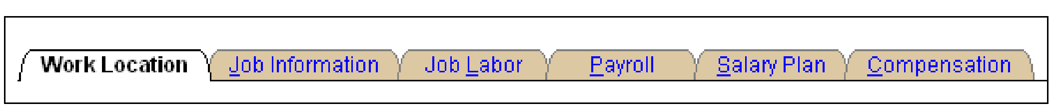
4) If there is only one record, the **Job Data** page will open. If there is more than one record, click on the employee's name with the Employee Record Number "0".



EmplID	Empl Rcd Nbr	Name	Last Name	Second Name	Alternate Character Name	Middle Name
098732	0	Janis Lajon	LAJON	(blank)	(blank)	May
098732	1	Janis Lajon	LAJON	(blank)	(blank)	May

NOTE: Additional record numbers indicate a person has been on detail or held a concurrent job.

5) Click on the desired tab.



Management Reports

Management reports are a way to gather information on your work unit. Reports available to you are dependent on your position and role in the city. You will only have access to the information for your Department.

It's important to note that the reports are considered private under the MN Government Data Practices Act and are to be used only for legitimate business reasons and workforce planning purposes. Distribution of the information within the report to individuals who do not have a legitimate need to know or have this information may pose a legal risk to you and the City of Minneapolis.

Features of Management Reports:

- Interactive and on-demand
- Data can be downloaded to Excel
- Most reports provide both employee detail and a graphical summary of the data

A full list of the Management Reports and potential uses can be found on the HRIS Information Center on CityTalk: http://citytalk/hris/management-reports.asp.

Types of Management Reports

If you have 1 or more direct reports, you can access	
Employee Listing	Assists users in retrieving information from HRIS allowing users to complete customized analysis and complete various reports based on specific needs or requests. Includes active, on leave or suspended employees.
Performance Appraisal Status Report	Assists management and HR in monitoring a Department's adherence to the City's performance appraisal policy. **Performance Appraisal statuses:** **Scheduled** – Appraisal due date is in future **Past Due** – Appraisal due date is in past **Completed** – Current period appraisal is completed **Waived** – Current period appraisal is not being completed and has been waived. This may be used in cases where the employee may have been on an extended leave of absence or transferred out of the department.

Position Management	Identifies vacant and filled permanent positions by job classification.
Required Learning – Respect in the Workplace	Provides a summary of employee compliance to the City's policy to attend Respect in the Workplace training or a suitable equivalent every 3 years.
Required Learning - Ethics	Provides a summary of employee compliance to the City's policy to attend Ethics training or a suitable equivalent every 3 years.

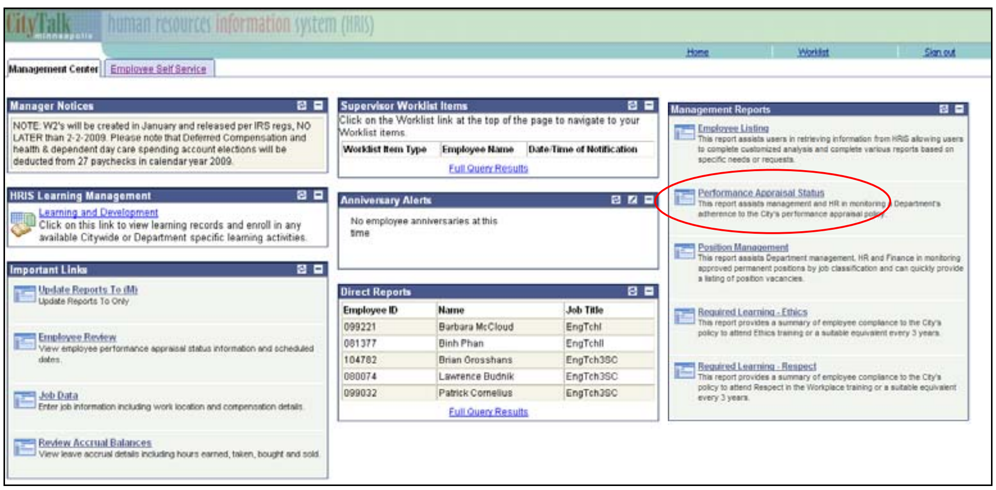
***NOTE:** Additional reports may be granted based on business needs.*

How to Run a Management Report

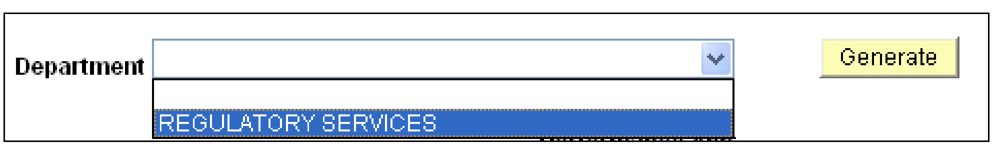
1) Navigate to **Management Center tab**.

2) Under **Management Reports**, click on the desired report name.

For this example, we will use the Performance Appraisal Status.



3) Click on the drop down arrow and select your department.

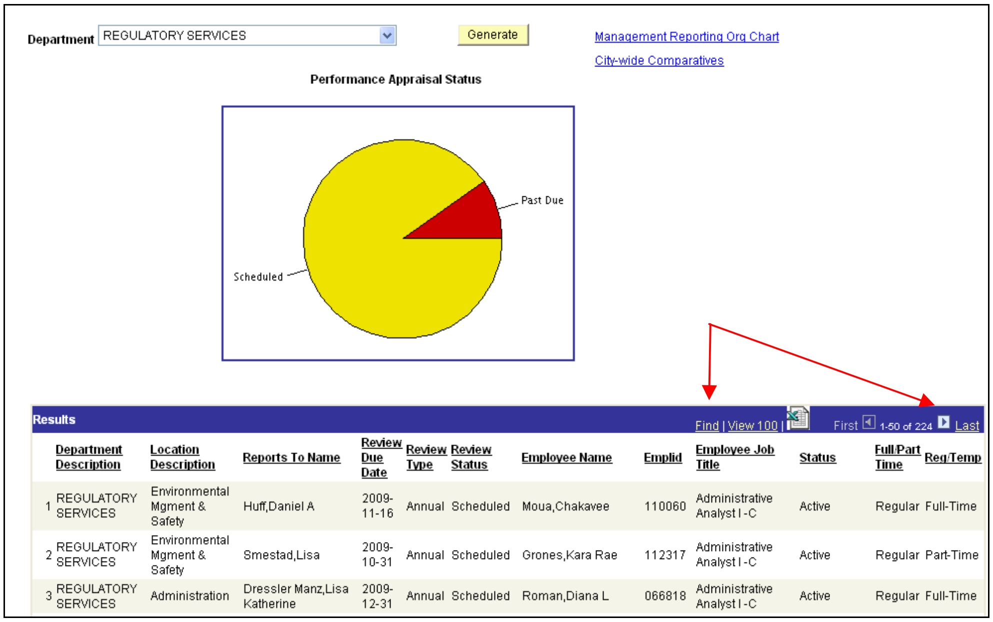


***NOTE:** The list of Departments available to a user is based on security. Most users are limited to view only data for the Departments they are assigned. In the example below, the user can only run reports for Regulatory Services.*

4) Click the **Generate** button (Generate).

5) Review results.

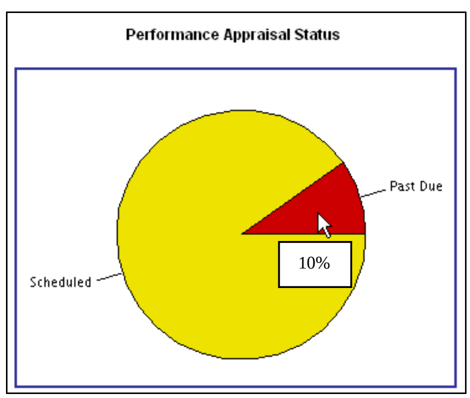
NOTE: *If results do not generate, turn off pop-up blocker under Tools.*



	Department Description	Location Description	Reports To Name	Review Due Date	Review Type	Review Status	Employee Name	Emplid	Employee Job Title	Status	Full/Part Time	Reg/Temp
1	REGULATORY SERVICES	Environmental Mgment & Safety	Huff,Daniel A	2009-11-16	Annual	Scheduled	Moua,Chakavee	110060	Administrative Analyst I -C	Active	Regular	Full-Time
2	REGULATORY SERVICES	Environmental Mgment & Safety	Smestad,Lisa	2009-10-31	Annual	Scheduled	Grones,Kara Rae	112317	Administrative Analyst I -C	Active	Regular	Part-Time
3	REGULATORY SERVICES	Administration	Dressler Manz,Lisa Katherine	2009-12-31	Annual	Scheduled	Roman,Diana L	066818	Administrative Analyst I -C	Active	Regular	Full-Time

NOTE: *Each report displays the detail in a predefined sort order. However, the user can always re-sort this data on any specific column by clicking on the column heading. Data appearing on the grid is considered text so if sorting the data using a numerical field is critical, it is recommended that you download the results into Excel.*

You can use the find feature or click the next arrow to scroll through the pages. The system displays 50 results on the screen at a time, you can change the view to 100 by clicking on View 100.



NOTE: *Most of the Management Reports include a graphical representation of the data. The graphs include bar or pie charts. To see a detailed value associated with each graphical item, the user can hover the cursor arrow over the chart item and the value is displayed as is shown in the example.*

Download Report Results to Excel

1) Run the desired management report.

2) On the blue navigation bar, click the Excel ( ) icon. A dialogue box will open.

3) Click on the **Open** (Open) button.

NOTE: *The data will be displayed in an Internet Explorer Window.*

What should you do if the data appears to be incorrect?

Staff from Human Resources and Payroll, in coordination with Department HRIS Representatives, make every effort to ensure timely and accurate employee data. The management reports assist us in keeping this data accurate with your continued cooperation. If you identify any questionable data on any of the reports, please consult with one of your Department's HR support personnel (e.g., HRIS Dept Rep http://citytalk/hris/hris_dept_reps.xls or HR Generalist http://citytalk/human-resources/hr-generalists.asp) and the data will be corrected as soon as possible.

Update Reports To - Position Management

Departments are responsible for the position structure in their division areas and decide who reports to whom. To keep the information in HRIS the most current (real time data), Human Resources has given departments the security access to update the 'Reports To' field.

HRIS limits the 'Reports To' field to one individual, so if a shift employee reports to more than one supervisor, the department supervisors need to reach a consensus on who will be listed as that person's immediate supervisor. If an employee reports to you in HRIS, you have access to their:

- Employee job data
- Employee performance appraisal status information
- Vacation and sick leave accrual details
- Education and other qualifications including languages, licenses and certificates, and memberships, honors and awards
- Company property and drivers license data
- Enrollment in City-wide training
- Training learning plan

Update "Reports To"

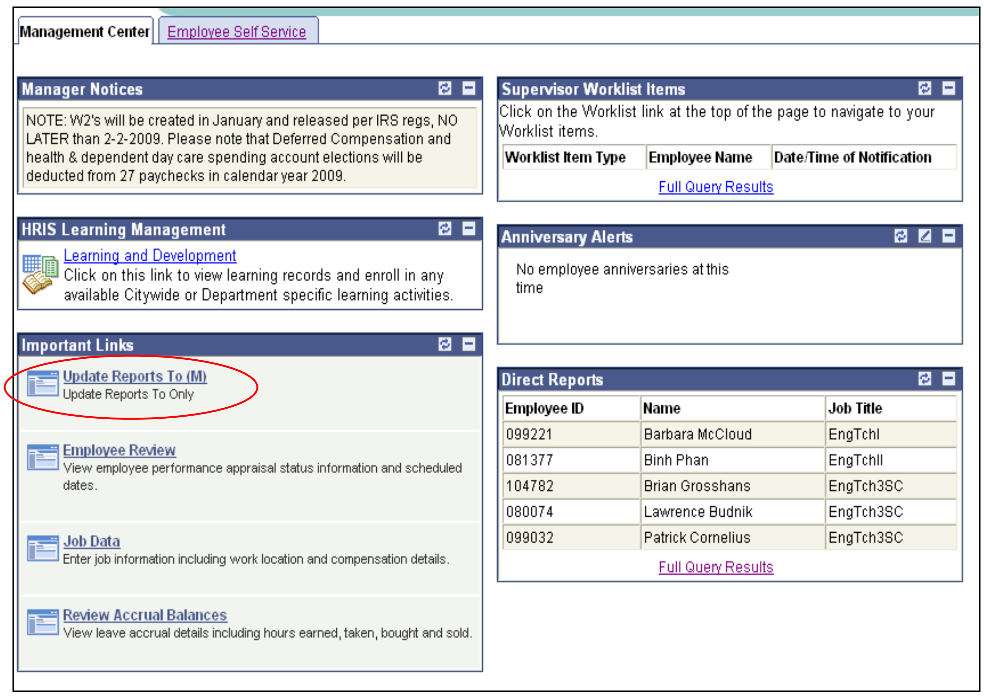
1) Run the **Position Management Report** (see page 23) to obtain the:

   - Position number *for the employee* you plan to update with a new 'Reports To'
   - Position number *for the supervisor* you intend to enter as the 'Reports To' for the employee

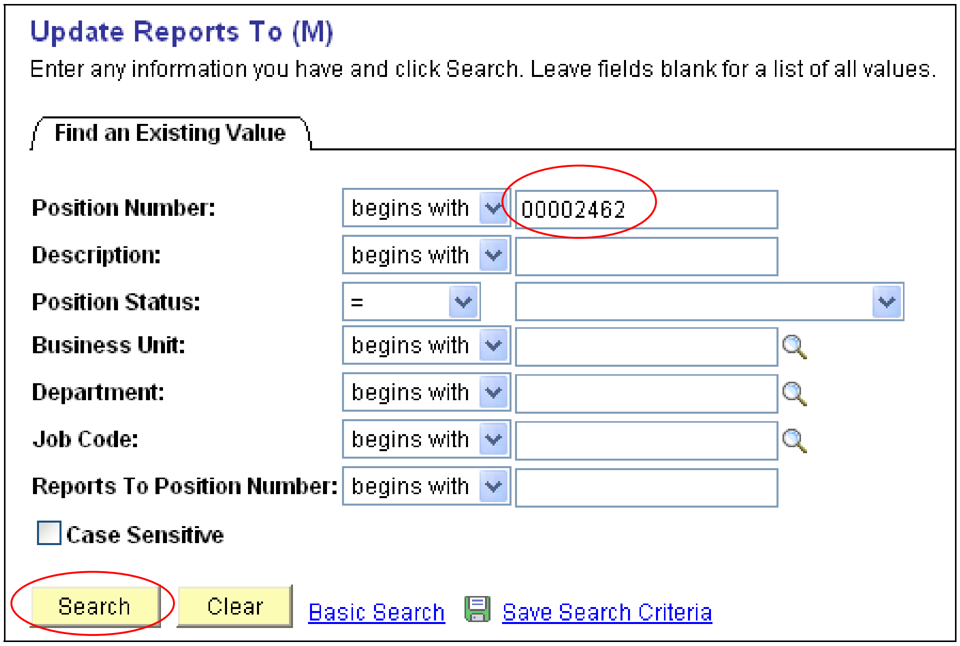
2) Write the above information down on a piece of paper—you will not be able to update the 'reports to' without it.

3) Navigate to **Management Center tab**.

4) Under **Important Links**, click on the Update Reports To link.

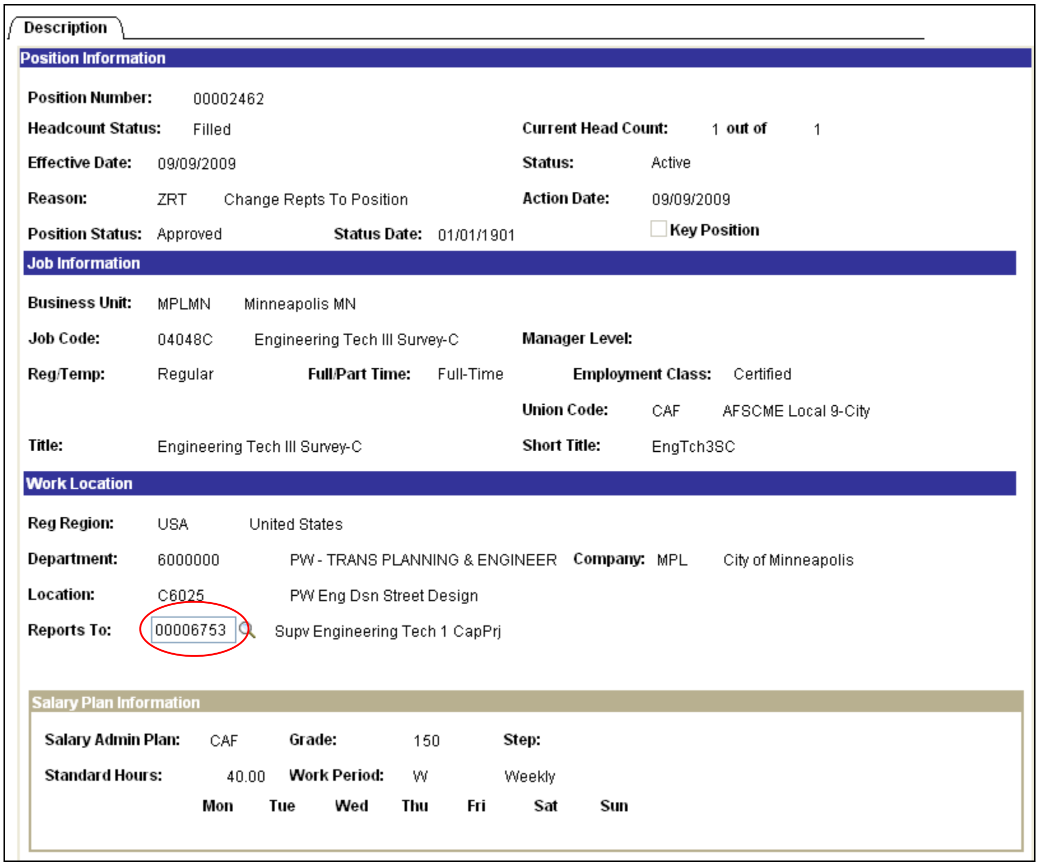


5) The easiest way to access the position you want to update is by entering the position number. Every employee has a unique position number. Type in the 8-digit **Position Number** you want to update and click on the **Search** button (Search).



Position Search Fields	
Position Number	Position Number you will be updating
Description	Job Title
Position Status	Approved, Frozen or Proposed
Business Unit	Always MPLMN
Job Code	Job Code
Reports to Position Number	Returns all positions that report to the position number

6) Under **Work Location**, type in the 8-digit position number of the *new* “Reports To” supervisor and press tab to move out of the field to accept the change. The position title will now be displayed.



Description

Position Information

Position Number: 00002462
Headcount Status: Filled | **Current Head Count:** 1 out of 1
Effective Date: 09/09/2009 | **Status:** Active
Reason: ZRT Change Repts To Position | **Action Date:** 09/09/2009
Position Status: Approved | **Status Date:** 01/01/1901 | **Key Position**

Job Information

Business Unit: MPLMN Minneapolis MN
Job Code: 04048C Engineering Tech III Survey-C | **Manager Level:**
Reg/Temp: Regular | **Full/Part Time:** Full-Time | **Employment Class:** Certified
Union Code: CAF AFSCME Local 9-City
Title: Engineering Tech III Survey-C | **Short Title:** EngTch3SC

Work Location

Reg Region: USA United States
Department: 6000000 PW - TRANS PLANNING & ENGINEER | **Company:** MPL City of Minneapolis
Location: C6025 PW Eng Dsn Street Design
Reports To: 00006753 Supv Engineering Tech 1 CapPrj

Salary Plan Information

Salary Admin Plan: CAF | **Grade:** 150 | **Step:**
Standard Hours: 40.00 | **Work Period:** W Weekly
Mon Tue Wed Thu Fri Sat Sun

NOTE: *The Effective Date will always be the current date (today’s date).*

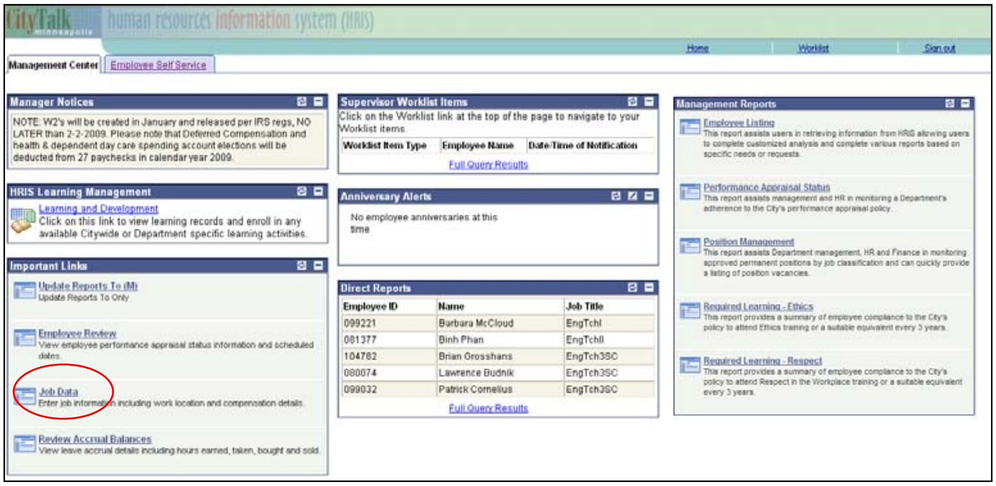
7) Click on the **Save** button (Save).

IMPORTANT NOTE! *‘Reports To’ can only be updated once per day. If the wrong data is entered, contact Barbara.payton@ci.minneapolis.mn.us or Crystal.Dejarlais@ci.minneapolis.mn.us to rectify.*

Verify "Reports To"

1) Navigate to **Management Center tab**.

2) Under **Important Links**, click the Job Data link.



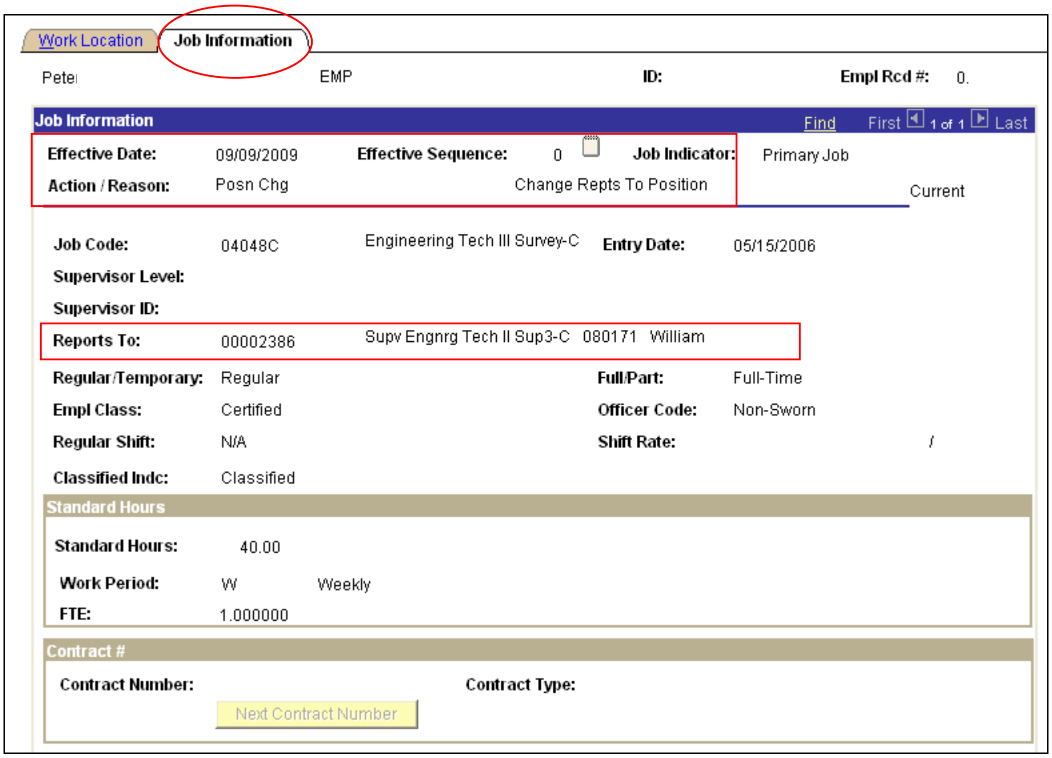
3) Type in the search criteria to find the employee you would like to pull job data information (e.g., Last Name) and click on the **Search** (Search) button.

NOTE: *If you would like a full history (current, future and history), check the "Include History" checkbox.*

4) Click on the employee's name.

5) On the **Job Information** tab, verify the following changes were made:

- Effective date changed to current date (today's date)
- Action/Reason changed to "Position Change – change Repts To Position"
- Reports To changed to new "Reports To" supervisor



Employee Review - Performance Management

Performance management is a systematic process of communication between the supervisor and the employee, focused on helping the employee achieve his or her best workplace results.

Most of the Performance Management process is outside of HRIS. HRIS is used to view and enter performance appraisal *status* information such as scheduled, completed or waived. It is not currently designed to store performance appraisal notes or ratings.

Departments may have their own protocol on scheduling performance reviews. Check with your Department for details.

Performance management should be a year-round, ongoing process of:

- Communicating expectations and mutually setting goals.
- Coaching, both formally and informally, to help employees successfully meet goals and expectations.
- Annual, documented performance review (appraisal).

If an employee demonstrates poor work habits or fails to meet work requirements, corrective action will include:

- Documenting the behavior or performance.
- Coaching.
- Developing and implementing a Work Improvement Plan.

Purpose

The purpose of a performance appraisal is for a supervisor and an employee to have a candid discussion about performance expectations and actual performance. The employee's actual level of performance is compared to the expected level of performance using standards that were developed by the supervisor with input from the employee.

This expected level of performance is to be derived from the department work plans that in turn reflect the City's goals and desired performance measurements. Performance measurements show what outcomes have been achieved as a result of the individual and work unit activity. The comparison of actual performance with expectations and standards serves as a basis for recognizing accomplishments and planning for improvement where deficiencies are found.

Performance appraisals may also be utilized in a progressive disciplinary process to resolve continuing poor performance.

The benefits to be gained from conducting performance appraisals include:

- Recognizing accomplishments
- Identifying newly acquired competencies
- Preparing employee development plans
- Planning improvement where deficiencies are found
- Goal-setting
- Communication between supervisors and employees

The result is improved delivery of services to internal City customers and City residents.

Performance Appraisal Policy

It is the policy of the City that every employee is entitled to performance appraisal feedback on a regular basis. At least once a year the employee and the immediate supervisor will participate in a formal performance appraisal discussion. A copy of each annual performance appraisal will be reviewed and signed by the supervisor's manager and placed in the employee's department personnel file. The employee will receive a copy of the signed appraisal form. Supervisors are encouraged to hold mid-year informal performance review discussions at least once a year as well. As part of these reviews, the supervisor and employee shall plan for the upcoming performance review period by anticipating upcoming responsibilities and identifying development opportunities.

Supervisors and managers will be held accountable for conducting performance reviews of those they supervise. HRIS will be used to monitor the status of performance reviews for all City Departments. It is the responsibility of Department managers and HR Generalists working with HRIS Representatives to ensure HRIS is kept up-to-date.

Procedures

Because of fluctuations in workloads and personal preferences, departments may determine whether they wish to hold performance reviews for all employees at a specific date or on each employee's anniversary date. HRIS must be used to maintain the status of employee performance reviews. All employees (excluding temporary and/or intermittent) should have a performance review recorded in HRIS at least once a year. At the time an employee is hired, HRIS will automatically schedule the employee’s first performance review period. The scheduled date will equal the employee’s probation date or one year from the hire date, whichever is first. It is the supervisor’s responsibility to initiate the performance appraisal process for each employee. HRIS will provide supervisors a “worklist” notification 30 days prior to the scheduled review date.

The outcome of a successful performance appraisal is that the supervisor and the employee walk away from a face-to-face dialog with a common understanding of the employee's past performance and a plan for future performance. The employee should receive a copy of the performance appraisal form in advance along with encouragement to complete the form. The supervisor will also complete the form and they will have a discussion based on the information they prepare.

The supervisor should schedule a time for the interview and allow the employee reasonable time to prepare. The supervisor and employees will discuss what the employee has done well and what needs improvement. They will discuss how to improve and develop a plan to achieve those goals.

The supervisor and employee shall, at the completion of the interview, sign the form and date it. The supervisor's manager shall also sign the form. The supervisor or manager must notify their HRIS Representative that the performance review is completed. The HRIS Representative will update HRIS to reflect the completed performance review and schedule the employee’s next review. A scheduled review is required for the HRIS automated “worklist” notification.

Generally, employees are eligible to be considered for advancement to the next higher step within the pay range as provided by appropriate bargaining agreement, if applicable. The employer may withhold or delay the increase for unsatisfactory job performance. The employee shall be notified of the action and the specific reason therefore.

Forms

Performance appraisal forms are available on the Human Resources webpage in CityTalk: http://citytalk/human-resources/appraisals.asp

- Exempt Employees Form
- Non-exempt Employees Form

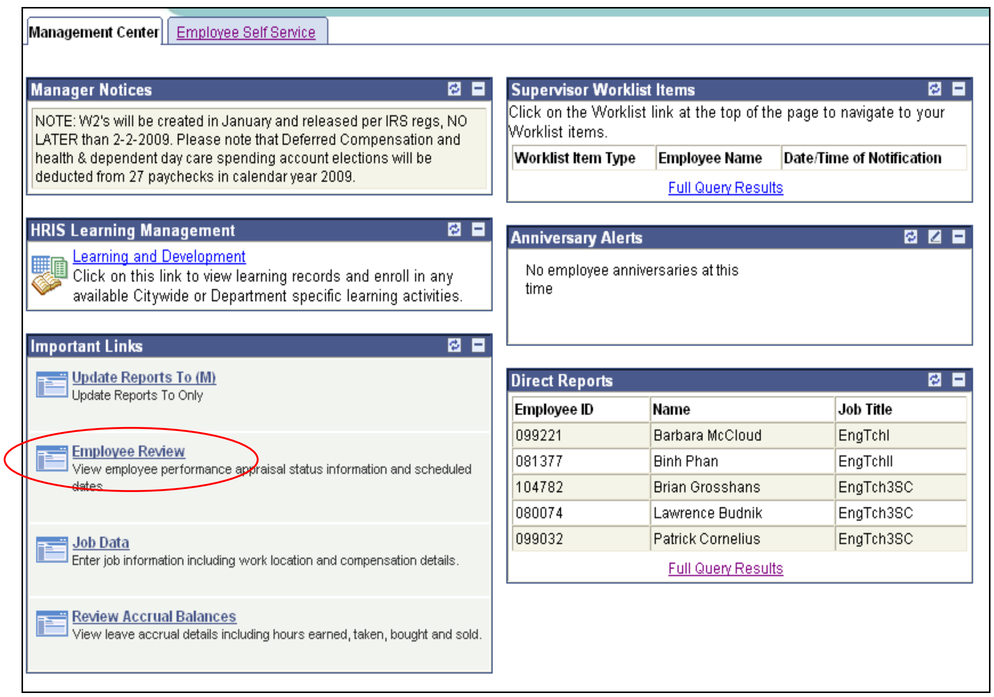
Although departments are not required to use the standard City forms, they are encouraged to work with their HR Generalist if they decide to design alternate forms and must be reviewed with the Human Resources Director before they are put into use.

Enter Performance Appraisal Status

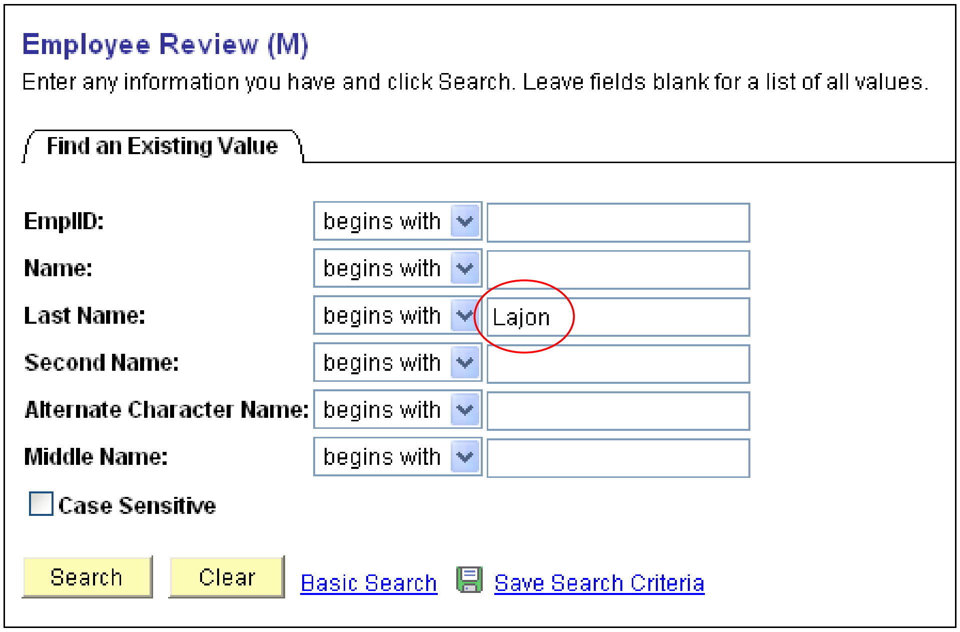
The status should be updated in the system *after* doing the actual performance review.

1) Navigate to **Management Center tab**.

2) Under **Important Links**, click the Employee Review link.

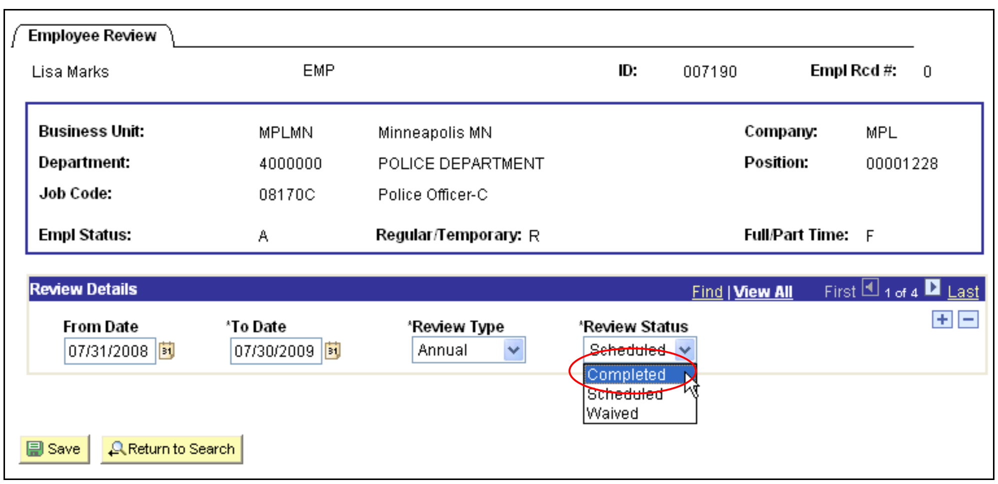


3) Type in the search criteria to find the employee you want to update the performance appraisal status for (e.g., Last Name) and click on the **Search** (Search) button.

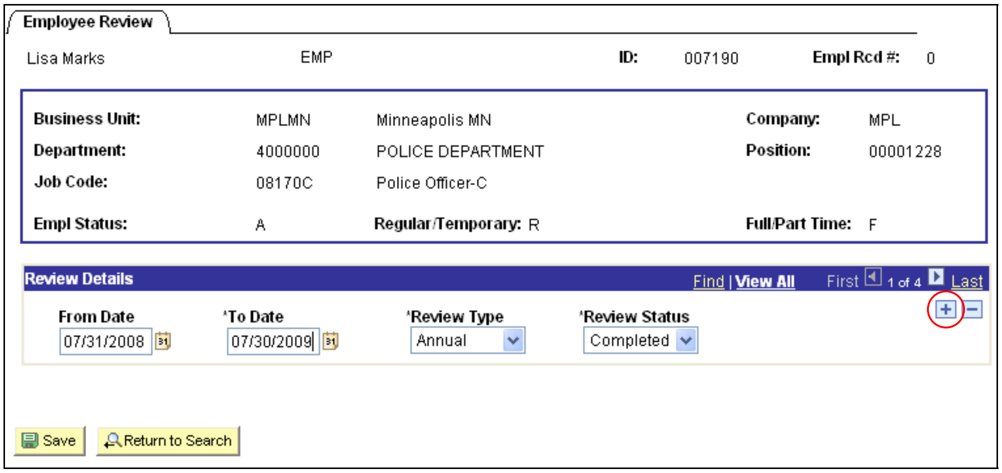


4) Confirm the review period (**From Date/To Date**) and update if necessary. (In the example below, the performance review was for the period of 7/31/08 – 7/30/09).

Click **Completed** from the Review Status dropdown menu.



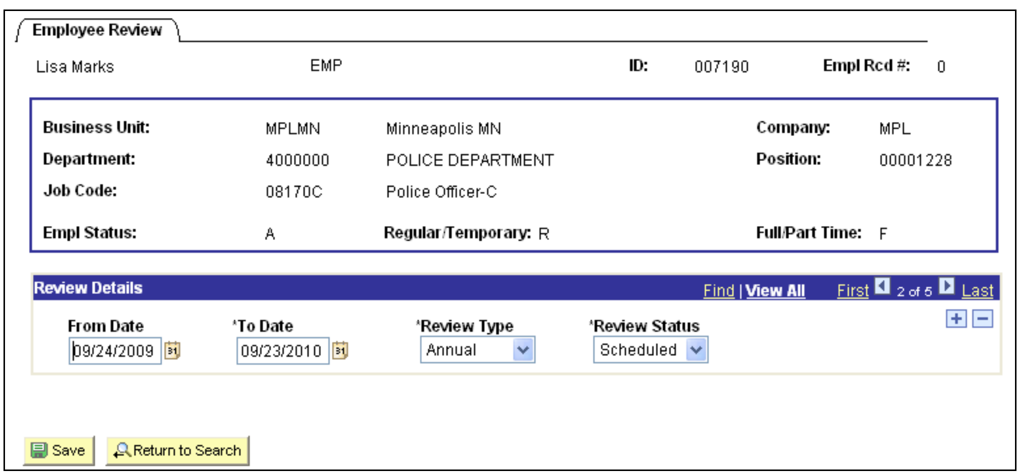
5) Click the plus sign (+) to add a new row.



The review period for the new row will automatically be listed as "scheduled". The system will default the 'From Date' to the current date and the 'To Date' out one year.

Enter a new review period if you do not wish to accept the default review period.

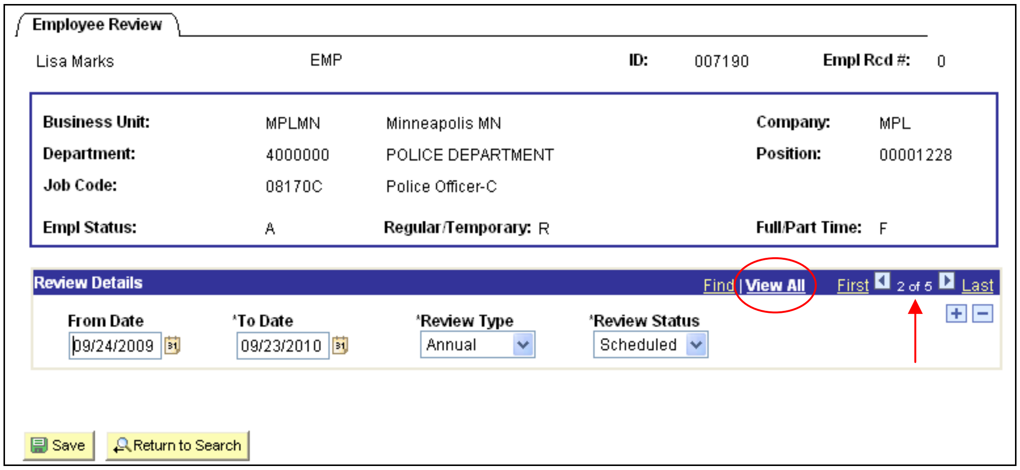
NOTE: *The 'From Date' on the new row must be greater than the 'To Date' on the previous row. Dates cannot overlap.*



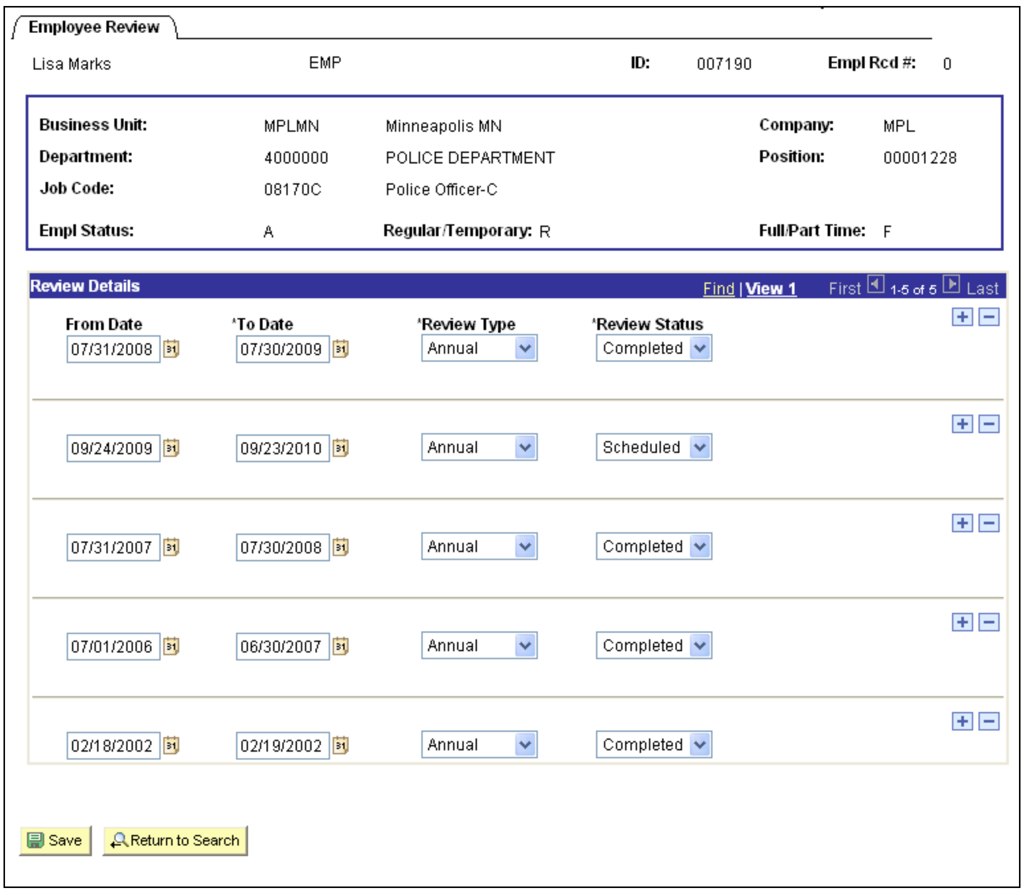
6) Click the **Save** button (Save).

NOTE: *Did you notice the number changes on the blue navigation bar when you added a new record? This indicates the number of performance review records in the system.*

To view all records, click the View All link (View All).



An expanded **Review Details** screen will open.



NOTE: *The rows will be in correct date order once the system refreshes.*

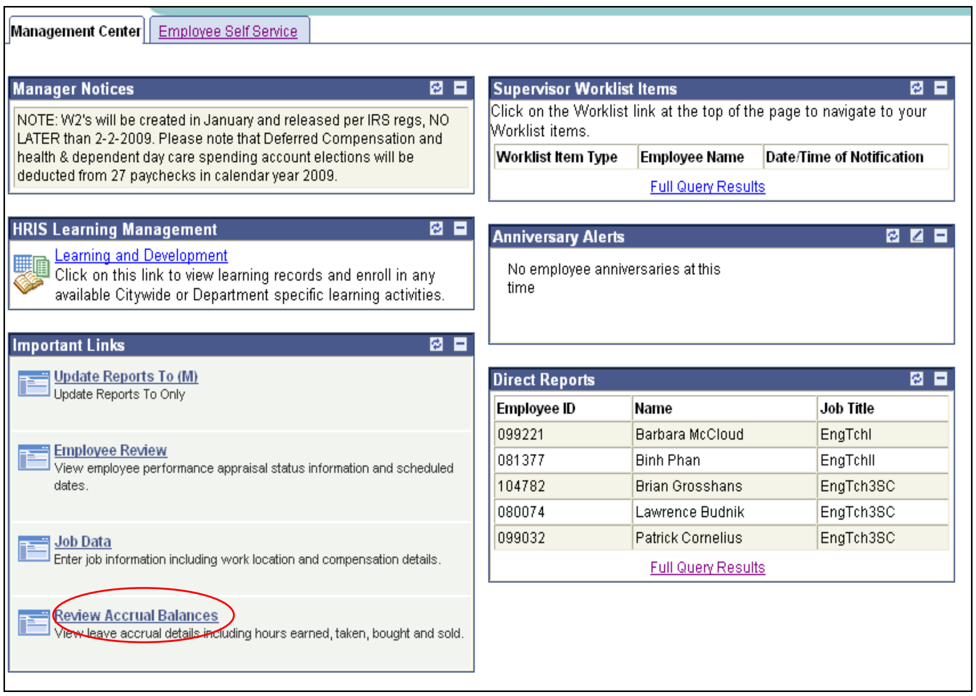
Review Accrual Balances

If you have direct reports, you have the ability to review leave accrual details including hours earned, taken, bought and sold. This data can be useful if you are responsible for approving vacations or have absenteeism issues.

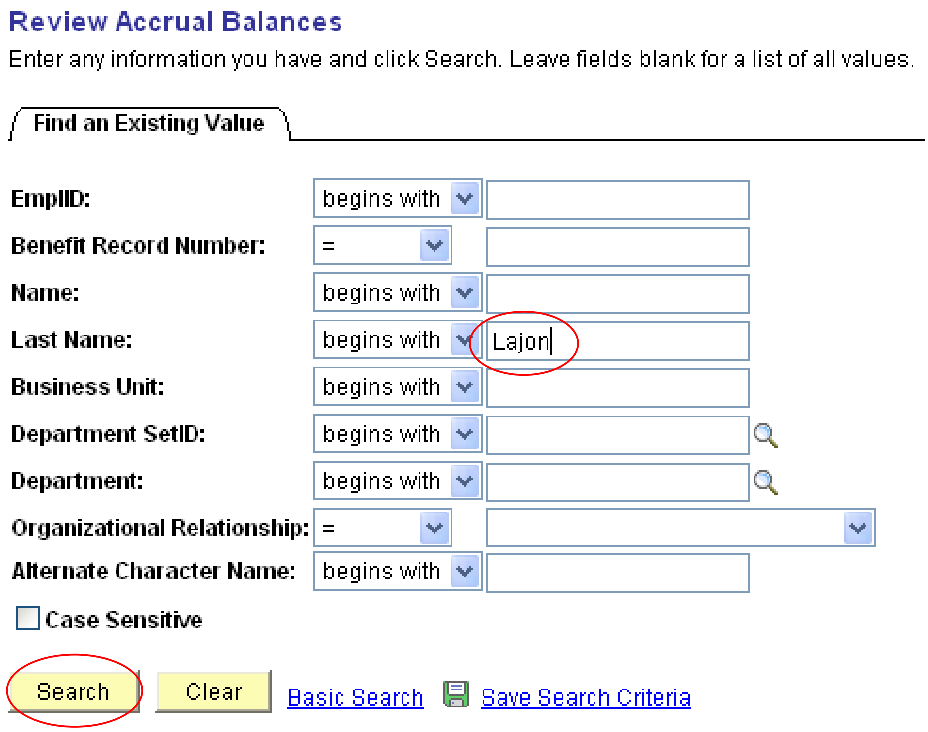
Review Accrual Balances

1) Navigate to **Management Center tab**.

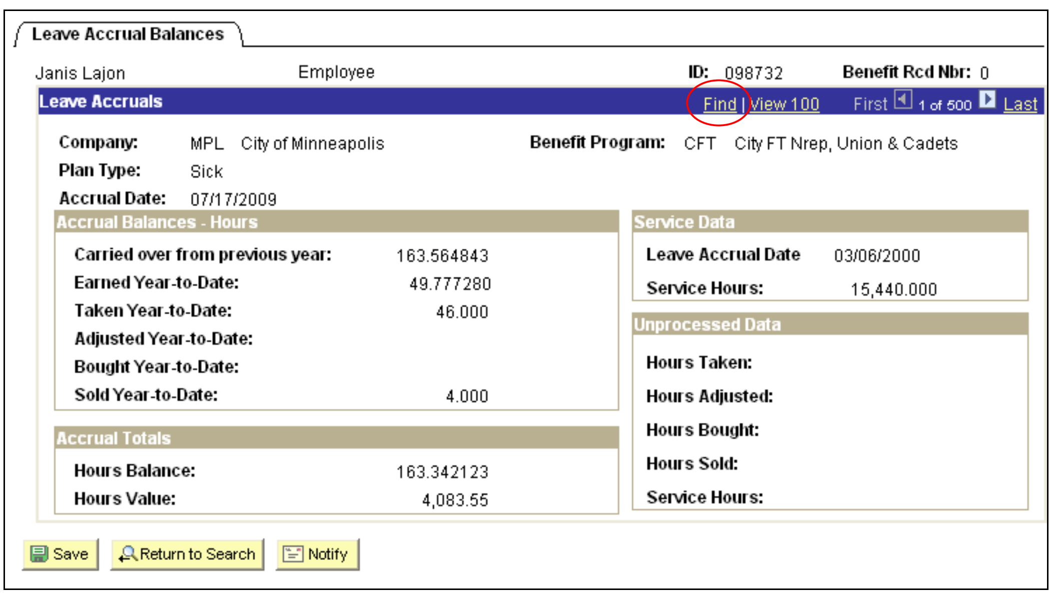
2) Under **Important Links**, click the Review Accrual Balances link.



3) Type in the search criteria to find the employee you want to review the accrual balance for (e.g., Last Name) and click on the **Search** (Search) button.



4) Sick Leave balances and accrual are listed first. To view Vacation Leave balances and accruals, click on the **Find** link.



In the dialogue box, type ‘vacation’ and click OK.

HRIS-Learning Management

Lesson Objectives:

Upon completion of this lesson, you will be able to:

- Understand HRIS-Learning Management Terminology
- View Team Member Learning
- Search and Browse the Learning Catalog
- Enroll Team Member in Training
- Review Team Learning Summary
- Drop Team Member from Training
- Add Supplemental Learning to Team Member’s Learning
- Add Item (Course) to Team Member’s Learning Plan

HRIS Learning Management Overview

HRIS Learning Management (HRIS-LM) is a separate internet-based application within HRIS. It enables the City to manage, track, deliver, and report on learning delivered to employees within or outside of the City. It is a single system for learners, managers, instructors, and administrators.

Learners and managers can use self-service to browse and search to view and find activities in the learning catalog, add activities to their learning plans, and initiate enrollment in activities.

Managers and Supervisors have access to:

- Enroll team members (i.e., employees) into activities
- Plan and assign learning for team members
- Record supplemental learning for team members
- View team's learning progress
- Review team members' planned, current, and completed learning

HRIS-Learning Management Terminology

Learning Catalog	Learning opportunities the City offers internally (city-wide or department specific).
Catalog Items	Specific topics of study, equivalent to courses, available to learners. An example of an item would be PowerPoint 2003 – Level 1 or Dealing with Conflict.
Activities	Specific topic which can be delivered through one or more delivery methods. Examples of activities would be classroom training, eLearning, or podcasts.
Team Members	List of all your direct reports. You can view details about each member's learning. If any of your team members have direct reports, you can view their team learning as well.
Team Learning	List of the learning your team members are enrolled in and programs for which they are registered.
Supplemental Learning	Record of completed team members' training that is NOT listed on the City's Learning Catalog. For example, if an employee attended a conference or workshop by an outside vendor.

Team Learning

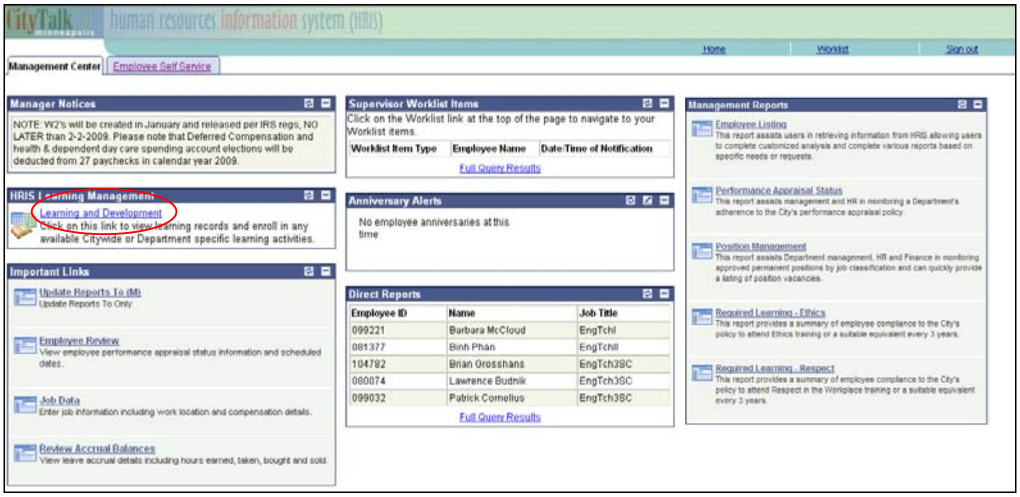
Team Learning allows you to view a listing of the learning activities, programs, and supplemental learning associated with any of your direct reports. You can also drop learners from activities and enroll learners.

In addition, you can view the details, progress status, and schedules for your team members. Each enrollment and registration goes through a series of enrollment or registration statuses, such as planned, waitlisted, enrolled, in progress, and completed—as the enrollment or registration progresses.

Enrollment Statuses	
Planned	The activity is added to the learner's learning plan.
Waitlisted	The activity for which an enrollment request is submitted is full. The system adds the learner to the waitlist. The system automatically sets this status upon enrollment if the activity is full and the activity has a waitlist enabled. Prerequisites must be met (if required) .
Enrolled	The system confirms the learner's enrollment in the activity. Depending on the type of activity, the learner can begin the activity or wait for the first scheduled session.
In progress	This status implies that the learner has begun the activity in some way. At least one learning component has a completion status of in progress, completed, or not completed.
Dropped	The learner's enrollment for the activity is dropped. The activity no longer appears in the learner's schedule.
Completed	Learner has successfully completed the activity. This status is achieved when all required learning components for the activity have a completed completion status.
Not completed	Learner has attempted the activity but has not successfully completed it. This status is achieved when at least one required learning component has a not attempted, in progress, or not completed completion status by the activity end date or by the end of the activity's learning period.
Waived	Learner has completed supplemental learning that is equivalent to the activity. When an activity is waived, and any of the activity's objectives were assigned to the learner with a status of needed, the system automatically updates the status of those objectives to met.

View Team Member Learning

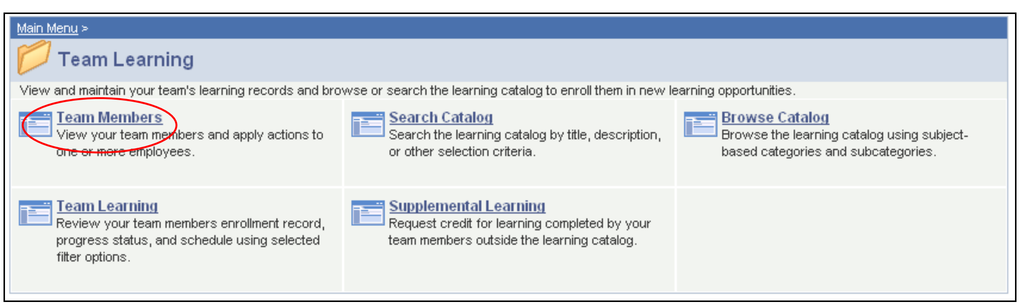
1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.



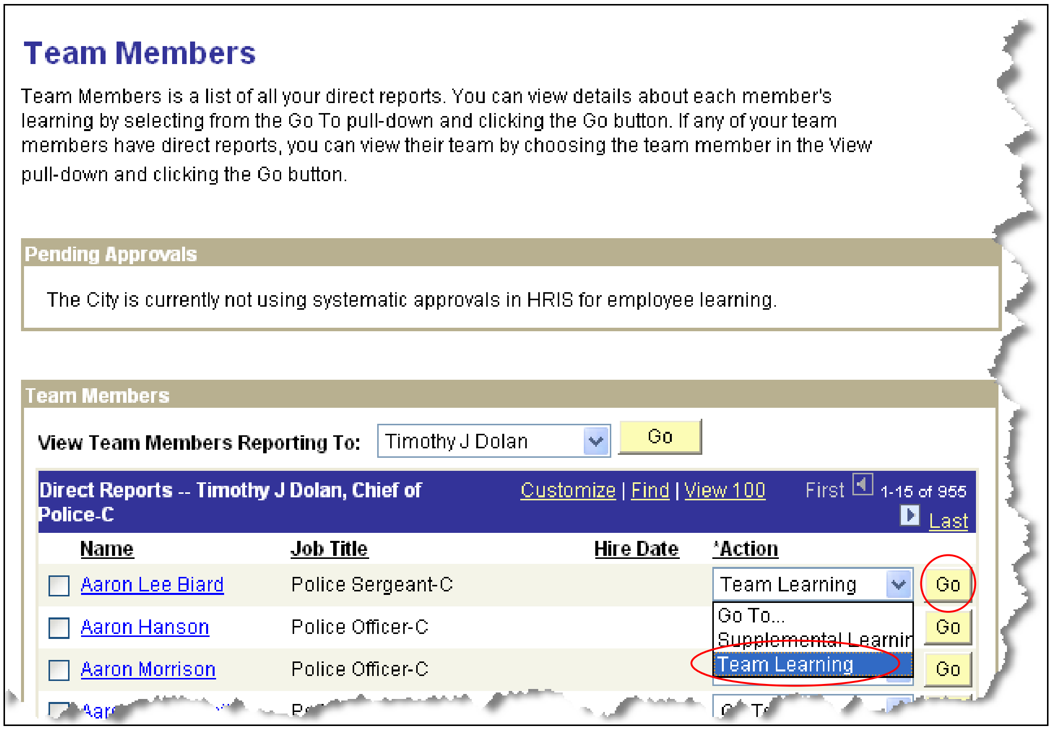
2) Click **Team Learning** on the Menu.

NOTE: *Select 'Team Learning' to access direct reports' training records. Select 'My Learning' if you wish to access your training records.*

3) Click Team Members link.

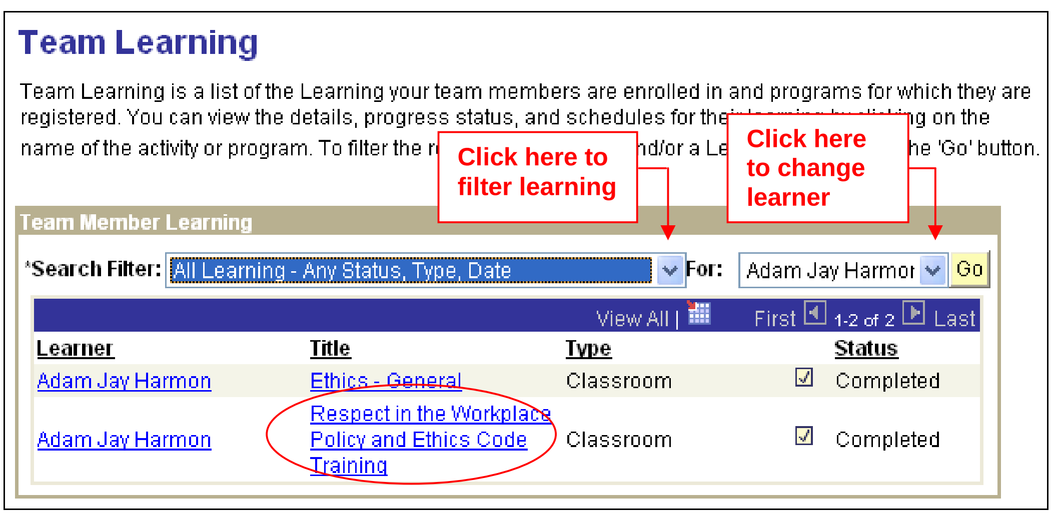


4) Select **Team Learning** for the specified employee from the Action drop down box and then click the **Go** button (Go).



__NOTE:__ If any of your team members have direct reports, you can view their team by choosing the team member in the 'View Team Members Reporting To' pull down box and clicking the __Go__ button.

5) Click on the **Title** for additional details.



NOTE: To obtain a more focused list, click on the 'Search Filter' drop down list and select the desired filter. If you would like to view a different employee's learning, click on the 'For' drop down list.

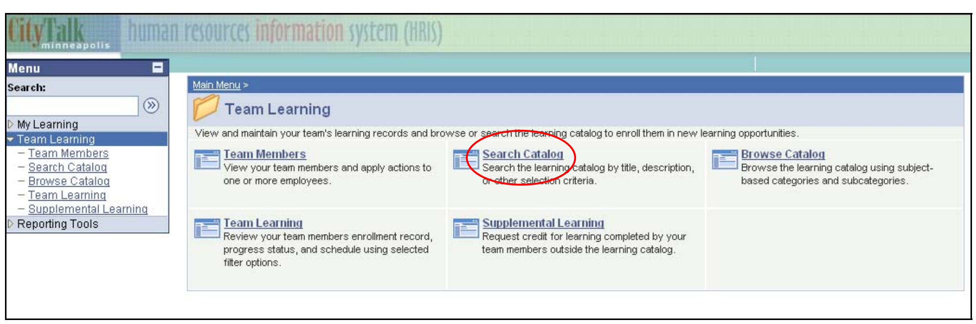
Search Filters
All Learning – Any Status, Type, Date
All Learning – Completed
All Learning – Currently Enrolled, In Process
All Learning – Within Last Month
All Learning – Within Last Year
Supplemental – Continuing Education Only
Supplemental Only - All

Search Catalog to Enroll Team Member

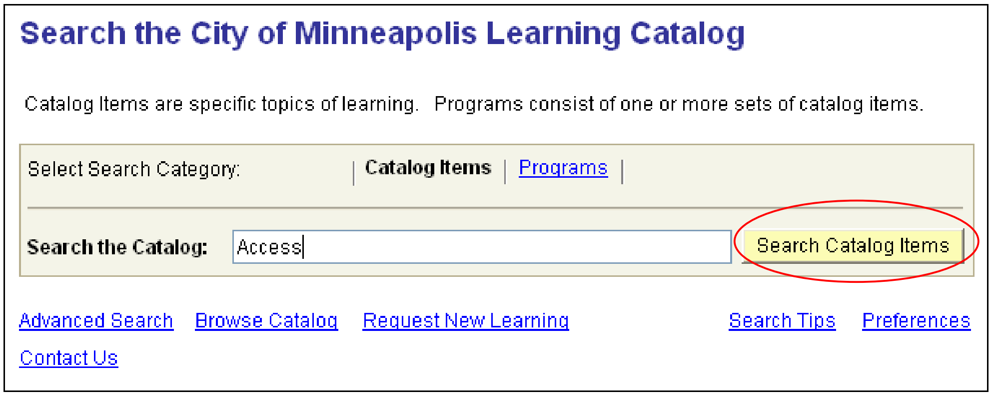
1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

2) Click **Team Learning** on the Menu.

3) Click on Search Catalog.

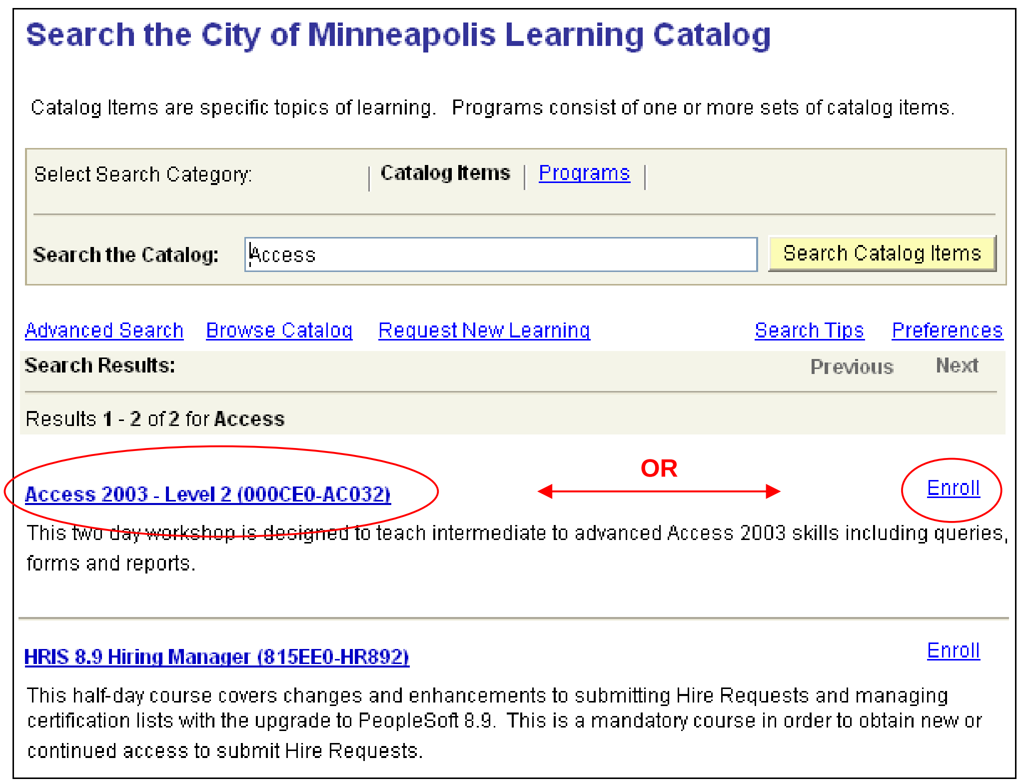


4) Type in part or all of the course title in the field box and then click the **Search Catalog Items** button (Search Catalog Items).



NOTE: *Results will bring back any instance of the search word in the course title or course description. It is often easier to search using key words instead of a full course title.*

5) Locate the desired activity from the list of search results and click on the course title or the Enroll link.



6) Click on View Details link to determine if seats are available.

Access 2003 - Level 2

Description:

This two day workshop is designed to teach intermediate to advanced Access 2003 skills including queries, forms and reports.

This course is designed for the student who wishes to learn intermediate-level operations of the Microsoft Access program. The Level 2 course is for the individual whose job responsibilities include creating new databases, tables, and relationships, as well as working with and revising intermediate-level queries, forms, and reports. It also introduces the student to integrating Access data with other applications such as Microsoft Word or Excel.

Objectives
- Structure Existing Data
- Write Advanced Queries
- Simplify Tasks with Macros
- Add Interaction and Automation with Macros
- Make Forms more Effective
- Make Reports More Effective
- Maintain an Access Database
- Expand the Reach of Your Data

If activities are available for Access 2003 - Level 2, they will be listed in the table below. You can "View Details", "Enroll" or "Add to Plan". If no activities are available, you can select "Add to Plan" to indicate your interest in a future activity. This will appear on your My Learning page as a planned activity and will let Training and Development know of your interest in this activity.

Please note that activities without a specified Start Date can be taken at any time.

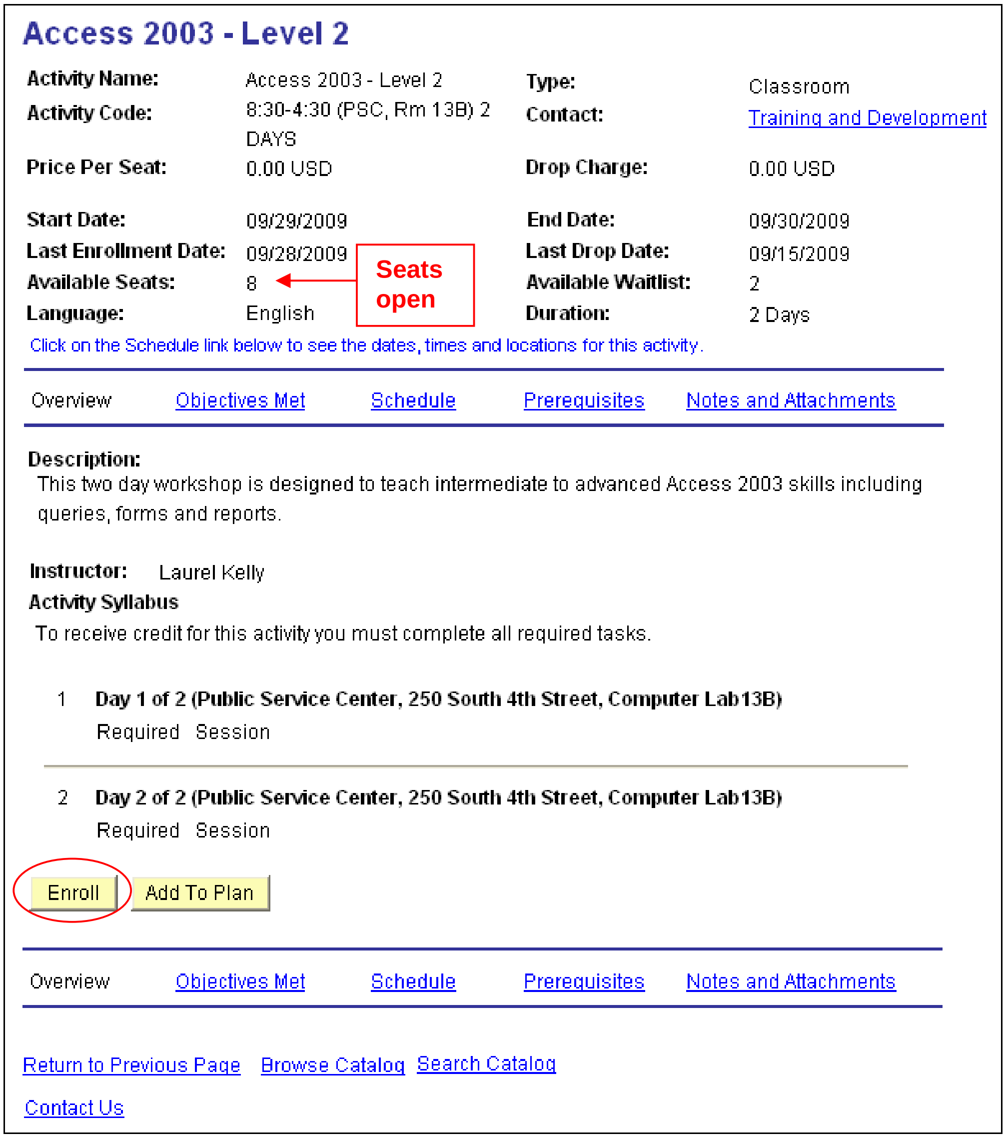
Activity Options for Access 2003 - Level 2

Activity Code	Type	Start Date	Price			Add to Plan
8:30-4:30 (PSC, Rm 13B) 2 DAYS	Classroom	09/29/2009	0.00 USD	View Details	Enroll	Add to Plan

Add Item To Plan   Return to Previous Page   Contact Us

Enroll

7) Confirm seats are available and then click the **Enroll** button ( ).



Access 2003 - Level 2

Activity Name:	Access 2003 - Level 2	**Type:**	Classroom
Activity Code:	8:30-4:30 (PSC, Rm 13B) 2 DAYS	**Contact:**	Training and Development
Price Per Seat:	0.00 USD	**Drop Charge:**	0.00 USD
Start Date:	09/29/2009	**End Date:**	09/30/2009
Last Enrollment Date:	09/28/2009	**Last Drop Date:**	09/15/2009
Available Seats:	8	**Available Waitlist:**	2
Language:	English	**Duration:**	2 Days

Seats open

Click on the Schedule link below to see the dates, times and locations for this activity.

Overview Objectives Met Schedule Prerequisites Notes and Attachments

Description:
This two day workshop is designed to teach intermediate to advanced Access 2003 skills including queries, forms and reports.

Instructor: Laurel Kelly
Activity Syllabus
To receive credit for this activity you must complete all required tasks.

1 **Day 1 of 2 (Public Service Center, 250 South 4th Street, Computer Lab13B)**
Required Session

2 **Day 2 of 2 (Public Service Center, 250 South 4th Street, Computer Lab13B)**
Required Session

Enroll Add To Plan

Overview Objectives Met Schedule Prerequisites Notes and Attachments

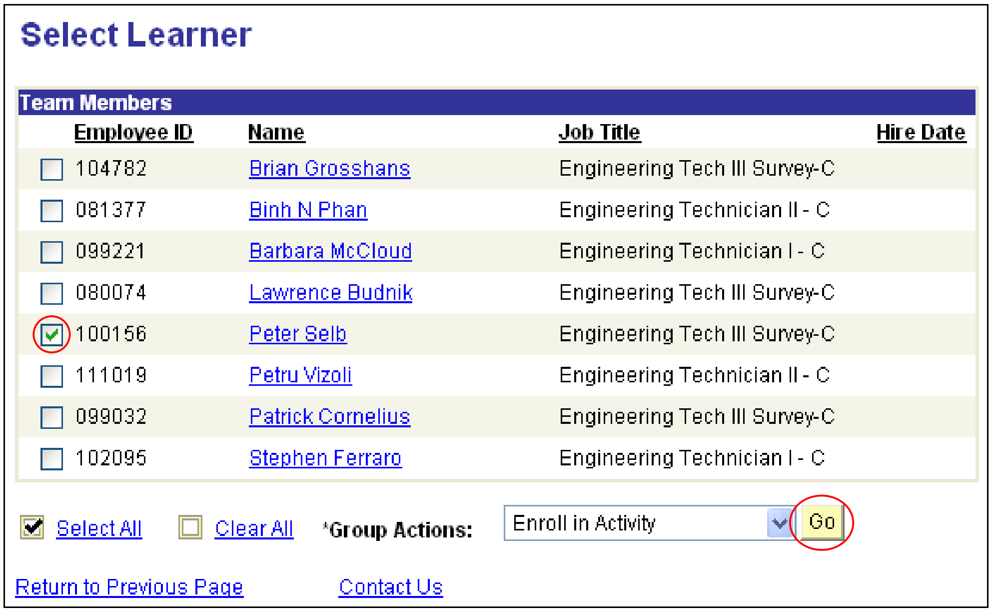
Return to Previous Page Browse Catalog Search Catalog

Contact Us

NOTE: *In this example there are 8 seats still available and 2 seats available on the waitlist. If there were 0 seats open and you proceed to enroll your employee, they would be added to the waitlist.*

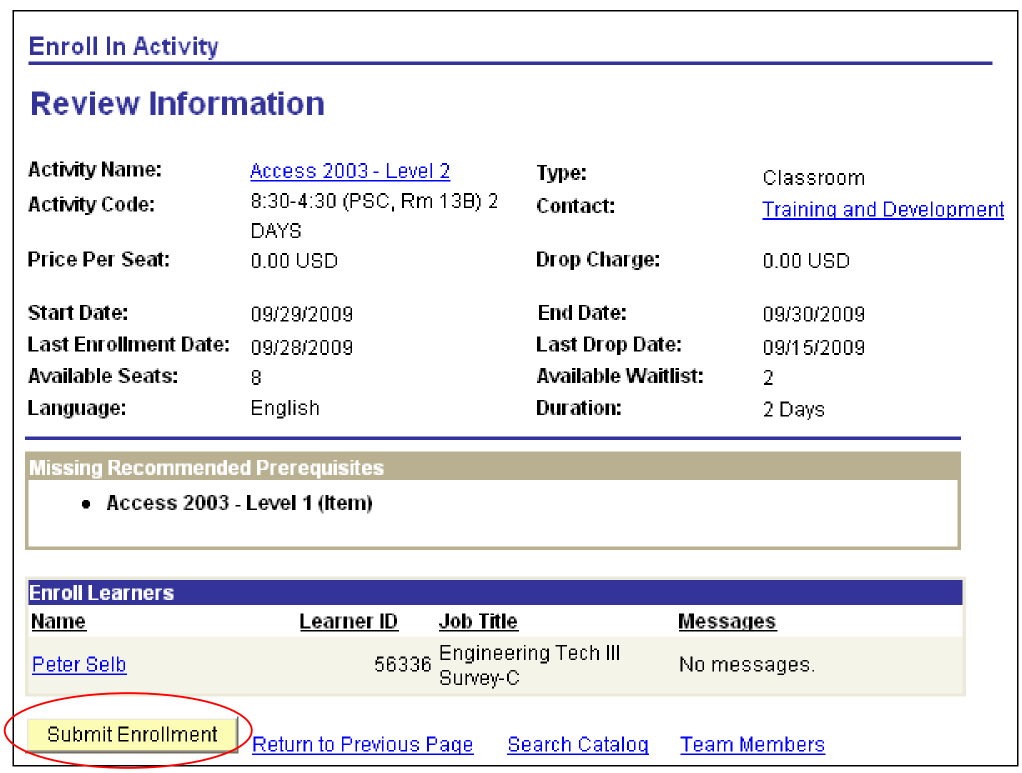
8) Click on the check box ( ) next to the Team Member's Name.

9) The **Group Actions** dropdown list will read ‘Enroll in Activity’**.** Click the **Go** button (Go).



***NOTE:** You can enroll multiple team members by clicking the* Select All *link.*

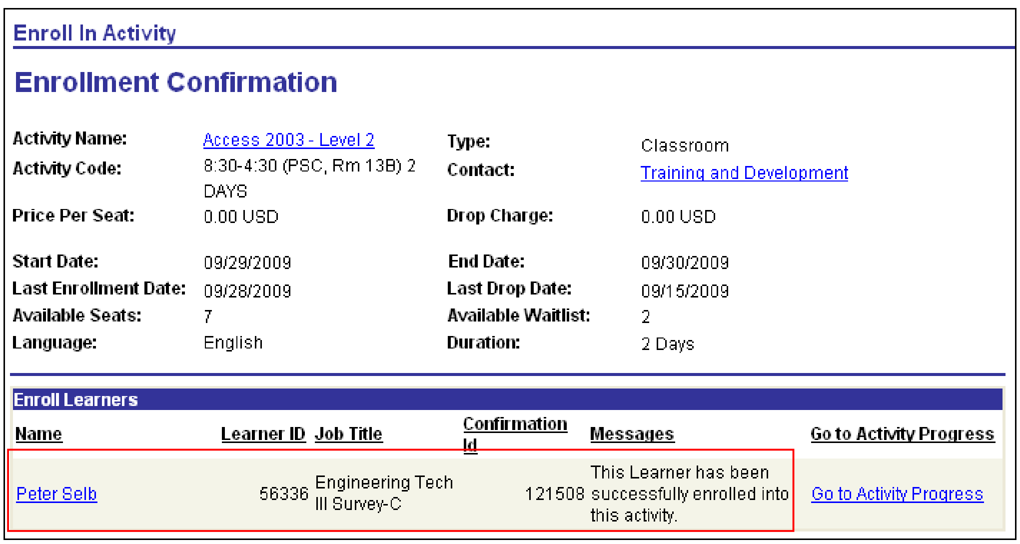
10) Click the **Submit Enrollment** button.



NOTE: *In the above example, a message indicates there is a recommended prerequisite missing. In this instance, you can either choose to proceed with the enrollment or search the catalog for Access 2003 – Level 1 for the employee to attend. In some cases, a prerequisite may be required before you can enroll someone in the class.*

Types of Alert Messages	
Duplicate Enrollment	A duplicate enrollment has been found. This enrollment cannot be processed.
Missing prerequisites	This learner is missing the required prerequisites.
Activity full – no waitlist	The learning activity is full and this activity does not allow waitlist.
Activity full - waitlist	This Learner has been added to the waitlist for this activity.

11) The team member is now successfully enrolled into the activity. The employee and supervisor will both receive an automated confirmation notification via email within an hour of registration.


Enroll In Activity

Enrollment Confirmation

Activity Name:	Access 2003 - Level 2	**Type:**	Classroom
Activity Code:	8:30-4:30 (PSC, Rm 13B) 2 DAYS	**Contact:**	Training and Development
Price Per Seat:	0.00 USD	**Drop Charge:**	0.00 USD
Start Date:	09/29/2009	**End Date:**	09/30/2009
Last Enrollment Date:	09/28/2009	**Last Drop Date:**	09/15/2009
Available Seats:	7	**Available Waitlist:**	2
Language:	English	**Duration:**	2 Days

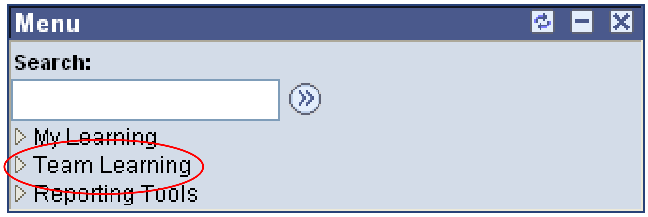
Enroll Learners

Name	Learner ID	Job Title	Confirmation Id	Messages	Go to Activity Progress
Peter Selb	56336	Engineering Tech III Survey-C	121508	This Learner has been successfully enrolled into this activity.	Go to Activity Progress

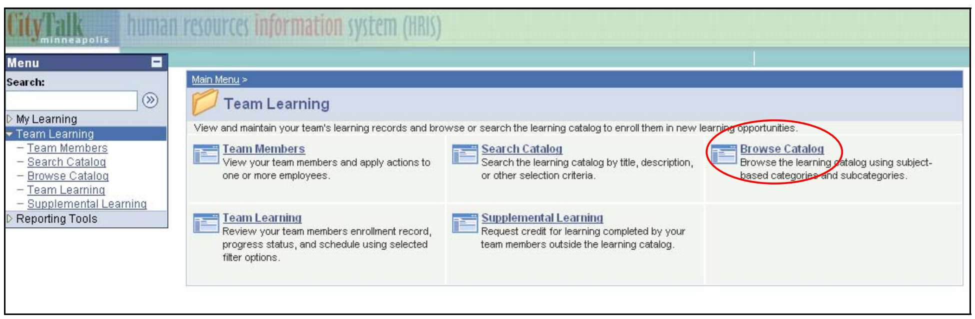
Browse Catalog to Enroll Team Member

1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

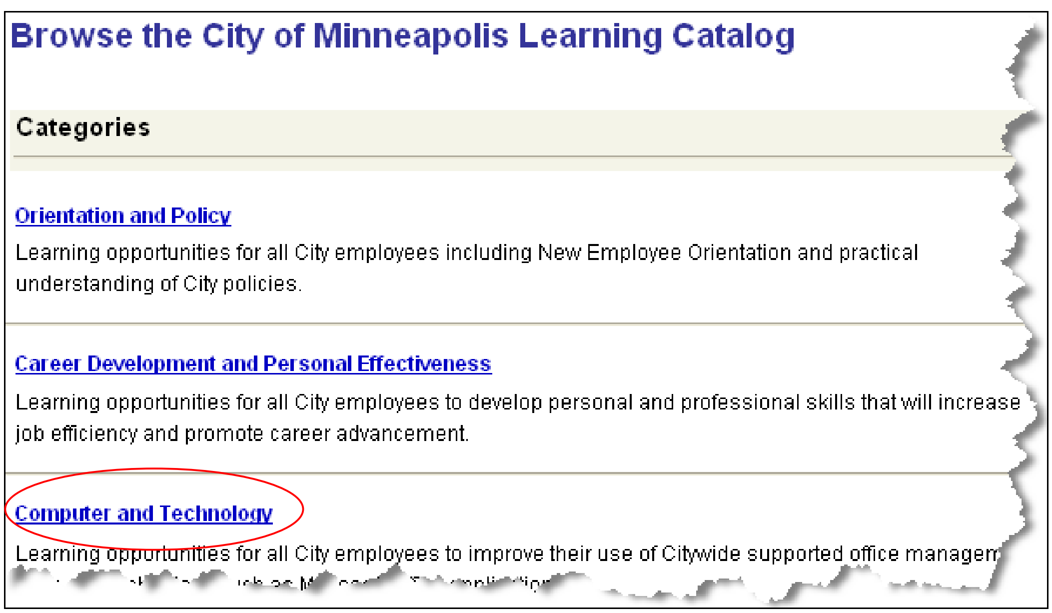
2) Click **Team Learning** on the Menu.



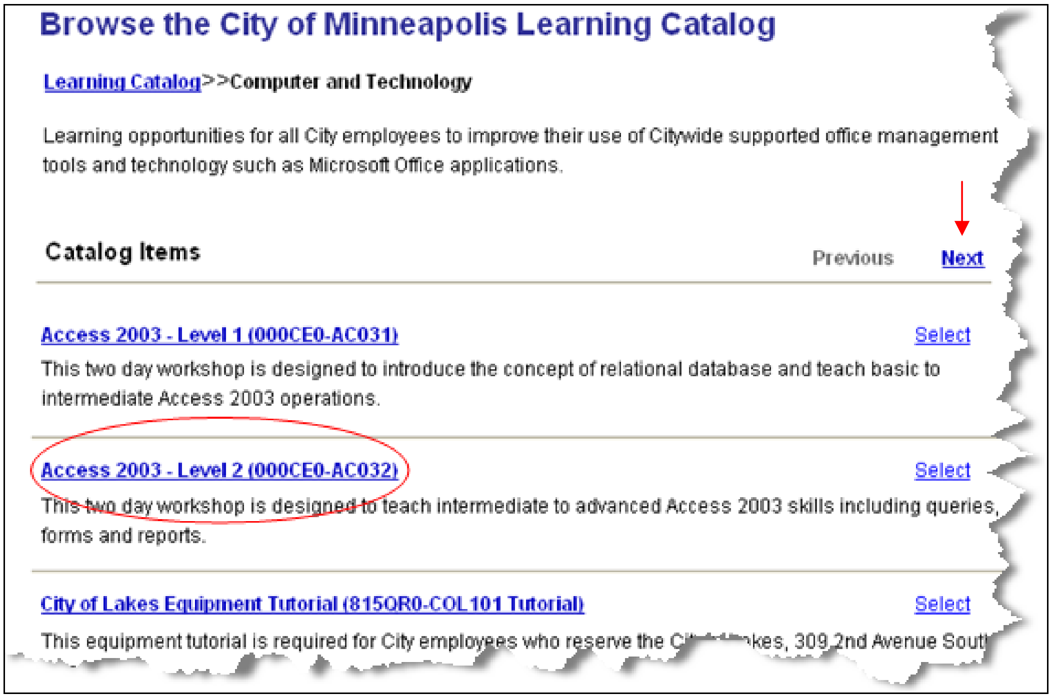
3) Click on the Browse Catalog link.



4) Click on the desired **Category**.

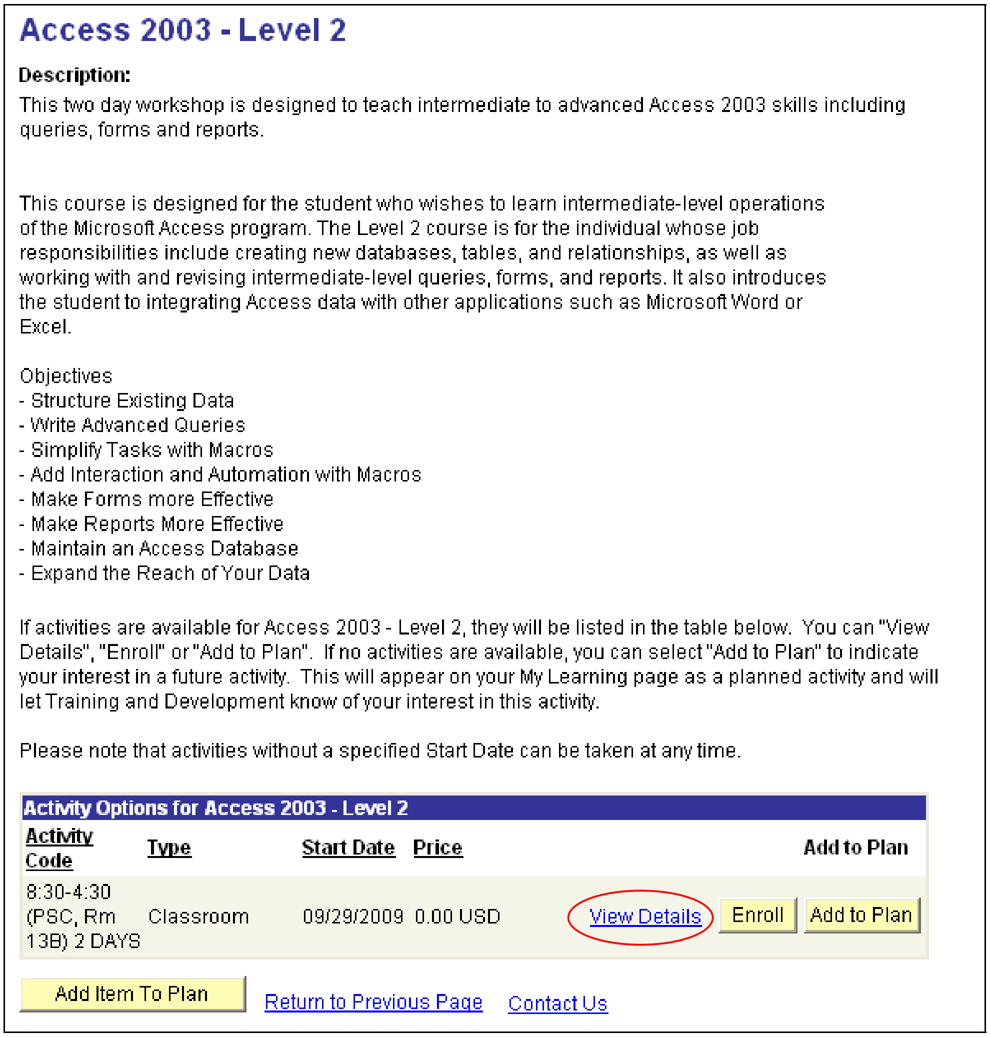


5) Click on the desired **Catalog Item** for details.



NOTE: *If more than 5 items exist under a category, you can use the Previous and Next links at the top of the page to move through the list of offerings.*

6) Click on View Details link to determine if seats are available.



Access 2003 - Level 2

Description:

This two day workshop is designed to teach intermediate to advanced Access 2003 skills including queries, forms and reports.

This course is designed for the student who wishes to learn intermediate-level operations of the Microsoft Access program. The Level 2 course is for the individual whose job responsibilities include creating new databases, tables, and relationships, as well as working with and revising intermediate-level queries, forms, and reports. It also introduces the student to integrating Access data with other applications such as Microsoft Word or Excel.

Objectives
- Structure Existing Data
- Write Advanced Queries
- Simplify Tasks with Macros
- Add Interaction and Automation with Macros
- Make Forms more Effective
- Make Reports More Effective
- Maintain an Access Database
- Expand the Reach of Your Data

If activities are available for Access 2003 - Level 2, they will be listed in the table below. You can "View Details", "Enroll" or "Add to Plan". If no activities are available, you can select "Add to Plan" to indicate your interest in a future activity. This will appear on your My Learning page as a planned activity and will let Training and Development know of your interest in this activity.

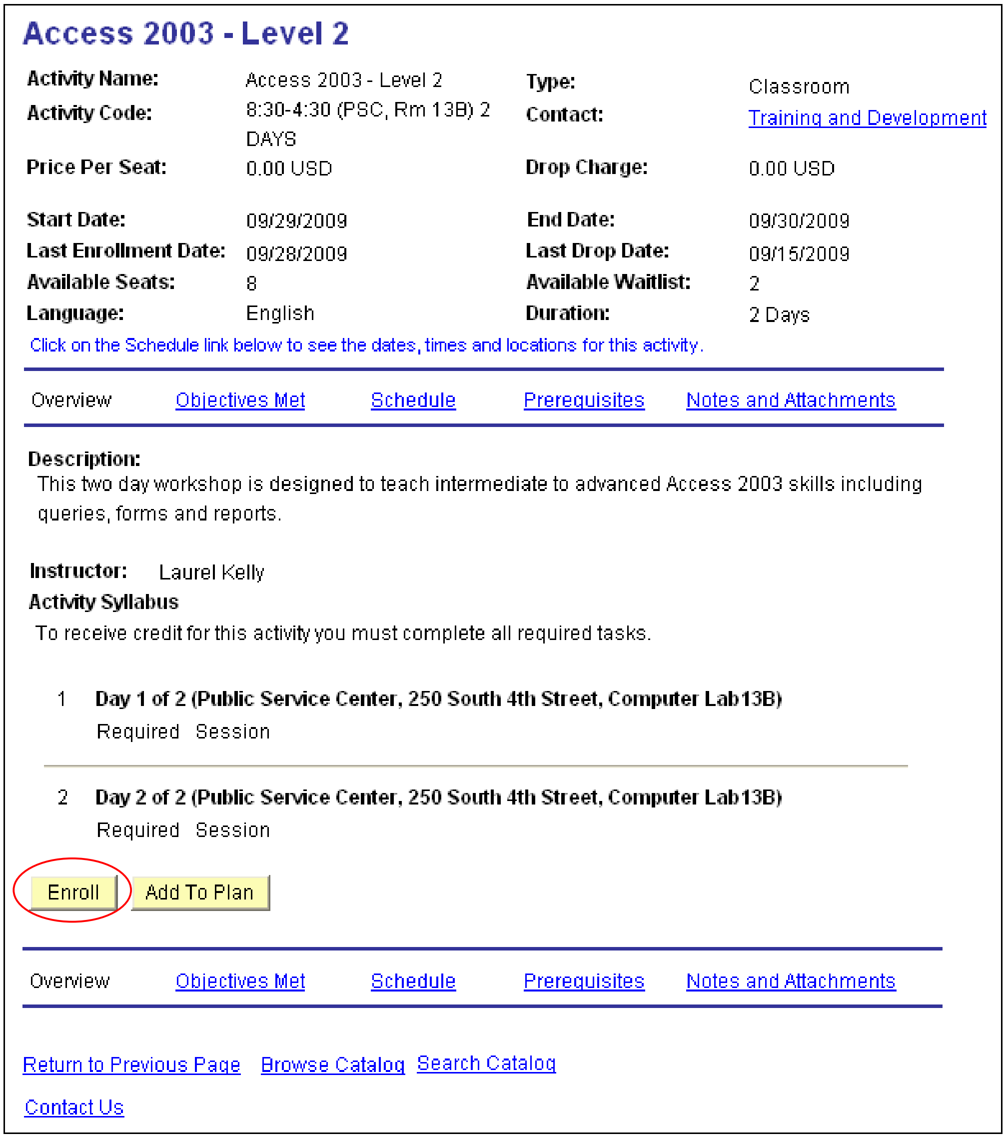
Please note that activities without a specified Start Date can be taken at any time.

Activity Options for Access 2003 - Level 2

Activity Code	Type	Start Date	Price			Add to Plan
8:30-4:30 (PSC, Rm 13B) 2 DAYS	Classroom	09/29/2009	0.00 USD	View Details	Enroll	Add to Plan

Add Item To Plan   Return to Previous Page   Contact Us

7) Confirm seats are available and then click the **Enroll** button (Enroll).



Access 2003 - Level 2

Activity Name:	Access 2003 - Level 2	**Type:**	Classroom
Activity Code:	8:30-4:30 (PSC, Rm 13B) 2 DAYS	**Contact:**	Training and Development
Price Per Seat:	0.00 USD	**Drop Charge:**	0.00 USD
Start Date:	09/29/2009	**End Date:**	09/30/2009
Last Enrollment Date:	09/28/2009	**Last Drop Date:**	09/15/2009
Available Seats:	8	**Available Waitlist:**	2
Language:	English	**Duration:**	2 Days

Click on the Schedule link below to see the dates, times and locations for this activity.

Overview Objectives Met Schedule Prerequisites Notes and Attachments

Description:
This two day workshop is designed to teach intermediate to advanced Access 2003 skills including queries, forms and reports.

Instructor: Laurel Kelly
Activity Syllabus
To receive credit for this activity you must complete all required tasks.

1 **Day 1 of 2 (Public Service Center, 250 South 4th Street, Computer Lab13B)**
Required Session

2 **Day 2 of 2 (Public Service Center, 250 South 4th Street, Computer Lab13B)**
Required Session

Enroll Add To Plan

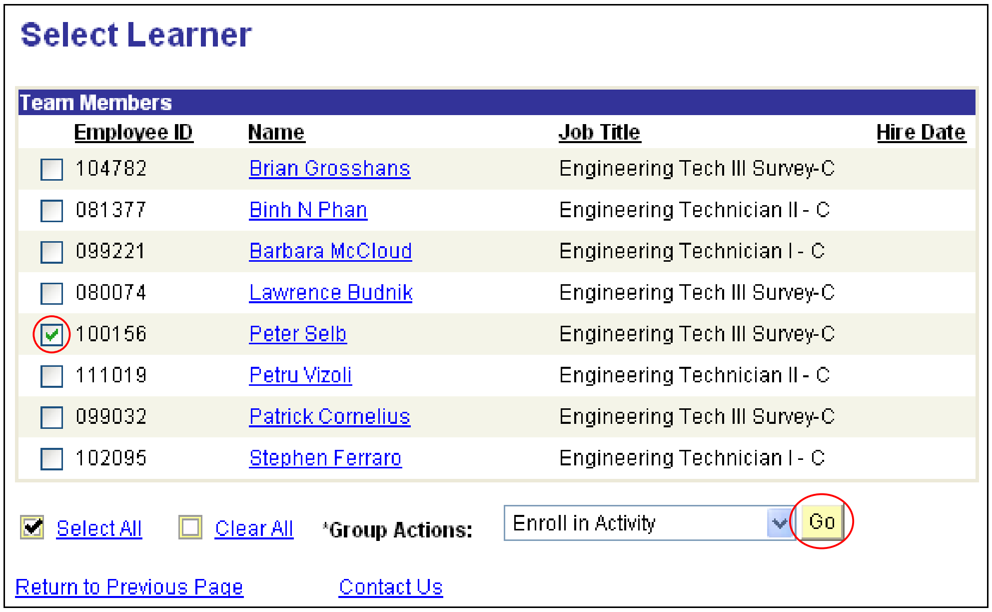
Overview Objectives Met Schedule Prerequisites Notes and Attachments

Return to Previous Page Browse Catalog Search Catalog

Contact Us

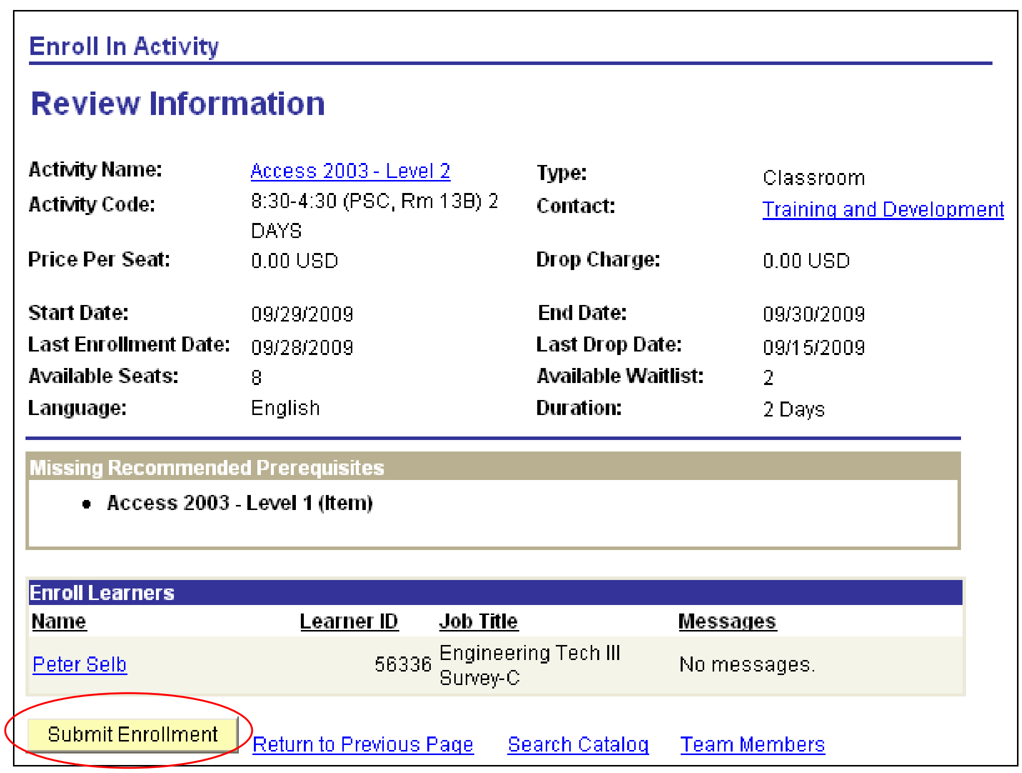
8) Click on the check box (☑) next to the Team Member's Name.

9) The **Group Actions** dropdown list will read ‘Enroll in Activity’. Click the **Go** button (Go).

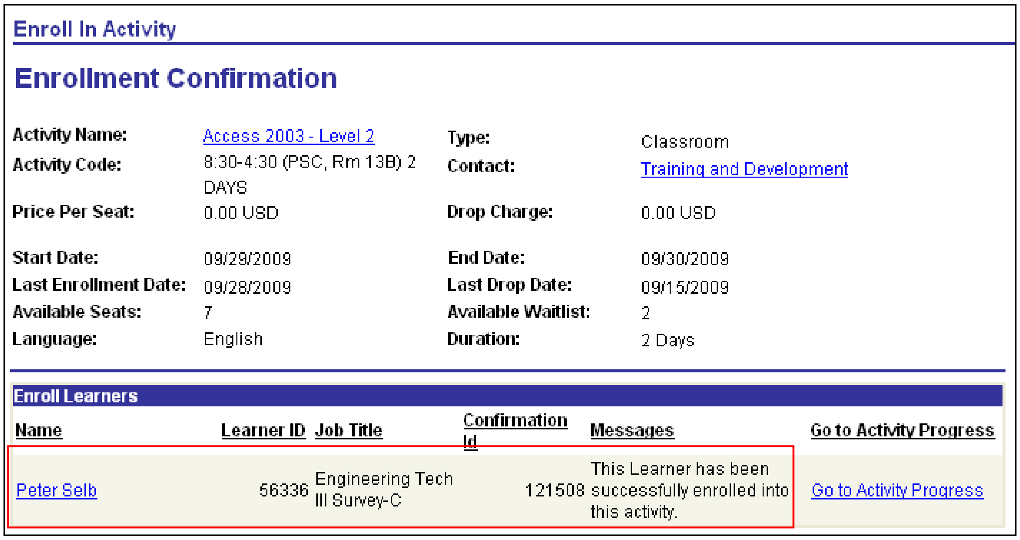


NOTE: *You can enroll multiple team members by clicking the* Select All *link.*

10) Click the **Submit Enrollment** button



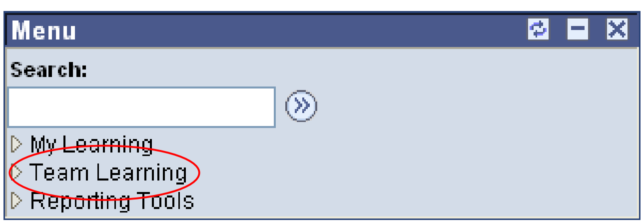
11) The team member is now successfully enrolled into the activity. The employee and supervisor will both receive an automated confirmation notification via email within an hour of registration.



Review Team Learning

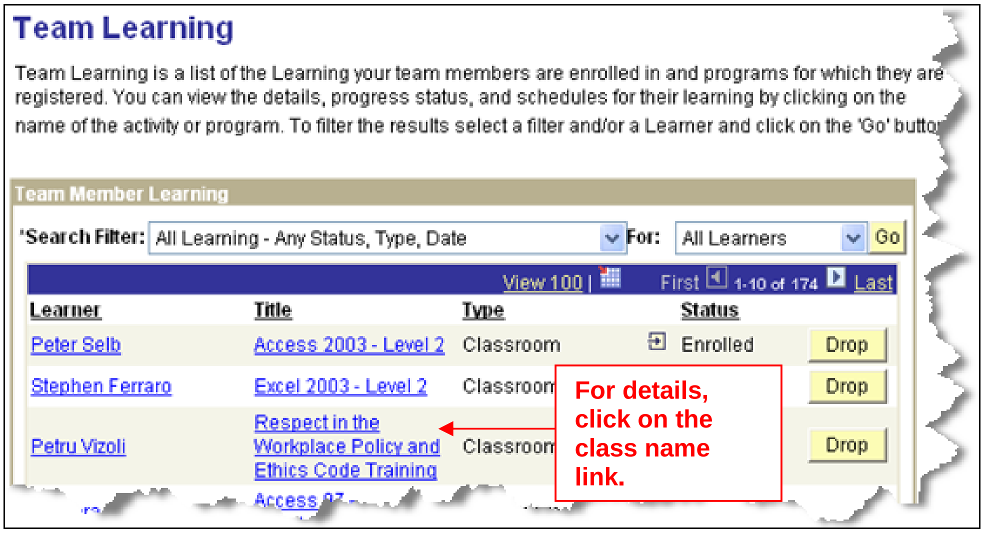
1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

2) Click **Team Learning** on the Menu.



3) Click on the Team Learning link.

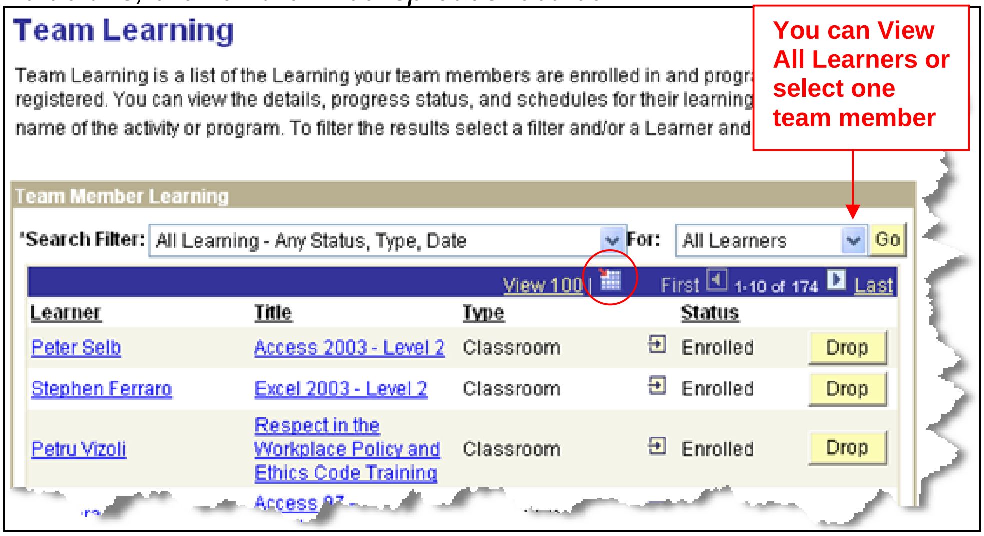
4) All learning for your direct reports will be displayed. Click on the **Class Title** link for additional details (date, time, description).



__NOTE:__ To obtain a more focused list, click on the 'Search Filter' drop down box and select the desired filter.

All Learning – Any Status, Type, Date
All Learning – Completed
All Learning – Currently Enrolled, In Process
All Learning – Within Last Month
All Learning – Within Last Year
Supplemental – Continuing Education Only
Supplemental Only - All

***NOTE:** You may want to download the results in an Excel spreadsheet. To do this, click on the Excel spreadsheet icon.*



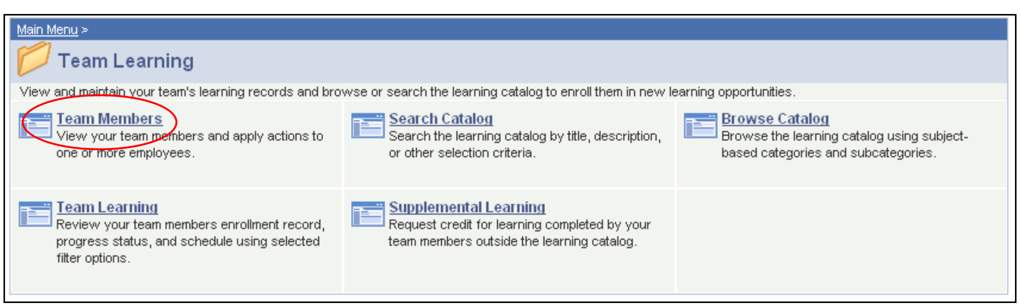
Drop Training for Team Member

Through Team Learning, you can drop team members from activities and programs. You can take this action if the employee did not get department approval prior to enrolling, if the employee is sick and unable to attend a training or if circumstances arise in the department that do not allow time away from the field or office.

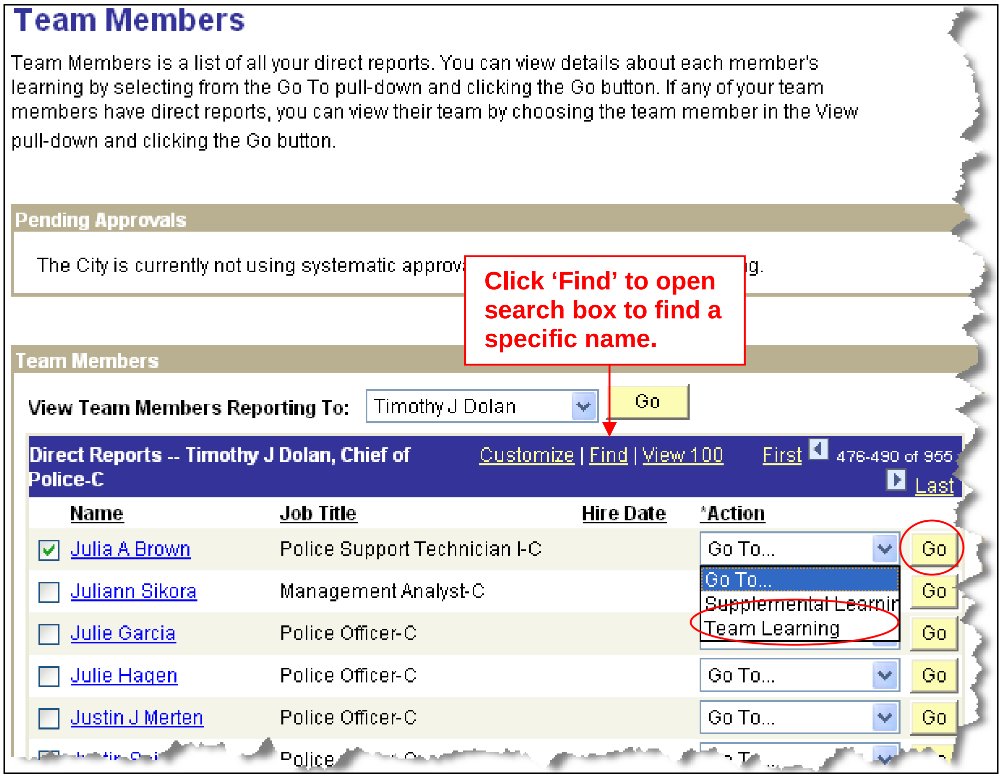
1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

2) Click **Team Learning** on the Menu.

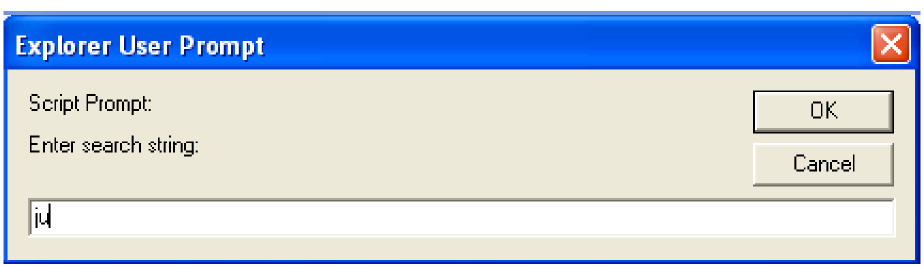
3) Click Team Members link.



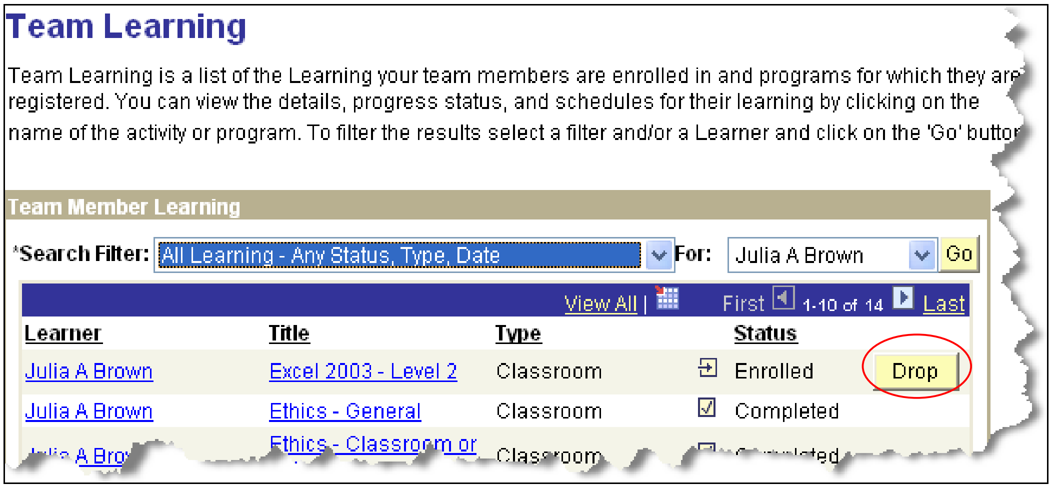
4) Select **Team Learning** from the **Action** drop down list for the employee you want to drop and then click the **Go** button (Go).



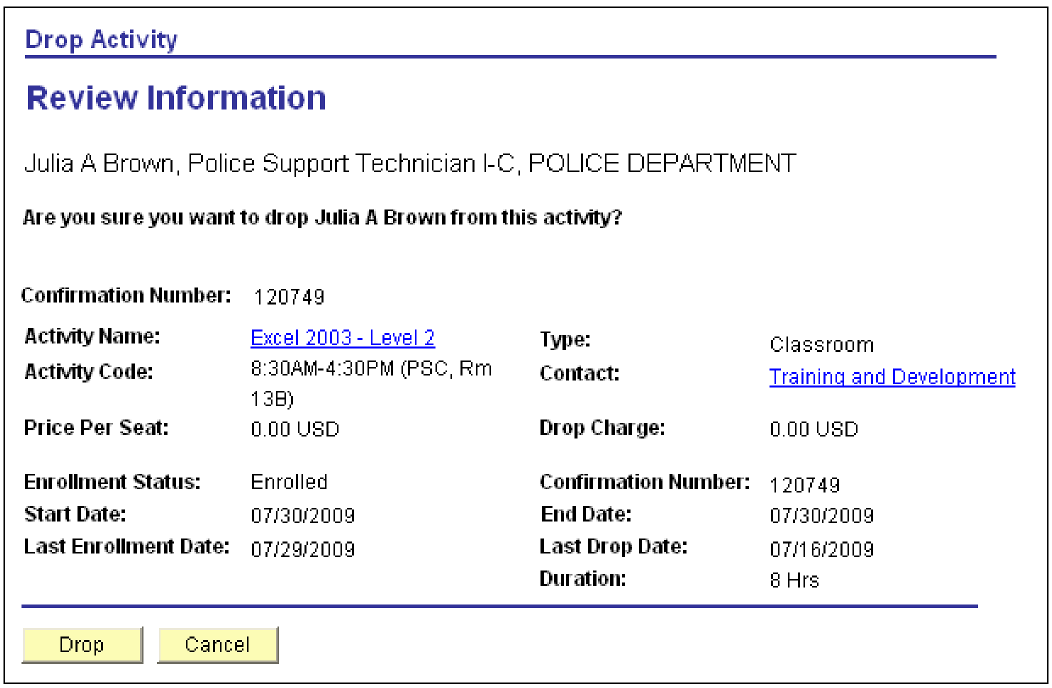
NOTE: *If you have a lot of direct reports, you can use the Find feature to narrow the search results. In the example above, "ju" was typed in the search box.*



5) Click on the Drop button (Drop) next to the activity or program you would like dropped.



6) Click on the Drop button (Drop) to verify and complete the drop process.



7) You will receive a confirmation message on the screen.

Add Item to Team Member's Learning Plan

Adding an item to a learning plan has a number of benefits for you and your employees.

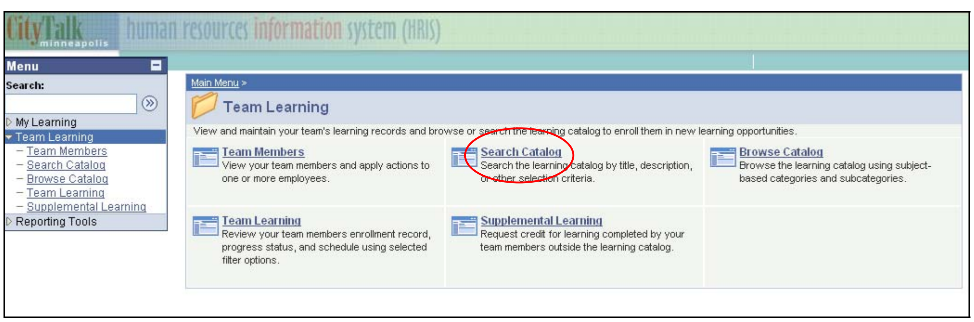
As a supervisor or manager, you can use this feature in performance reviews and individual development plans. For instance, you may have an employee who is not performing their job tasks adequately and needs to improve their Excel computer skills. During their performance appraisal, you request the employee attend the Excel training sometime within the next year and inform them you will be adding it to their training plan in HRIS Learning Management. The employee can then enroll any time and you can check back at the next review to see if the employee met the request.

Another benefit to adding an item to an employee's training plan is that the employee will receive priority seating and notified first when a new session is scheduled before it is announced City-wide.

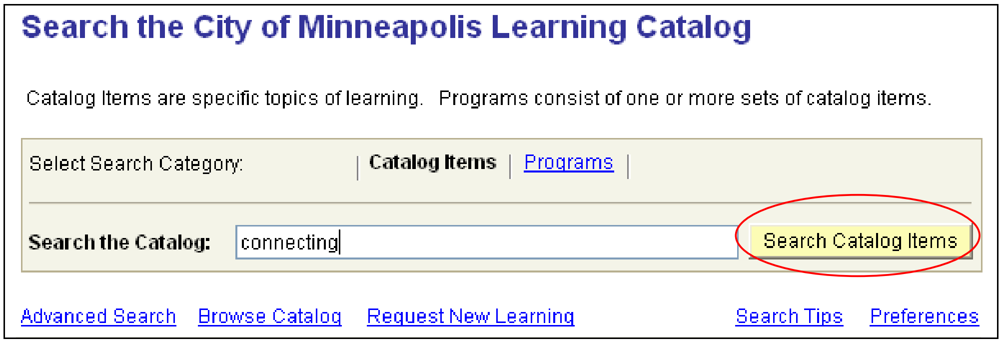
1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

2) Click **Team Learning** on the Menu.

3) Click on Search Catalog.

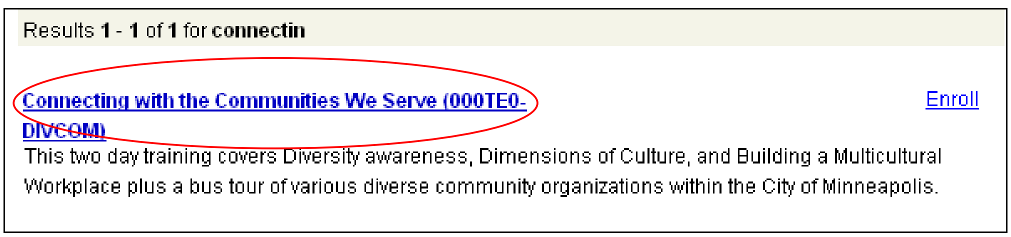


4) Type in part or all of the course title in the field box and then click the **Search Catalog Items** button (Search Catalog Items).



***NOTE:** Results will bring back any instance of the search word in the course title or course description. It is often easier to search using key words instead of a full course title.*

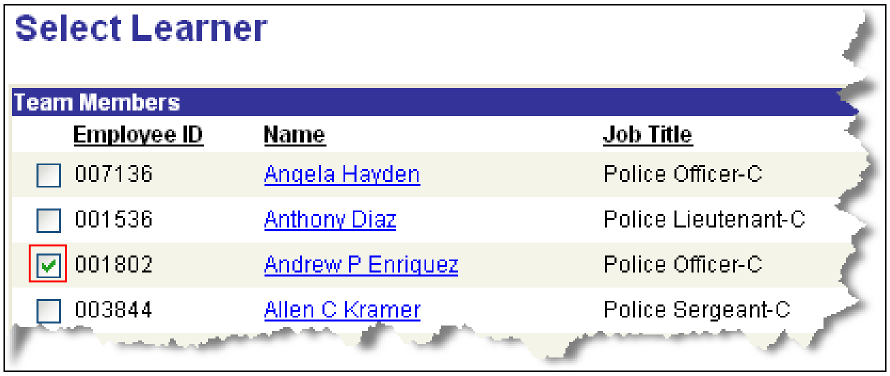
5) Locate the desired activity from the list of search results and click on the course title link.



6) Click on the **Add Item to Plan** button (Add Item To Plan) at the bottom of the page.

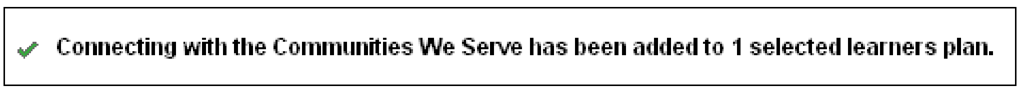
***IMPORTANT NOTE!** DO NOT click the **Add to Plan** button. The employee will not be contacted when another session is scheduled.*

7) Click on the check box ( ) next to the Team Member's Name.



8) The **Group Actions** dropdown list will read 'Add to Plan'. Click on the **Go** button (Go).

9) You will receive a confirmation notice.



NOTE: *You and your employee will receive a system email notification that the class was added to their training plan.*

Supplemental Learning

Supplemental Learning is used to record training that is NOT listed specifically on the City's Learning Catalog. For example, if an employee attended a conference or workshop conducted by an outside vendor, you could record their participation.

Employees should show some type of proof they attended the outside workshop e.g., Certificate of Completion. (If an employee has added the supplemental learning themselves, see page 67 to verify the supplemental learning.)

Supplemental Learning Types	
Conference/Seminar	A conference or seminar is a gathering in which people with a common interest participate in discussions and/or listen to lectures on a specialized topic. Generally the topic is related to the attendee's field or current position.
Workshop	A workshop is a gathering or training session which emphasizes problem-solving, hands-on training, and requires the involvement of the participants.
On-the-job Training	On-the-job training occurs in a normal working situation, using the actual tools, equipment, documents or materials that will be used when the participant is fully trained.

Continuing Education	Continuing Education involves college/university credit-granting or non-credit-granting courses where Continuing Education Units (CEUs) are granted. This type of learning is often obtained through a university extension school or community college.
Self Paced Learning	Self-Paced Learning is learning that is initiated and directed by the learner. This includes learning done via CD or e-learning.
Project Work	Project Work has a defined beginning and end, unique goals and objectives, and key deliverables such as a product, service or result.

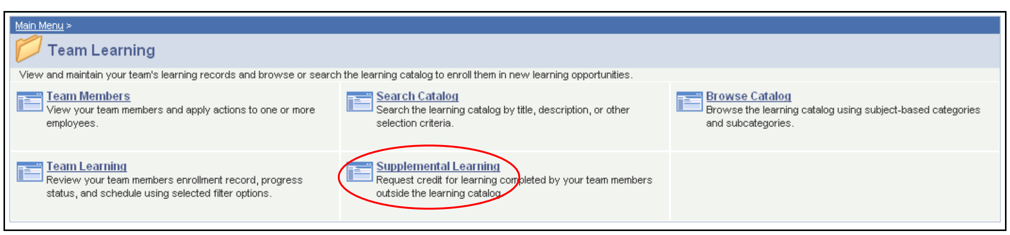
IMPORTANT NOTE! *DO NOT add Emergency Preparedness Training to Supplemental Learning. Emergency Preparedness Training should be stored in HRIS Licenses and Certifications. Contact Sandy.Allshouse@ci.minneapolis.mn.us.*

Add Supplemental Learning for Team Member

1) Navigate to HRIS Learning Management, click on the Learning and Development link.

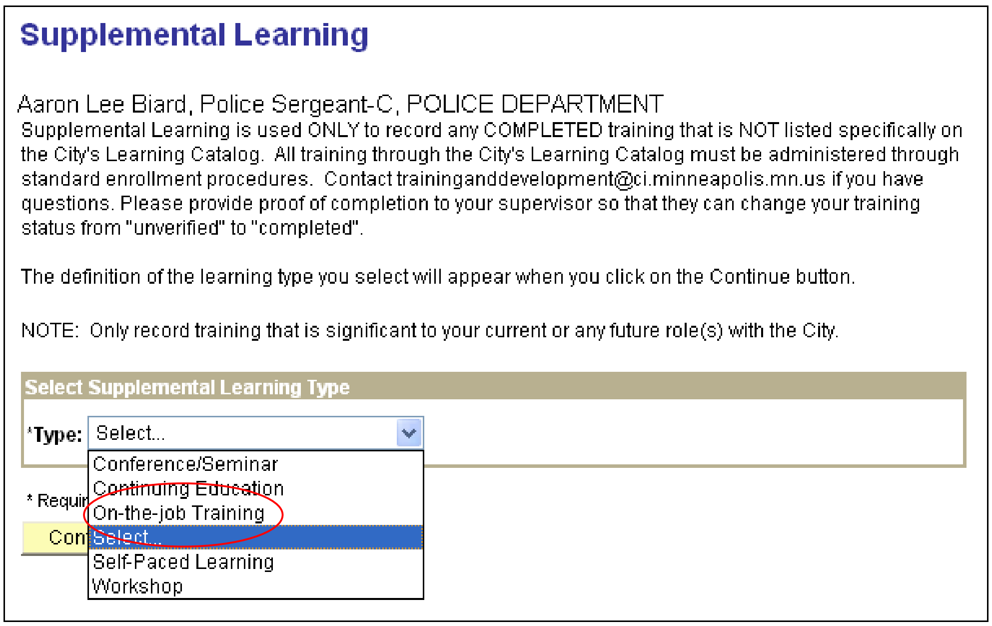
2) Click **Team Learning** on the Menu.

3) Click on the Supplemental Learning link.



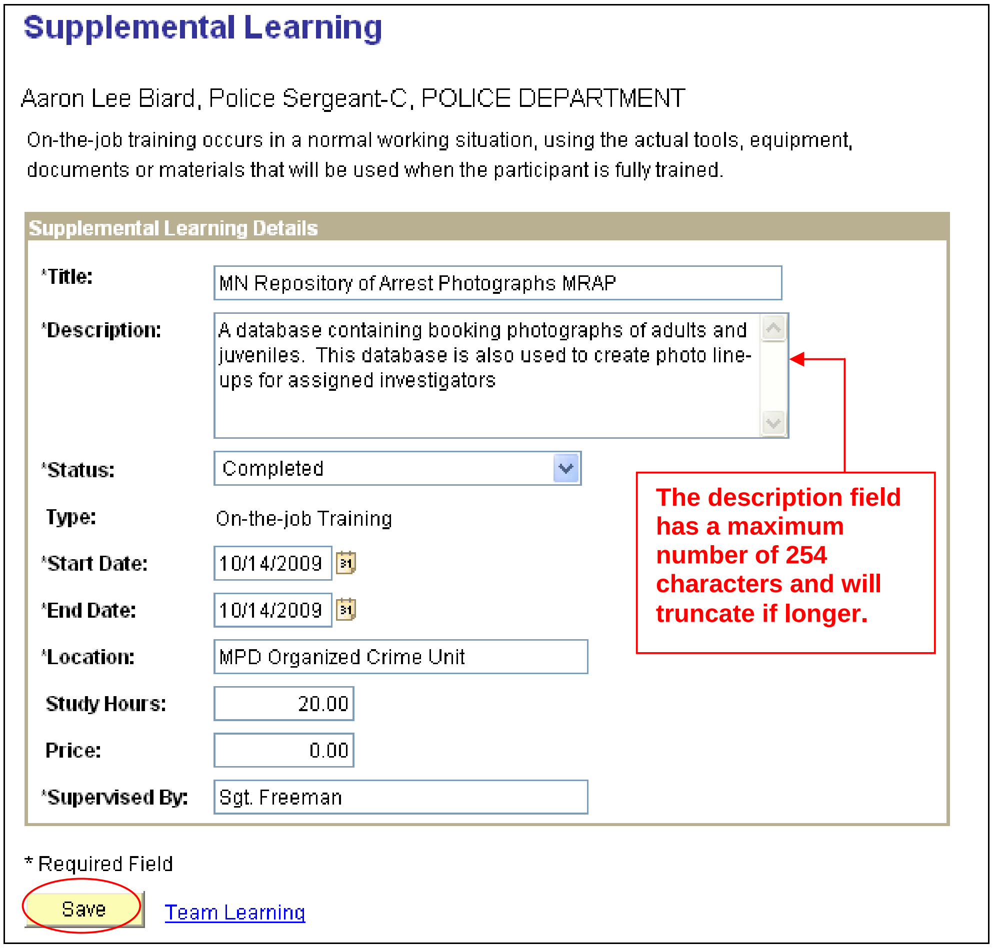
4) Click the **Add** button (Add) next to the Team Member's name.

5) Select the appropriate **Supplemental Learning Type** from the dropdown list.



6) Click the Continue button (Continue).

7) Type the appropriate information in the provided fields--fields with an asterisk (*) are required--and then click the **Save** button (Save).



Verify Supplemental Learning for Team Member

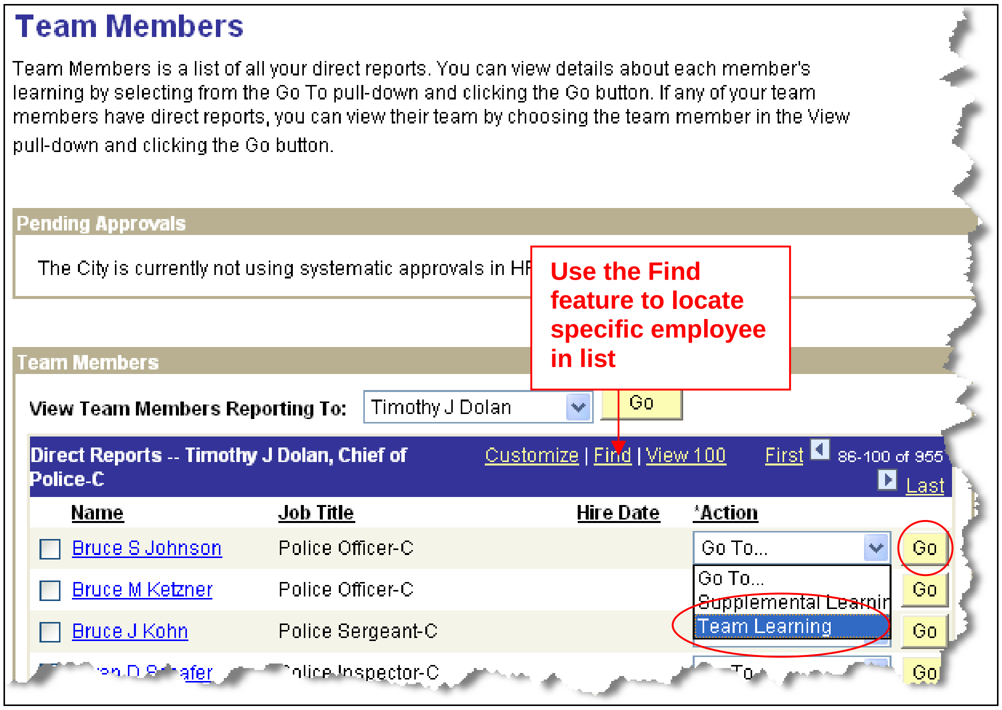
Supervisors will receive a system email indicating an employee added supplemental learning and action needs to be taken to verify.

1) Navigate to **HRIS Learning Management**, click on the Learning and Development link.

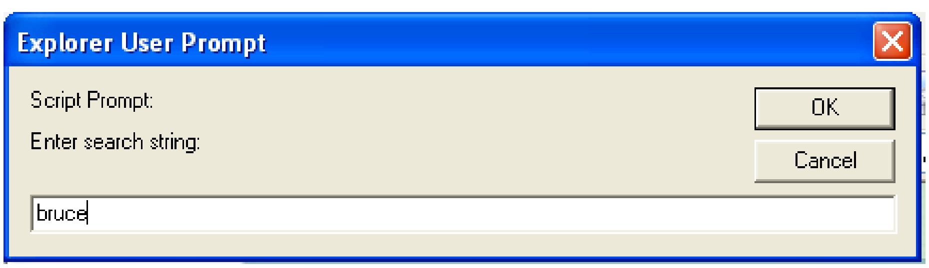
2) Click **Team Learning** on the Menu.

3) Click on the Team Members link.

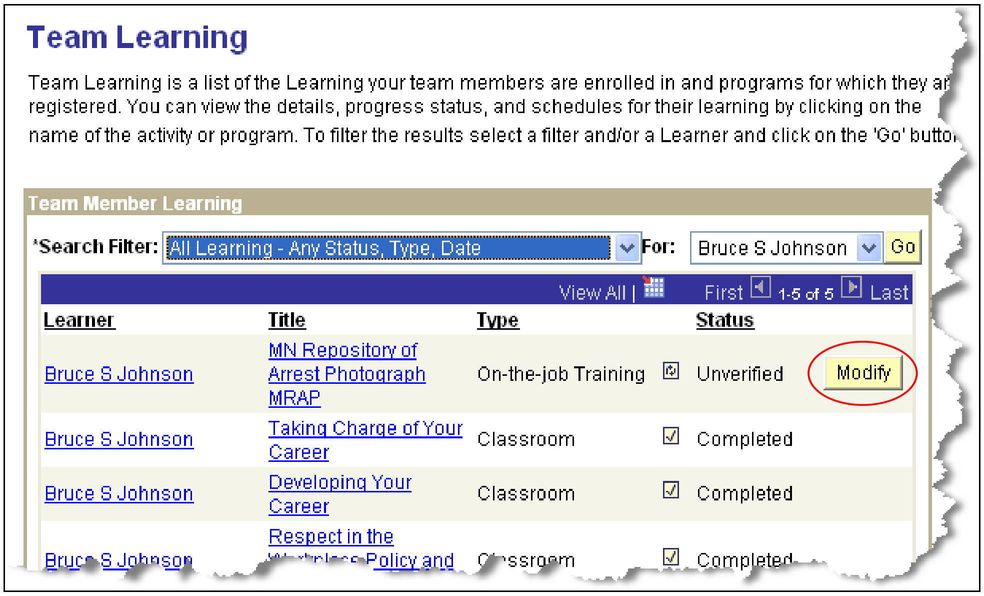
4) Select **Team Learning** from the **Action** drop down list for the employee you want to verify supplemental learning and then click the **Go** button (Go).



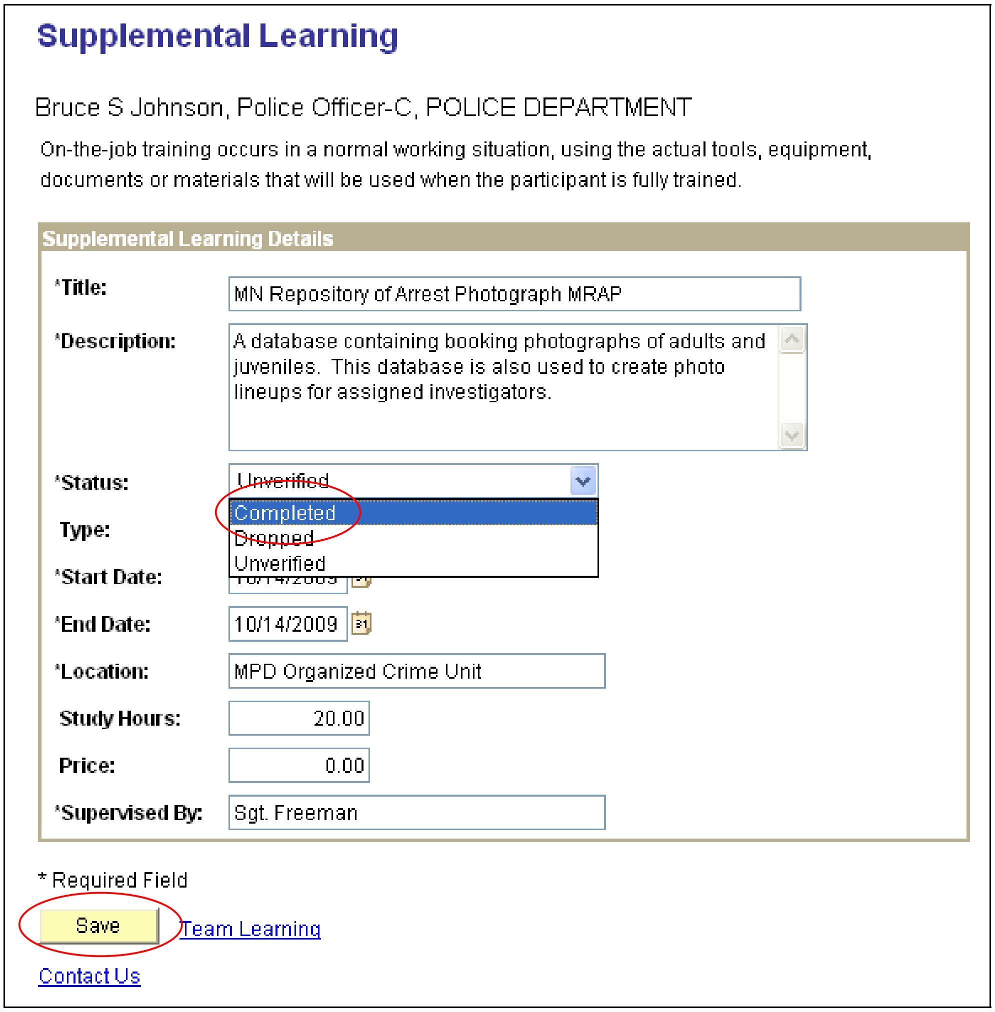
NOTE: *If you have a lot of direct reports, you can use the Find feature to narrow the search results. In the example above, "bruce" was typed in the search box.*



5) The employee's learning summary will be displayed. Click the **Modify** button (Modify).


Team Learning
Team Learning is a list of the Learning your team members are enrolled in and programs for which they ar
registered. You can view the details, progress status, and schedules for their learning by clicking on the
name of the activity or program. To filter the results select a filter and/or a Learner and click on the 'Go' butto
Team Member Learning
*Search Filter:
All Learning - Any Status, Type, Date
For:
Bruce S Johnson
Go
View All |
First
1-5 of 5
Last
Learner
Title
Type
Status
Bruce S Johnson
MN Repository of Arrest Photograph MRAP
On-the-job Training
Unverified
Modify
Bruce S Johnson
Taking Charge of Your Career
Classroom
Completed
Bruce S Johnson
Developing Your Career
Classroom
Completed
Respect in the

6) Change the **Status** from 'Unverified" to 'Completed' using the dropdown list and then click the **Save** button (Save).



Supplemental Learning

Bruce S Johnson, Police Officer-C, POLICE DEPARTMENT

On-the-job training occurs in a normal working situation, using the actual tools, equipment, documents or materials that will be used when the participant is fully trained.

Supplemental Learning Details

***Title:**	MN Repository of Arrest Photograph MRAP
***Description:**	A database containing booking photographs of adults and juveniles. This database is also used to create photo lineups for assigned investigators.
***Status:**	Unverified (Completed / Dropped / Unverified)
Type:	
***Start Date:**	
***End Date:**	10/14/2009
***Location:**	MPD Organized Crime Unit
Study Hours:	20.00
Price:	0.00
***Supervised By:**	Sgt. Freeman

* Required Field

Save Team Learning

Contact Us

7) You will receive a confirmation notice on the screen.

You have successfully updated the supplemental learning MN Repository of Arrest Photograph MRAP for Bruce S Johnson with Completed status.

Appendix A: Employee Job Change Form

Employee Job Change Form

*Employee ID Number:		*Employee Name:	
*Effective date of Action:		*Action/Reasons:	

*Are these changes permanent?	☐ Yes	☐ No	If temporary, indicate expected end date:
*Is this a Detail?	☐ Yes	☐ No	
*Is this a Concurrent Job?	☐ Yes	☐ No	

*Dept Code: | Location Code: | Company Code:

*Job Code/Job Title:

Position Number (if applicable):

REGULAR/TEMPORAY/SEASONAL STATUS	HOURS STATUS
	☐ Full-Time
	☐ Part-Time (enter hours per week):
	☐ Intermittent (enter approximate hrs per week):
EMPLOYEE CLASS	CLASSIFIED INDICATOR
PAY GROUP (if Detail use postive pay group for all records):	STANDARD HOURS PER WEEK (use 0 for details or intermittent):

Salary Adm Plan	Salary Grade	Current Step	New Step	Current Base Rate	New Base Rate

JOB EARNINGS DISTRIBUTION (Combo Code)

Percent	Earn Code	Fund	Department	Task	Project	Activity
	REG					
	REG					
	REG					

PROBATION					PROBATION END DATE	DATE LAST WORKED
☐ None	☐ 3 Months	☐ 6 months	☐ 12 months	☐ Other		

Union Code	New Union Code	Officer Code		FICA Status		
		☐ Non-Sworn	☐ Sworn	☐ Exempt	☐ Medicare Only	☐ Subject

Requires SEI (Statement of Economic Interest) ☐ No ☐ Yes

*Submitted By (type or print name below)	*Date - enter below
*Approved By (Signature of authorized department representative below)	*Date - enter below
*If Transfer (Signature of accepting department representative below)	*Date - enter below
*If Transfer or Voluntary Demontion (Employee Signature below)	*Date - enter below
*Entered into HRIS by (HRIS Representative Signature below)	*Date - enter below

Information | Employee Job Change Form | Action Reasons | Departments | Company | Job Codes | RTS-Empl C

__NOTE:__ This is a multi-purpose form, click on the __Information Tab__ for the list of uses. It is important you have the employee __Job Data__ record open in HRIS while working on this form.

Appendix B: Management Report Terminology

Annual Rate	Stated annual amount of base compensation paid to employee; assumes employee is working full-time throughout the entire calendar year.
Class Grade	The Grade Level of the Job Classification the employee is working in.
Comp Balance	Employee hours available to take paid compensatory time away from work in lieu of sick or vacation time. Not all employees are eligible to earn compensatory time.
Comp YTD Taken	Total compensatory hours taken or reported by the employee during the current calendar year. Compensatory hours can be reported in lieu of sick or vacation hours assuming the employee is eligible to earn comp time and has sufficient hours to do so.
Department Description	City organizational unit where employee is assigned to work; generally source of funding for employee wages and benefits.
Disabled	Indicates Yes or No if the employee has declared themselves as having a disability. This is self-reported by the employee.
EEO-4 Category	An official federal designation used to indicate a category of jobs or occupations. Each City job is assigned an appropriate designation and used for reporting employment figures to the U.S. Equal Employment Opportunity Commission on an annual basis.
Emplid	Unique identification number assigned to each employee by the City HRIS application.
Employee Class	Indicates employment status of the incumbent: Defaults from the position. If there is not position the user must select the appropriate class.
Employee Name	Employee’s official name – should match name appearing on individual’s Social Security Card.
Ethnicity	A person's identification or affiliation that results from racial or cultural ties.
FICA Status	Used for Payroll processing and indicates whether an employee has FICA deductions.
FLSA Status	Identifies Exempt/Non-Exempt status for the job code and should not be changed by users.
Full Time Equivalent (FTE)	Used to identify full-time and part-time budgeted positions. FTE should be blank for Permits, Details, Concurrent Jobs, intermittent and ancillary employees.
Full/Part Time	Indicates hours worked by the employee per week (e.g, 40 hours, 20 hours, etc.).

Gender	Identifies the gender of the employee (male/female)
Gross Wages	Total amount of wages an employee earns.
Job Entry Date	Identifies the date the employee began working in the Job Code.
Job Title	Name associated with the specific Job Code.
Last Hire Date	The most recent hire date for employees. Where there has been a break in service, this date will be different from the "Original Hire Date".
Leave Accrual Date	This date drives the negotiated increases in the rate of vacation accrual.
Location Description	City organizational unit at lower level than Department where employee is assigned to work. This may or may not be the same as Department depending on the Department's need to further segregate their employee pool.
Longevity Date	This data drives longevity pay. Only Central HR should change this date if necessary.
Officer Code	Indicates Sworn (Fire & Police only) or Non-Sworn (Civilian) status.
Original Hire Date	The date the employee was originally hired, this date never changes.
Overtime Earnings	The amount an employee earns as a result of working overtime hours.
Overtime Hours	The number of hours an employee works in a week that exceeds 40 hours. Please note there are exceptions to this and collective bargaining agreements should be consulted.
Pension Plan	The specific pension plan an employee is a member. In most cases this is determined by when the employee was hired and/or what department or organization the employee was hired into. For a listing of the specific pension plans, see the listing under Retirement Formulas below.
Position Number	A unique identifier assigned to a specific position within the department.
Probation Date	This is the date the employee will complete their probation.
Rate Step	The employee's current rate step on the union contract's salary schedule.
Record Number	Distinguishes between the employee's primary job (Rcd# = 0) versus other detail assignments (Rcd# > 0).
Reg/Temp	Indicates permanence of employment status: Regular = Permanent; Temporary = Non Permanent; Seasonal is used only for Seasonal employees of certain unions (mostly Public Works)
Standard Hours	The number of hours an employee works on a weekly basis. For full-time regular employees this number is 40.
Rehire Date	The date an employee that terminated their employment with City and/or one of the Independent Boards or Agency but was subsequently hired again
Reports To Name	Employee's direct supervisor responsible for providing day-to-day direction to the employee, approving absences and timesheets, and conducting annual performance reviews.
Retirement Formulas	PERA Normal Retirement - Age 65 with at least three years of service OR If hired before July 1, 1989, Rule of 90 (Age + Service = 90) qualifies for normal retirement. MERF - Age 60 with at least three years of service OR 30 years of service at any age. Police/Fire PERA - Age 55 with at least three years of service OR If hired before 7-1-1989 Rule of 90 (Age + Service = 90) qualifies for normal retirement.

	Fire Relief Association - Age 50 with 25 yrs of service provides the maximum benefit available for normal retirement. Police Relief Association - Age 50 with 25 yrs of service provides the maximum benefit available for normal retirement. MPHA Pension Plan - Age 65 is considered “normal retirement.” MCDA Pension Plan - Age 65 is considered “normal retirement.”
Review Due Date	The date the employee’s performance review should be completed.
Review Status	Indicates if the review has been Completed, Scheduled or Waived.
Review Type	Indicates either an Annual or Probation review.
Salary Grade	Labels the set of salary steps or range of salaries that are approved for the job title. This information defaults from the Position or Job Code.
Salary Plan	Labels the set of salary steps or range of salaries that are approved for the job title. This information defaults from the Position or Job Code.
Sick Balance	The number of hours of sick leave an employee has accrued and has available to use.
Sick YTD Taken	The number of sick leave hours an employee has used year to date.
Standard Hours	Full-time hours worked per week defaults from the Job Code. The standard hours should be changed for Part-time and intermittent employees. (most intermittent have 0 standard hours)
Payroll Status	Employment status with the City; “active” status generally applies to all employees currently working for the City, on a paid or unpaid leave of absence, or suspended from duty. Other employment statuses not considered “active” include retired, terminated, deceased, etc.
Union Code	Identifies the bargaining unit associated with the Job Code.
Vac Balance	The number of hours of vacation leave an employee has accrued and has available to use.
Vac YTD Taken	The number of hours of vacation leave an employee has used year to date.
Veteran’s Status	Identifies the employee veteran’s status based on documentation provided by the employee. (e.g., veteran, disabled veteran, spouse of deceased veteran, etc.)
Workforce Planning	Workforce Planning is a process designed to help management think about the future of their organization and to plan and identify the specific actions they will need to take to prepare their workforce and department for that future. To be effective an organizations workforce plan must be linked to its strategic direction and integrated into its business plan and operating philosophy.