



Miami-Dade County

Manage Voluntary Charitable Contributions Job Aid

Version 1.0

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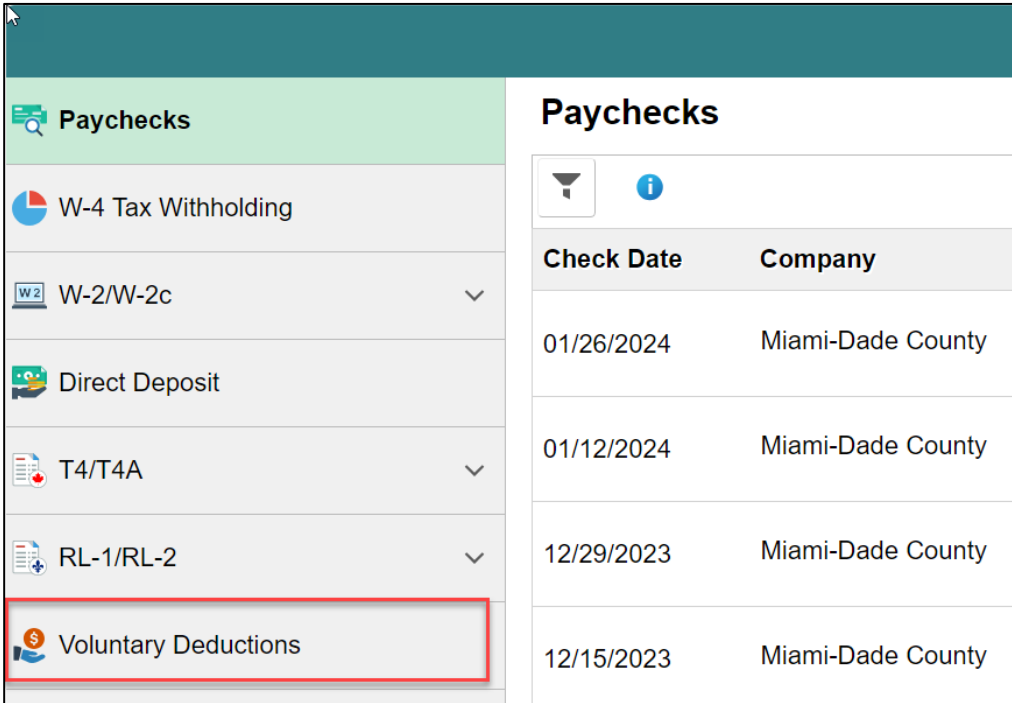
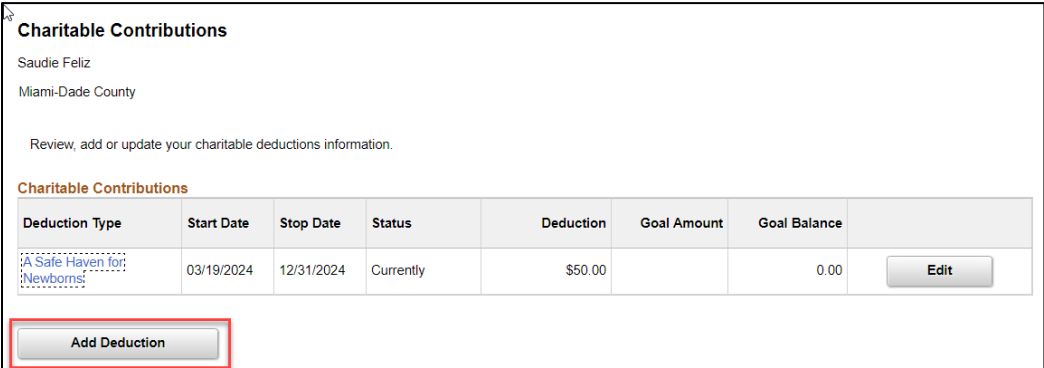
PURPOSE

This job aid provides instructions on managing your Voluntary Charitable Contributions through Employee Self-Service pursuant to [Resolution R-1026-23](#), adopted by the Board of County Commissioners (BCC) on November 7, 2023. This document is for all employees.

Here are some key points to keep in mind about managing voluntary charitable contributions online:

- You can enter as many voluntary charitable contributions as you like online for any amount
- Deductions may not appear in your next paycheck, depending on the timing of your entry.
- Deductions will continue until either you reach your specified goal amount or the stop date you specified is reached.
- You do not have to specify a stop date or goal amount.
- The system automatically keeps track of your deduction balances if you have entered a goal amount
- You can cancel a deduction by entering a stop date or changing the goal balance to equal the current deduction balance.
- Voluntary charitable contributions are limited to the charities available within INFORMS and will be expanded upon approval by the BCC.

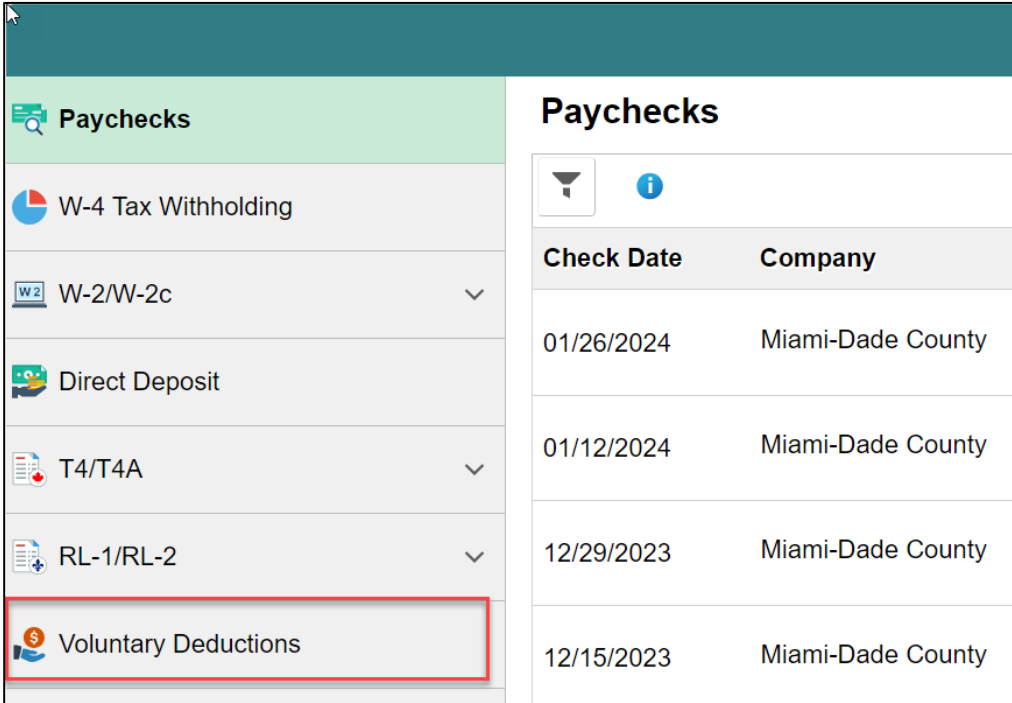
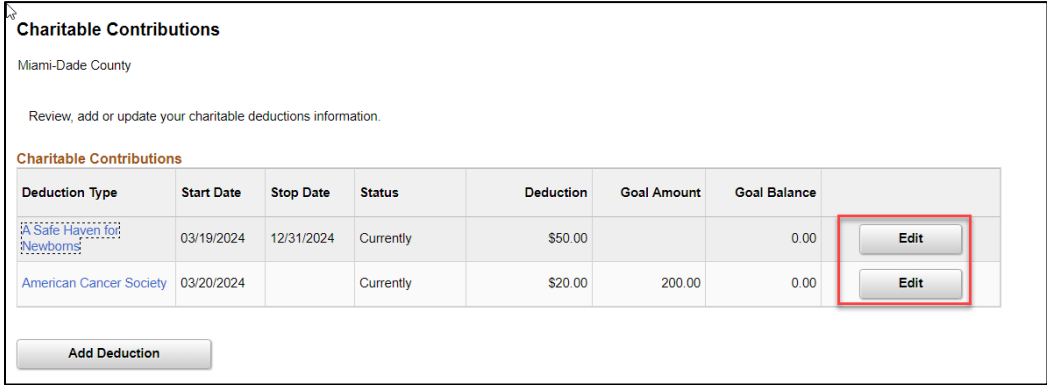
ADDING A VOLUNTARY CHARITABLE CONTRIBUTIONS

Step	Action																
1.	Log into INFORMS and navigate to: Employee Self-Service > Payroll																
2.	<p>Select Voluntary Deductions from the menu selection on the left-hand pane.</p>  <p>The screenshot shows a sidebar menu on the left with the following items: Paychecks (highlighted in green), W-4 Tax Withholding, W-2/W-2c, Direct Deposit, T4/T4A, RL-1/RL-2, and Voluntary Deductions (highlighted with a red border). The main content area is titled 'Paychecks' and contains a table with the following data:</p> <table border="1" data-bbox="906 674 1386 1220"> <thead> <tr> <th>Check Date</th> <th>Company</th> </tr> </thead> <tbody> <tr> <td>01/26/2024</td> <td>Miami-Dade County</td> </tr> <tr> <td>01/12/2024</td> <td>Miami-Dade County</td> </tr> <tr> <td>12/29/2023</td> <td>Miami-Dade County</td> </tr> <tr> <td>12/15/2023</td> <td>Miami-Dade County</td> </tr> </tbody> </table>	Check Date	Company	01/26/2024	Miami-Dade County	01/12/2024	Miami-Dade County	12/29/2023	Miami-Dade County	12/15/2023	Miami-Dade County						
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3.	<p>Click on the Add Deduction button on the Charitable Contributions Summary page.</p>  <p>The screenshot shows the 'Charitable Contributions' page for Saudie Feliz at Miami-Dade County. It includes a table of existing contributions and an 'Add Deduction' button highlighted with a red border.</p> <table border="1" data-bbox="386 1499 1395 1596"> <thead> <tr> <th>Deduction Type</th> <th>Start Date</th> <th>Stop Date</th> <th>Status</th> <th>Deduction</th> <th>Goal Amount</th> <th>Goal Balance</th> <th></th> </tr> </thead> <tbody> <tr> <td>A Safe Haven for Newborns</td> <td>03/19/2024</td> <td>12/31/2024</td> <td>Currently</td> <td>\$50.00</td> <td></td> <td>0.00</td> <td><input type="button" value="Edit"/></td> </tr> </tbody> </table>	Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance		A Safe Haven for Newborns	03/19/2024	12/31/2024	Currently	\$50.00		0.00	<input type="button" value="Edit"/>
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance											
A Safe Haven for Newborns	03/19/2024	12/31/2024	Currently	\$50.00		0.00	<input type="button" value="Edit"/>										

Step	Action
4.	<p>In the Charitable Contributions detail page:</p> <ul style="list-style-type: none">• Click on the magnifying glass icon next to *Type of Deduction to select from a list of available deductions.• Select whether the deduction will be a Flat Amount or Percent• Enter the Amount or Percent to be deducted• <i>(Optional)</i> Enter a Goal Amount• Enter a Deduction Start Date• <i>(Optional)</i> Enter a Deduction Stop Date• Finally, select the Submit button <div data-bbox="370 726 1406 1285"><p>Charitable Contributions</p><p>Add Charitable Contribution</p><p>Saudie Feliz Miami-Dade County</p><div data-bbox="586 848 1386 1192"><p>*Type of Deduction American Cancer Society</p><p>*Select whether Deduction is a Flat Amount or Percent Amount</p><p>*Enter Amount or Percent to be deducted 20.00</p><p>Take deduction until I reach this Goal Amount 200</p><p>*Enter Deduction Start Date as MM/DD/YYYY 03/20/2024</p><p>Enter Deduction Stop Date as MM/DD/YYYY</p><p>Current Balance 0.00</p></div><p>Submit</p><p>* Required Field</p></div> <p>In this example \$20 will be taken every pay period until the employee reaches the \$200 Goal Amount. The employee will have the deduction for approximately 10 pay periods.</p> <p>The Goal Amount field is optional, if left blank the employee will continue to be deducted until they choose to enter a Stop Date.</p>

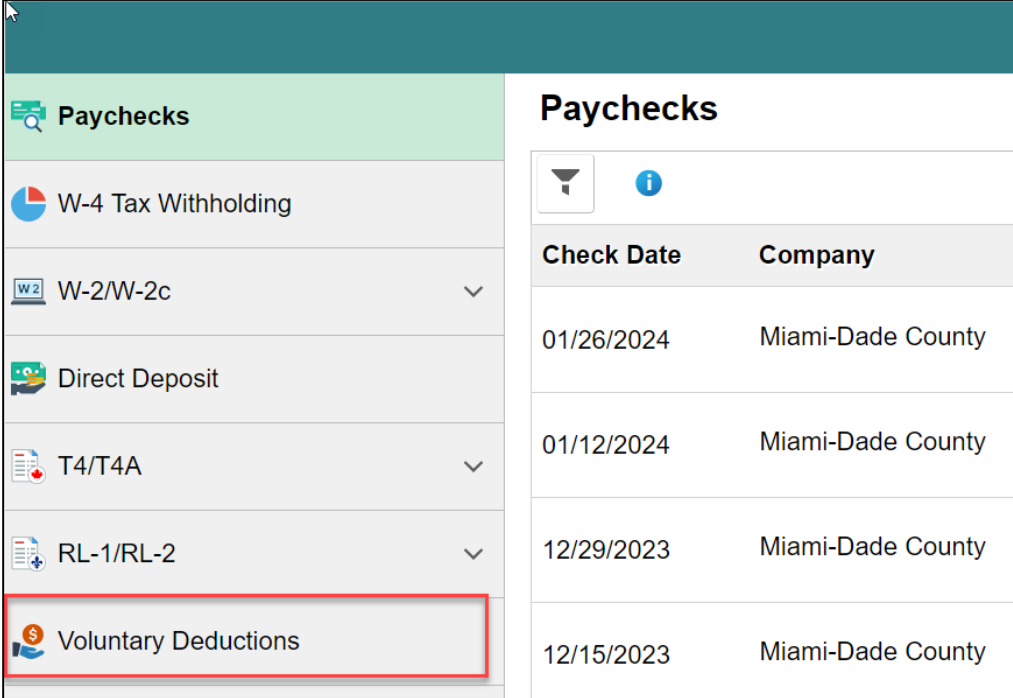
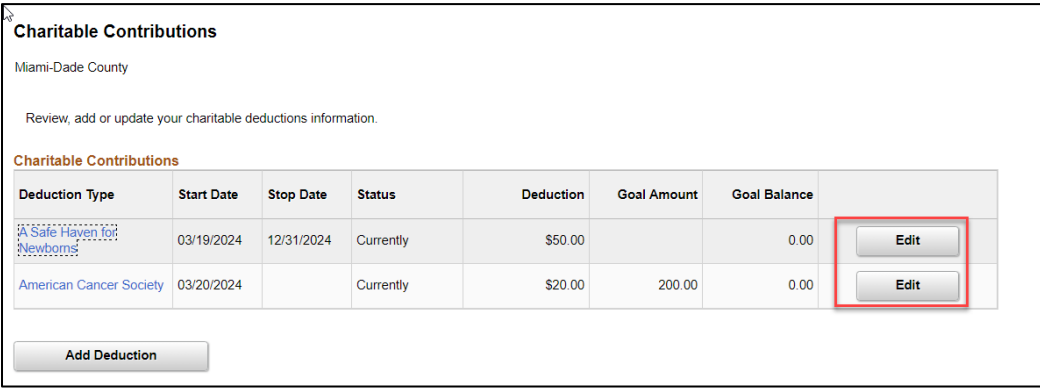
Step	Action
5.	<p>You will receive a confirmation message upon submission. Select the OK button.</p> <div data-bbox="370 411 1408 737"><p>Charitable Contributions</p><hr/><p>Submit Confirmation</p><p><input checked="" type="checkbox"/> The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.</p><p>OK</p></div>

EDITING AN EXISTING VOLUNTARY CHARITABLE CONTRIBUTION

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1.	Log into INFORMS and navigate to: Employee Self-Service > Payroll																								
2.	<p>Select Voluntary Deductions from the menu selection on the left-hand pane.</p>  <table border="1" data-bbox="906 674 1386 1220"> <caption>Paychecks</caption> <thead> <tr> <th>Check Date</th> <th>Company</th> </tr> </thead> <tbody> <tr> <td>01/26/2024</td> <td>Miami-Dade County</td> </tr> <tr> <td>01/12/2024</td> <td>Miami-Dade County</td> </tr> <tr> <td>12/29/2023</td> <td>Miami-Dade County</td> </tr> <tr> <td>12/15/2023</td> <td>Miami-Dade County</td> </tr> </tbody> </table>	Check Date	Company	01/26/2024	Miami-Dade County	01/12/2024	Miami-Dade County	12/29/2023	Miami-Dade County	12/15/2023	Miami-Dade County														
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3.	<p>Click on the Edit button on the Charitable Contributions summary page.</p>  <table border="1" data-bbox="380 1472 1360 1610"> <caption>Charitable Contributions</caption> <thead> <tr> <th>Deduction Type</th> <th>Start Date</th> <th>Stop Date</th> <th>Status</th> <th>Deduction</th> <th>Goal Amount</th> <th>Goal Balance</th> <th></th> </tr> </thead> <tbody> <tr> <td>A Safe Haven for Newborns</td> <td>03/19/2024</td> <td>12/31/2024</td> <td>Currently</td> <td>\$50.00</td> <td></td> <td>0.00</td> <td><input type="button" value="Edit"/></td> </tr> <tr> <td>American Cancer Society</td> <td>03/20/2024</td> <td></td> <td>Currently</td> <td>\$20.00</td> <td>200.00</td> <td>0.00</td> <td><input type="button" value="Edit"/></td> </tr> </tbody> </table>	Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance		A Safe Haven for Newborns	03/19/2024	12/31/2024	Currently	\$50.00		0.00	<input type="button" value="Edit"/>	American Cancer Society	03/20/2024		Currently	\$20.00	200.00	0.00	<input type="button" value="Edit"/>
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Step	Action
4.	<p>In the Charitable Contributions detail page, you have the option of editing:</p> <ul style="list-style-type: none">• Type of Deduction• Deduct as a flat Amount or percent• Amount or Percent to be deducted bi-weekly.• Goal Amount• Stop Date• Finally, select the Submit button when all updates are made. <div data-bbox="370 682 1409 1201"><p>The screenshot shows the 'Charitable Contributions' page for Miami-Dade County. A red box highlights the following fields: '*Type of Deduction' (American Cancer Society), '*Select whether Deduction is a Flat Amount or Percent' (Amount), '*Enter Amount or Percent to be deducted' (20.00), 'Take deduction until I reach this Goal Amount' (200.00), '*Enter Deduction Start Date as MM/DD/YYYY' (03/20/2024), 'Enter Deduction Stop Date as MM/DD/YYYY' (calendar icon), and 'Current Balance' (0.00). A 'Submit' button is also highlighted with a red box. A note at the bottom left of the screenshot states '* Required Field'.</p></div>
5.	<p>You will receive a confirmation message upon submission. Select the OK button.</p> <div data-bbox="370 1339 1409 1703"><p>The screenshot shows a 'Submit Confirmation' message. It includes a green checkmark icon and the text: 'The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.' An 'OK' button is located at the bottom of the message box.</p></div>

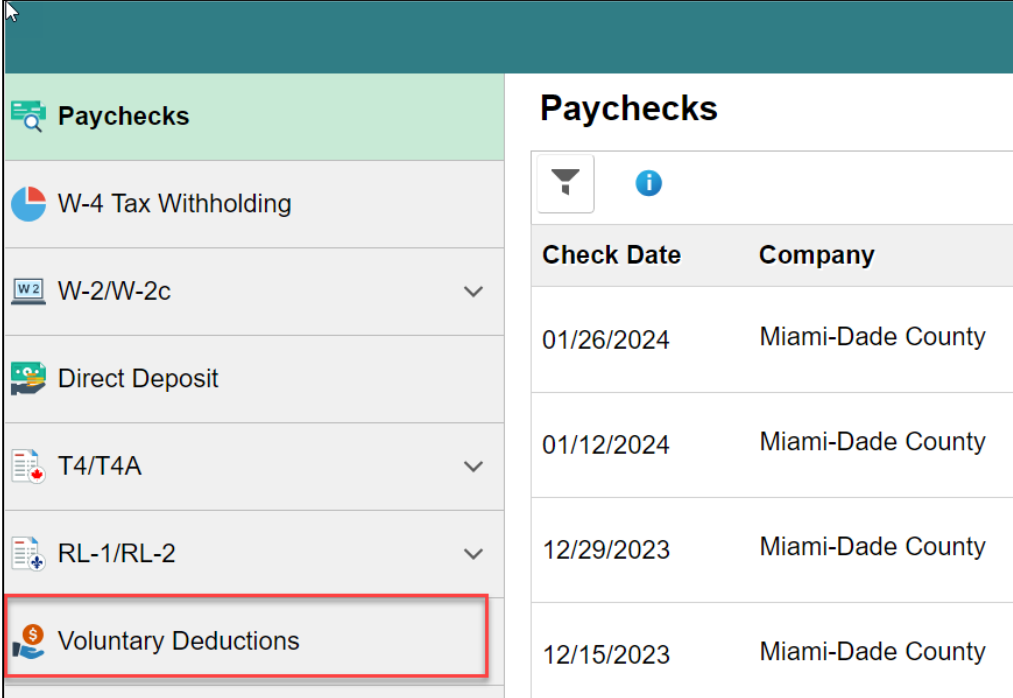
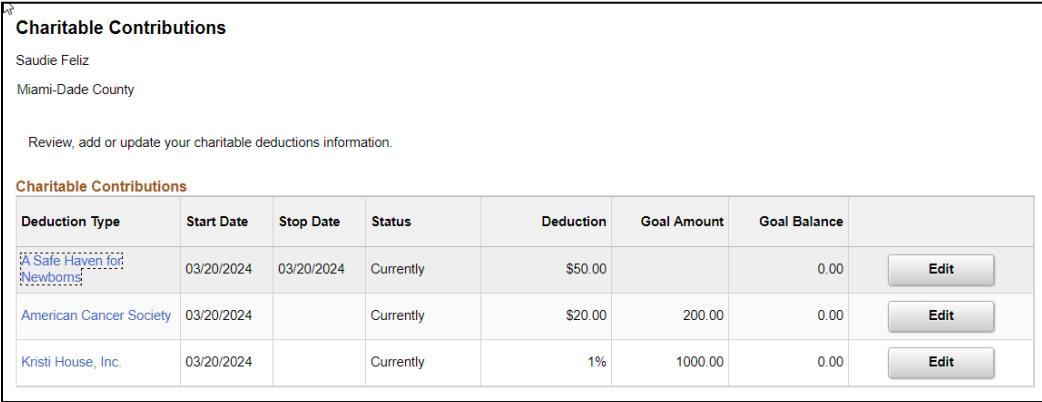
ENDING AN EXISTING VOLUNTARY CHARITABLE CONTRIBUTION

Step	Action
1.	Log into INFORMS and navigate to: Employee Self-Service > Payroll
2.	<p>Select Voluntary Deductions from the menu selection on the left-hand pane.</p> 
3.	<p>Click on the Edit button on the Charitable Contributions summary page.</p> 

Step	Action
4.	<p>In the Charitable Contributions Detail page:</p> <ul style="list-style-type: none">• Add a deduction Stop Date• Select the Submit button when the update is made. <p>Please note the following:</p> <ul style="list-style-type: none">• If Deduction Stop Date is the same as Deduction Start Date, the deduction will not be taken.• If an amount is entered in the Goal Amount field and a Stop Date is entered, the deduction will stop at stop date regardless of whether the goal amount has been reached. <div data-bbox="370 779 1409 1367"><p>Charitable Contributions</p><h3>Change Voluntary Deduction</h3><p>Saudie Feliz Miami-Dade County</p><p>*Type of Deduction A Safe Haven for Newborns</p><p>*Select whether Deduction is a Flat Amount or Percent Amount <input type="text" value="Amount"/></p><p>*Enter Amount or Percent to be deducted 50.00</p><p>Take deduction until I reach this Goal Amount</p><p>*Enter Deduction Start Date as MM/DD/YYYY 03/20/2024</p><p>Enter Deduction Stop Date as MM/DD/YYYY 03/20/2024 <input type="text" value="03/20/2024"/></p><p>Current Balance 0.00</p><p>Submit</p><p>* Required Field</p></div>

Step	Action
5.	<p>You will receive a confirmation message upon submission. Select the OK button.</p> <div data-bbox="370 411 1408 793" style="border: 1px solid black; padding: 10px;"> <p>Charitable Contributions</p> <hr/> <p>Submit Confirmation</p> <p><input checked="" type="checkbox"/> The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.</p> <div data-bbox="375 699 548 787" style="border: 2px solid red; padding: 5px; display: inline-block;"> <input type="button" value="OK"/> </div> </div>

VIEWING VOLUNTARY CHARITABLE CONTRIBUTIONS

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3.	<p>The Charitable Contributions summary page is shown. This page will show all your voluntary charitable contributions.</p> <p>**The Goal balance will reflect the balance of what has currently been deducted.</p>  <table border="1" data-bbox="381 1596 1396 1785"> <thead> <tr> <th>Deduction Type</th> <th>Start Date</th> <th>Stop Date</th> <th>Status</th> <th>Deduction</th> <th>Goal Amount</th> <th>Goal Balance</th> <th></th> </tr> </thead> <tbody> <tr> <td>A Safe Haven for Newborns</td> <td>03/20/2024</td> <td>03/20/2024</td> <td>Currently</td> <td>\$50.00</td> <td></td> <td>0.00</td> <td>Edit</td> </tr> <tr> <td>American Cancer Society</td> <td>03/20/2024</td> <td></td> <td>Currently</td> <td>\$20.00</td> <td>200.00</td> <td>0.00</td> <td>Edit</td> </tr> <tr> <td>Kristi House, Inc.</td> <td>03/20/2024</td> <td></td> <td>Currently</td> <td>1%</td> <td>1000.00</td> <td>0.00</td> <td>Edit</td> </tr> </tbody> </table>	Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance		A Safe Haven for Newborns	03/20/2024	03/20/2024	Currently	\$50.00		0.00	Edit	American Cancer Society	03/20/2024		Currently	\$20.00	200.00	0.00	Edit	Kristi House, Inc.	03/20/2024		Currently	1%	1000.00	0.00	Edit
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