



# HRIS Job Role Training

Name Change

Forms: XP52

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## Introduction

HRIS requires that a personnel action be performed when an Employee requests a change to his/her name. This Name Change could be the result of a Marriage, Divorce or Legal Name Change.

The Human Resources (HR) Initiator/Approver performs the Name Change Action using the *Individual Action Form (XP52.1)*. The *Individual Action Form (XP52.1)* displays the current information for the Employee along with fields to enter the new information.

This action should only be used if just the Employee's name is changing. If the Employee wants to change any other information on his/her record (Address, Supplemental Address, Home Phone, etc), use the 'PERSONAL' Action—NOT the Name Change Action.

### Notes

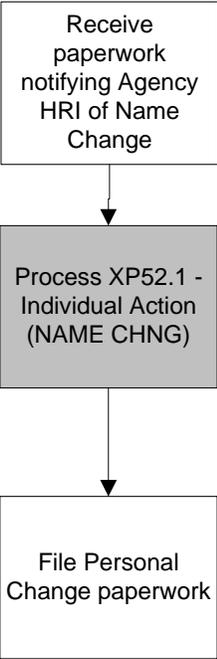
- When processing a personnel action, HRIS requires that a Reason Code be supplied for the action being performed. HRIS displays the results of all processed personnel actions on various management reports. Detailed information (if required) can be displayed by running the report based on selected Reason Codes.
  - **Example** – Jane Parker, a State of Arizona employee, marries and submits a name change request. The Agency processes the NAME CHNG Action for Jane with the Reason Code "PER-NAME".
- Keeping employee personal information updated in HRIS is extremely important; this information will impact the HR, Benefits and Payroll areas, and is the system of record.
- Failure to properly enter the appropriate data will corrupt the Employee's HRIS history.

# HRIS Name Change Chart

Required forms appear as:



Optional forms appear as:



*See Individual Action (XP52.1) - Parameters Tab (NAME CHNG) (Page 6)*

# Individual Action (XP52.1) - Parameters Tab (NAME CHNG)

The screenshot displays the HRIS State of Arizona interface for an Individual Action (XP52.1) in the Parameters Tab. The interface includes a top navigation bar with a search box (1) containing 'xp52.1' and a toolbar with buttons for Add, Change, Delete, Previous, Inquire (7), Next, and Inquire. A left sidebar contains a 'Home' button. The main content area shows the following details:

- Company: 1 (dropdown) - STATE OF ARIZONA
- Employee: 3 (dropdown) - 12345 - O'CONNAL, BRIAN
- Action, Nbr: 4 (dropdown) - NAME CHNG - NAME CHANGE
- Effective: 5 (calendar) - 07/01/2008
- Reasons: 6 (dropdown) - PER-NAME
- Last Chg Date: 06/17/2006
- Comments: [button]

Below these details are tabs for Parameters, Selected Items 1, Selected Items 2, and Selected Items 3. The Parameters tab is active, showing a 'Main' section with the following fields:

- Immediate: 8 (dropdown) - N - No
- Anticipated End: 9 (calendar)
- Update Benefits: 10 (dropdown)
- Update Required Deductions: 11 (dropdown)
- Old Deduction End Date: 12 (calendar)
- New Deduction Begin Date: 13 (calendar)
- Occurrence Type: 14 (dropdown)
- Participant: 15 (text field)
- Curr Calc: [button]

At the bottom of the screen, there is a 'Done' button and a 'Local intranet' link.

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
1	White Search Box	R	Type XP52.1 in the White Search Box. Press <i>Enter</i> on the keyboard	The Individual Personnel Action (XP52.1) opens.	
2	<b>Company</b> Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	<b>Employee</b> Field	R	Type the Employee's EIN.	System will default the needed information from the employee's record.	You must enter the correct EIN.
4	<b>Action Nbr</b> Field	R	Type or use the Drop Down to enter action ' <b>NAME CHNG</b> .'	Based on the Action Nbr. selected the system will display the appropriate fields that are needed to complete this action.	
5	<b>Effective</b> Field	R	Type the Effective Date of the action.		Date is formatted as MMDDYYYY.
6	<b>Reasons</b> – First Box Field	R	Type or use the Drop Down to enter the reason code for the Personal Information Action.		One reason code is required. The reason codes are smart coded. *Refer back to basics for more information on Reason Codes.
	<b>Reasons</b> - Second Box Field	O	Type or use the Drop Down to enter the 2 <sup>nd</sup> Reason Code for the Pay Change.		The 2 <sup>nd</sup> Reason Code is not required but is recommended to better define the reason for the Personal Information Action. It can be useful for reporting purposes.
7	<b>Inquire</b> Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner.  The system will populate the required fields that are needed to complete the action and will default applicable information from the Employee's record.	DO NOT CLICK Add at this point!
8	<b>Immediate</b> Field	R	Type N or select 'No' from the drop down menu in the Immediate Field.	Action will process with the nightly jobs depending on the effective date of the action.	<b>ONLY New Hire and Rehire Actions are processed immediately.</b> All other HRIS Actions are processed during the nightly batch.
9	<b>Anticipated End</b> Field	R	Leave Blank	This field must be blank.	
10	<b>Update Benefits</b> Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field.
11	<b>Update Required</b>	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	<b>Notes/ Additional Information</b>
	<b>Deductions Field</b>				
12	<b>Old Deduction End Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	
13	<b>New Deduction Begin Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	<b>Occurrence Type Field</b>	R	Leave Blank	This field must be blank.	Do not enter anything into this field.
15	<b>Participant Field</b>	R	Leave Blank	This field must be blank	Do not enter anything into this field. DO NOT CLICK Add at this point – go to Selected Items 1
16	<b>Selected Items 1</b>	R	Click on the <b>Selected Items 1</b> tab located under Related Pages on the left menu pane.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information from the Employee's record will appear in the Current Value Field.



	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	Company field Employee Field Action, Nbr Field Requisition Field Effective Date Field Reasons Fields	R R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
2	Title Field	O	Verify the information that is populated from the Employee's current record.  For information that is changing, type the NEW Title in the Change To field.		The Current Value and Change To values cannot be the same.  See example below.
3	Name-First Field Name-Middle Field Name-Last Field	O O O	Verify the information that is populated from the Employee's current record.  For information that is changing, type the NEW value for that field in the Change To field.		The Current Value and Change To values cannot be the same.  See example below.
4	Name Suffix Field	O	Verify the information that is populated from the Employee's current record.  For information that is changing, type the NEW Name Suffix in the Change To field.		The Current Value and Change To values cannot be the same.  See example below.
5	Preferred Name	O	Verify the information that is populated from the Employee's current record.  For information that is changing, type the NEW Preferred Name in the Change To field.		The Current Value and Change To values cannot be the same.  See example below.
6	Former Last Name	O	Document the Former Last Name provided by the Employee (should be listed in the Current Value field for Name-Last)		The Current Value and Change To values cannot be the same.  See example below.
7	Selected Items 2 Selected Items 3	N / A	<i>This step is <b>NOT</b> required because these two links contain no fields, at this time, that need to be verified or updated.</i>		
8	Add Button	R	Click Add	Message in the lower left corner "Add Complete; continue"	

**The action will be processed during the nightly batch program.**

## Individual Action (XP52.1) - Parameters Tab (NAME CHNG) - Example

The screenshot shows the HRIS State of Arizona interface for an Individual Action (XP52.1). The page title is "Individual Action (XP52.1)". The user is logged in as "welcome Frank" and the session ID is "xp52.1". The navigation bar includes buttons for Home, Add, Change, Delete, Previous, Inquire, Next, and Inquire. The main form displays the following information:

- Company: 1 (STATE OF ARIZONA)
- Employee: 50607 (O'CONNAL, BRIAN)
- Action, Nbr: NAME CHNG (NAME CHANGE)
- Effective: 07/01/2008
- Reasons: PER-NAME
- Last Chg Date: 06/17/2006
- Comments: [Empty field]

The Parameters tab is active, showing a table of data items to be updated:

Data Item	Current Value	Change To
Title		
Name - First	BRIAN	
Name - Middle		
Name - Last	O'CONNAL	O'CONNAR
Name Suffix		
Preferred Name	BRIAN	
Former Last Name		

The example above displays how a transaction would be input to change an employee's last name as the result of a legal name change.