



HRIS Job Role Training

Personal Information Change

Forms: XP52

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Introduction

HRIS requires that a personnel action be performed any time an employee requests a change to his/her personal information. A Personal Information change could be the result of an employee changing:

- His/her home and/or supplemental address and/or home phone number.
- Information as a result of a life event; for example, marriage, divorce, etc.
- Information to maintain accurate information in the Employee's record; for example, veteran status, and disability.

The Human Resources (HR) Initiator/Approver performs the Personnel 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.



Notes

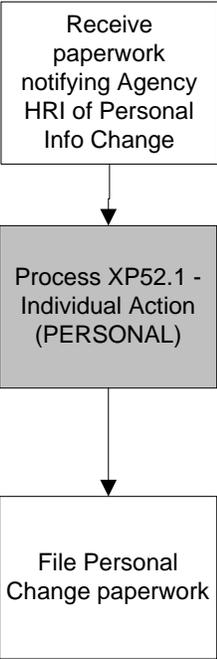
- When processing a personnel action, HRIS requires that a Reason Code be supplied for the action being performed. HRIS displays the results of all processed personnel actions on various management reports. Detailed information (if required) can be displayed by running the report based on selected Reason Codes.
 - **Example** – Jane Parker, a State of Arizona employee, marries and submits a name change request. The Agency processes the PERSONAL 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 history.

HRIS Personal Information Change Chart

Required forms appear as:



Optional forms appear as:



See Individual Action (XP52.1) - Parameters Tab (PERSONAL) (Page 6)

Individual Action (XP52.1) - Parameters Tab (PERSONAL)

The screenshot shows the HRIS interface for the State of Arizona. The title bar reads "Individual Action (XP52.1)". The top navigation bar includes buttons for "+ Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire". The main content area is divided into several sections:

- Header Information:** Company (1) is "STATE OF ARIZONA", Employee (3) is "O'CONNAL, BRIAN", and Action, Nbr (4) is "PERSONAL INFO UPDATE". The Effective date (5) is "07/01/2008". The "Reasons" field (6) contains "PER-NAME". The "Last Chg Date" is "06/17/2006".
- Navigation:** A search bar (1) contains "xp52.1".
- Parameters Tab:** The "Parameters" tab is active, showing a "Main" section with the following fields:
 - Immediate (8): A dropdown menu set to "N", with a value of "No".
 - Anticipated End (9): A date field.
 - Update Benefits (10): A dropdown menu set to "Y", with a value of "Yes".
 - Update Required Deductions (11): A dropdown menu set to "Y", with a value of "Yes".
 - Old Deduction End Date (12): A date field.
 - New Deduction Begin Date (13): A date field.
 - Occurrence Type (14): A dropdown menu.
 - Participant (15): A text field.
- Buttons:** A "Comments" button is located to the right of the "Reasons" field. A "Curr Calc" button is located at the bottom right of the parameters section.

The bottom of the screen shows a Windows taskbar with "Done" and "Local intranet" visible.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
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	Company 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	Employee 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	Action Nbr Field	R	Type or use the Drop Down to enter action ' PERSONAL '.	Based on the Action Nbr. selected the system will display the appropriate fields that are needed to complete this action.	
5	Effective Field	R	Type the Effective Date of the action.		Date is formatted as MMDDYYYY.
6	Reasons – 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.
	Reasons - Second Box Field	O	Type or use the Drop Down to enter the 2 nd Reason Code for the Pay Change.		The 2 nd 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	Inquire 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	Immediate 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.	ONLY New Hire and Rehire Actions are processed immediately. All other HRIS Actions are processed during the nightly batch.
9	Anticipated	R	Leave Blank	This field must be blank.	

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
	End Field				
10	Update Benefits 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	Update Required Deductions Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
12	Old Deduction End Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
13	New Deduction Begin Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	Occurrence Type Field	R	Leave Blank	This field must be blank.	Do not enter anything into this field.
15	Participant Field	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	Selected Items 1	R	Click on the Selected Items 1 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.

Individual Action (XP52.1) - Selected Items 1 Tab (PERSONAL)

HRIS State of Arizona

Individual Action (XP52.1)

welcome Frank [logout] xp52.1

Home >> + Add Change - Delete < Previous ? Inquire > Next | Inquire

Company 1 STATE OF ARIZONA Last Chg Date 06/17/2006

Employee 12345 O'CONNAL, BRIAN

Action, Nbr PERSONAL PERSONAL INFO UPDATE

Effective 07/01/2008

Reasons PER-NAME

Comments

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Data Item	Current Value	Change To
Name - Last	O'CONNAL	
Name - First	BRIAN	
Name - Middle		
Preferred Name	BRIAN	
Former Last Name		
Marital Status	M	
Address Line 1	12122 INDIAN TRAIL	
Address Line 2		
City	PRESCOTT	
State or Prov	AZ	
County	YAVAPAI	
Postal Code	86305	

Done Local intranet

	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	Name-Last Field Name-First Field Name-Middle Field Preferred Name Field Former Last Name Field	O O 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.
3	Marital Status Field	O	Verify the current Marital Status. If this has changed, type in the new value in the Change To field.		State of Arizona values are: <ul style="list-style-type: none"> ▪ 'M' – Married ▪ 'S' – Single ▪ 'D' – Divorced ▪ 'W' – Widowed ▪ 'L' – Legally Separated ▪ 'O' – Significant Other ▪ 'P' – Domestic Partner ▪ 'C' – Common Law
4	Address Line 1 Field Address Line 2 Field City Field State or Prov Field County Field Postal Code Field	O O O 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.		Information must be in ALL CAPS. Do not include Punctuation. County name must be spelled out, example 'MARICOPA'. AZ is the correct abbreviation for the State of Arizona
5	Selected Items 2 link button	R	Click on Selected Items 2 to see additional fields that may need to be changed.		

Individual Action (XP52.1) - Selected Items 2 Tab (PERSONAL)

The screenshot displays the HRIS State of Arizona Individual Action (XP52.1) interface. The top navigation bar includes a Home button and a menu with options: Add, Change, Delete, Previous, Inquire, Next, and Inquire. The main header shows the HRIS logo and the text "Individual Action (XP52.1)".

Key information displayed includes:

- Company: 1 (STATE OF ARIZONA)
- Employee: 12345 (O'CONNAL, BRIAN)
- Action, Nbr: PERSONAL (PERSONAL INFO UPDATE)
- Effective: 07/01/2008
- Reasons: PER-NAME
- Last Chg Date: 06/17/2006

The interface features a tabbed menu with "Parameters", "Selected Items 1", "Selected Items 2", and "Selected Items 3". The "Selected Items 2" tab is active, showing a table of data items with their current values and change-to fields. Callouts 1 through 10 point to various elements: 1 points to the Company field, 2 to Birthdate, 3 to Gender, 4 to Veteran, 5 to Disability, 6 to Supplemental City, 7 to Badge Number, 8 to Medicare Indicator, 9 to STIP-LANG, and 10 to the Reasons field.

Data Item	Current Value	Change To
Birthdate	01/29/1974	<input type="text"/>
Gender	F	<input type="text"/>
Veteran	N	<input type="text"/>
Disability	N	<input type="text"/>
Supplemental Addr 1	12122 INDIAN TRAIL	<input type="text"/>
Supplemental Addr 2		<input type="text"/>
Supplemental City	PRESCOTT	<input type="text"/>
Supp State or Prov	AZ	<input type="text"/>
Supplemental Postal	86305	<input type="text"/>
Badge Number		<input type="text"/>
Medicare Indicator		<input type="text"/>
STIP-LANG		<input type="text"/>

	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	Birthdate Field	O	Verify the information that is populated from the Employee's current record. If applicable, type in the Employee's NEW value in the Change To field.		Birthdate will be formatted: MM/DD/YYYY
3	Gender Field	O	Verify the information that is populated from the Employee's current record. If applicable, key or use the drop down to enter the Employee's NEW value in the Change To field.		Valid values are M = Male, F = Female
4	Veteran Field	O	Verify the information that is populated from the Employee's current record. If applicable, key or use the drop down to enter the Employee's NEW value in the Change To field.		If you indicate the Employee was born in 1980 and put the Employee is a Vietnam Era Veteran that would be inaccurate data.
5	Disability Field	O	Verify the information that is populated from the Employee's current record. If applicable, key or use the drop down to indicate if the Employee has a NEW value in the Change To field.		Valid values are N = No, Y = Yes.
6	Supplemental Addr 1 Field Supplemental Addr 2 Field Supplemental City Field Supp State or Prov Field Supplemental Postal Field	O O O O O	These fields will default in from the Home Address. Type in the Employee's Supplemental Address (if applicable – see notes). For any field that is changing, type the NEW value in the Change To field.		If the Employee lives in a state other than Arizona, you must place a valid Arizona address in the supplemental address fields *Failure to use a valid Arizona address will result in pay and tax errors.
7	Badge Number Field	O	If applicable to your agency, verify the information that is populated for	.	

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
			the Employee's Badge Number. If applicable, type in the NEW value in the Change To field.		
8	Medicare Indicator Field	O	Verify the information that is populated from the Employee's current record. If applicable, key or use the drop down to enter the NEW value in the Change To field.		Valid Values are: <ul style="list-style-type: none"> ▪ 'A' – Medicare Part A ▪ 'B' – Medicare Part B ▪ 'C' – Medicare Part A & B ▪ 'D' – Medicare Part Unknown ▪ 'E' – No Medicare
9	STIP-LANG Field	O	If applicable for your agency, verify the information that is populated from the Employee's current record. If information needs to be updated, key in the NEW value in the Change To field.		
10	Selected Items 3 link	R	Click on Selected Items 3 to see additional fields that may need to be changed.		

	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	EDUCATION Field	O	If applicable for your agency, verify the information that is populated from the Employee's current record. If information needs to be updated, key in the Employee's NEW value in the Change To field.		
3	Badge Code Field	O	If applicable for your agency, verify the information that is populated from the Employee's current record. If information needs to be updated, key in the NEW value in the Change To field.		
4	Telephone – Home Field	O	Verify the information that is populated from the Employee's current record. If information needs to be updated, key in the NEW value in the Change To field.	.	Format for Phone is XXX.XXX.XXXX (ex. 123.456.7890). The phone number must contain periods, not dashes.
5	Supp Phone Number field	O	Verify the information that is populated from the Employee's current record. If information needs to be updated, key in the NEW value in the Change To field.	.	Format for Phone is XXX.XXX.XXXX (ex. 123.456.7890). The phone number must contain periods, not dashes.
6	Add button	R	Click Add	Message in the lower left corner "Add Complete; continue"	

The action will be processed during the nightly batch program.