



# HRIS Job Role Training

**Status Change**

Forms: XP52

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## Introduction

Employee Status Codes play an important role in the HRIS system. They indicate:

- Employment status (permanent, original probation, mobility, etc.)
- Benefits eligibility (benefits or no benefits)
- Pay Status (pay or no pay)
- Part-time or Full-time
- Included in headcounts for budgeting purposes.

The Employee Status Code affects multiple items including benefits, time accrual, payroll and Employee Groups. If the employee is placed in an incorrect status, he/she may not receive the appropriate benefits and/or time accruals.

Refer to the Job Aids of “What are Employee Status Codes?” and “Employees and Status Codes” for additional information.

A STATUS CHANGE should be processed when the employee has a change in one of the above-listed items. The Human Resources (HR) Initiator/Approver will process using the Individual Action form (XP52.1). The action will be processed during the nightly batch program.

### Notes

- A time record created in HRIS is like a snapshot of the Employee’s information at that moment in time. If information is changed (could be the result of a personnel action – Status Change) and is reflected on the *Employee Master Record (HR11.1)* after the creation of the Employee’s time record for that pay period, personnel action changes will not get picked up on the existing time record. The time record will have to be deleted and re-added by your Agency Payroll Office prior to the next payroll compute to reflect the change.

**Example** – An Agency Timekeeper enters employee time records on Thursday. A specific employee within that batch of time records is moved into a Leave Without Pay status. The new status began on the first day of the current pay period but was not entered into the system until after the time record had been entered. The Leave Without Pay status change will not be reflected on the time records entered by the Agency Timekeeper. The time records must be deleted and re-added to reflect the new status. If not, a payroll check will be issued.

### Warning

- **Do not** use the STATUS CHG Action to place an employee in a Separated Status, or to move an employee from a Separated Status to an Active Status. To place an Employee in a Separated Status use the Separation Action (See Separation Training). To place a Separated Employee in an Active Status use the Rehire Action (See Rehire Training). If a Separation Action was keyed in error or has been rescinded, please contact the HRISHelpdesk to complete a History Correction.

# HRIS Status Change Chart

Required forms appear as:



Optional forms appear as:



Receive paperwork notifying Agency HRI of Status Change



Process XP52.1 - Individual Action Form STATUS CHG

See Individual Action (XP52.1) - Parameters Tab (STATUS CHG) (Page 4)

# Individual Action (XP52.1) - Parameters Tab (STATUS CHG)

The screenshot shows a web browser window titled "Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer". The address bar shows the URL "http://h5-lsf9.azdoa.gov/lawson/portal/". The page header includes the HRIS State of Arizona logo and the title "Individual Action (XP52.1)". A navigation bar contains buttons for "Add", "Change", "Delete", "Previous", "Inquire", and "Next". A search bar on the right contains "xp52.1".

The main content area displays the following information:

- Company:** STATE OF ARIZONA
- Employee:** 92337 OLSSON, SHANDRA K.
- Action, Nbr:** STATUS CHG STATUS CHANGE
- Effective:** 11/01/2008
- Reasons:** ST-STAT
- Last Change:** 06/14/2008

Below this information are tabs for "Parameters", "Selected Items 1", "Selected Items 2", and "Selected Items 3". The "Parameters" tab is active and shows the following options:

- Immediate:** N
- Anticipated End Date:** [Date field]
- Update Benefits:** [Dropdown menu]
- Update Absence Management:** [Dropdown menu]
- Update Required Deductions:** [Dropdown menu]
- Old Deduction End Date:** [Date field]
- New Deduction Begin Date:** [Date field]
- Currency Calculation:** [Button]

The bottom of the screen shows a taskbar with the start button and several open applications, including "Novell-delivered...", "2 Novell Group...", "Lawson portal - ...", "HR Initiator", and "Status Change T...". The system clock shows "2:38 PM".

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual Action (XP52.1)

Welcome Patricia [logout]

xp52.1

### HRIS State of Arizona Individual Action (XP52.1)

Home >> Add Change Delete Previous Inquire Next | Inquire

Company: 1 STATE OF ARIZONA Last Change: 06/14/2008

Employee: 92337 OLSSON, SHANDRA K.

Action, Nbr: STATUS CHG STATUS CHANGE

Effective: 11/01/2008

Reasons: ST-STAT

Comments

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Main Special Processing U.S. - COBRA

Immediate: N

Anticipated End Date: [ ]

Update Benefits: Y

Update Absence Management: [ ]

Update Required Deductions: Y

Old Deduction End Date: [ ]

New Deduction Begin Date: [ ]

Currency Calculation

8

9

10

11

12

13

14

Internet 100%

start Novell-delivered ... 2 Novell Group... Lawson portal - ... HR Initiator Status Change T... 2:45 PM

R=Required, O=Optional

	<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 bring up 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>STATUS CHG</b> '.	Based on the Action Nbr selected, the system will populate the appropriate fields 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 Status Change Action.		The first reason code is required. The reason codes are smart coded. *Refer back to the HRIS Basics lesson 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 Status Change.		The 2 <sup>nd</sup> Reason Code is not required but is recommended to better define the reason for the Status Change 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 fields with data from the Employee's record.	<b>DO NOT CLICK Add at this point!</b>
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 batch 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 Date</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 Absence Management</b> Field	R	Leave Blank	This field must be blank.	

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	 <b>Notes/ Additional Information</b>
12	<b>Update Required Deductions Field</b>	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	<b>Old Deduction End Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	<b>New Deduction Begin Date Field</b>	R	Leave Blank	When the action is processed the system will default in the correct date.	

# Individual Action (XP52.1) - Selected Items 1 Tab (STATUS CHG)

Lawson portal - Individual Action (XP52.1) - Windows Internet Explorer

http://h5-lsf9.azdoa.gov/lawson/portal/

File Edit View Favorites Tools Help

Lawson portal - Individual Action (XP52.1)

Welcome Patricia [logout]

xp52.1

**HRIS State of Arizona**

**Individual Action (XP52.1)**

Home >> Add Change Delete Previous Inquire Next | Inquire

Company: 1 STATE OF ARIZONA  
 Employee: 92337 OLSSON, SHANDRA K.  
 Action, Nbr: STATUS CHG STATUS CHANGE  
 Effective: 11/01/2008  
 Reasons: ST-STAT  
 Last Change: 06/14/2008

Parameters Selected Items 1 Selected Items 2 Selected Items 3

Data Item	Current Value	Change To
Status	T2	
FTE	1.000000	
ANNUAL LEAVE PLAN	UNCOVERED	
SICK LEAVE PLAN	STANDARD	
RETIREMENT CODE	1	
STATUS TERM DATE		
Work Schedule	8 HR M-FR	

Inquiry Complete, add new values

start Novell-delivered ... 2 Novell Group ... Lawson portal - ... HR Initiator Status Change T... 2:37 PM

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	 <b>Notes/ Additional Information</b>
1	<b>Selected Items 1</b>	R	Click on the <b>Selected Items 1</b> tab.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information that was imported from Employee's record will appear in the Current Value Field.
2	<b>Company field</b> <b>Employee Field</b> <b>Action, Nbr Field</b> <b>Effective Date Field</b> <b>Reasons Fields</b>	R R R R R	No Action Required, these fields will default from the Parameters Tab.		
3	<b>Status Field</b>	R	Type in the NEW Status for the employee.		The Employee Status Code has a direct affect on their benefit eligibility and time accrual plans. If the employee is placed in an incorrect status, he/she will not receive the appropriate benefits and/or time accruals.
4	<b>FTE Field</b>	R	Review current FTE for Employee.  If applicable, type in the NEW FTE for the employee.		Full time =1.0, ¾ time = .75, ½ time = .50, and ¼ time = .25
5	<b>ANNUAL LEAVE PLAN Field</b>	R	Review current Annual Leave Plan.  If applicable, type in the NEW Annual Leave Plan for the Employee.		The employee should be placed in an Annual Leave plan appropriate for their status and FTE.  Example: If the Employee is a covered ½ time employee they must be in the Covered ½ time Annual Leave Plan.
6	<b>SICK LEAVE PLAN Field</b>	R	Review current Sick Leave Plan.  If applicable, type in the NEW Sick Leave Plan for the Employee.		The employee should be place in a Sick Leave plan appropriate for their status and FTE.  Example: If the Employee is a covered ½ time employee they must be in the Covered ½ time Sick Leave Plan.
7	<b>RETIREMENT CODE Field</b>	R	Review current Retirement Code.  If applicable, type in the NEW Retirement Code for the Employee.		
8	<b>STATUS TERM DATE Field</b>	R	Review current Status Term Date.  If applicable, type in the NEW Status Term Date for the Employee.		Date is formatted as MMDDYYYY.  Example - If the Employee is being promoted and will be put in promotional probation status, there must be a Status Term Date.

	<b>HRIS Field</b>	<b>R / O</b>	<b>Step/Action</b>	<b>Expected Results</b>	 <b>Notes/ Additional Information</b>
9	<b>Work Schedule</b> Field	R	Review current Work Schedule.  If applicable, type in the NEW Work Schedule for the Employee.		Note: The Work Schedule entered in this field directly affects the Employee's time entry.
10	<b>Selected Items 2 and 3</b>	O	Not applicable		Selected Items 2 and 3 contain no fields; therefore you do not need to click on these links for this action.
11	<b>Add</b> button	R	Click Add	Message in lower left corner "Add-Complete; continue".	