



HRIS Job Role Training

Work Contacts

Forms: XP52

Table of Contents

Introduction	3
Individual Action (XP52.1) – Parameters Tab (WK CONTACT).....	4
Individual Action (XP52.1) - Selected Items 1 Tab (WK CONTACT).....	7

Introduction

There are several types of personnel actions that may occur in HRIS. The Work Contacts Change – would ordinarily be completed when an employee moves work locations. The Human Resources (HR) Initiator/Approver would process an Employee Work Contacts change using the *Individual Action form (XP52.1)* to update the following fields:

- Mail Box Number
- Mail Group
- Telephone – Work
- Telephone – Work Ext
- E-mail Address

E-mail Address should be updated using the *Email and Phone Maintenance Form (ZH12.1)*. This form also allows for the update of Telephone – Work and Telephone – Work Ext, and for publishing the Employee’s 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.
- Keeping employee information updated in HRIS is extremely important; this information will impact the HR, Benefits and Payroll areas, and HRIS is the system of record.
- Failure to properly enter the appropriate data will corrupt the Employee’s HRIS history.

Individual Action (XP52.1) – Parameters Tab (WK CONTACT)

The screenshot displays the HRIS interface for the 'Individual Action (XP52.1)' Parameters Tab. The top navigation bar includes 'Add', 'Change', 'Delete', 'Previous', 'Inquire', and 'Next' buttons. The 'Inquire' button is highlighted with callout 7. The top right shows 'Welcome Connie' and a 'logout' link. A search bar contains 'xp52.1' with callout 1. Below the navigation bar are input fields for 'Company' (callout 2), 'Employee' (callout 3), 'Action, Nbr' (callout 4), and 'Effective' (callout 5). A 'Last Change' label is positioned to the right. Below these fields are 'Reasons' and 'Comments' fields, with callout 6 pointing to the 'Reasons' field. The main content area is divided into tabs: 'Parameters', 'Selected Items 1', 'Selected Items 2', and 'Selected Items 3'. Under 'Parameters', there are sub-tabs for 'Main', 'Special Processing', and 'U.S. - COBRA'. The 'Main' sub-tab is active, showing a list of parameters: 'Immediate' (callout 8, dropdown 'N'), 'Anticipated End Date' (callout 9, date field), 'Update Benefits' (callout 10, dropdown), 'Update Absence Management' (callout 11, dropdown), 'Update Required Deductions' (callout 12, dropdown 'y'), 'Old Deduction End Date' (callout 13, date field), and 'New Deduction Begin Date' (callout 14, date field). A 'Currency Calculation' button is located at the bottom right of the parameter list. Callout 15 points to the 'U.S. - COBRA' sub-tab. The bottom status bar shows 'Done', 'Internet', and '100%' zoom.

	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 ' WK CONTACT '.	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 End Date Field	R	Leave Blank	This field must be blank.	
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.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
11	Update Absence Management Field	O	Leave Blank	When the action is processed the system will default.	
12	Update Required Deductions Field	O	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	Old Deduction End Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	New Deduction Begin Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
15	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.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	Company field Employee Field Action, Nbr Field Effective Date Field Reasons Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
2	Telephone-Work Field Telephone – Work Ext Field Email Address Field	N / A	DO NOT UPDATE THE Email Address Field USING THIS ACTION. Information should be updated using the Email and Work Phone Maintenance Form (ZH12.1).		
3	Mail Box Number Field	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.		
4	Mail Group Field	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.		
5	Selected Items 2 Selected Items 3	N / A	<i>This step is NOT required because these two links contain no fields, at this time, that need to be verified or updated.</i>		
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.