

# HRIS – Human Resources Information Solution

# RESOURCE GUIDE: AGENCY HR GENERALIST - GENERAL EMPLOYEE INFORMATION MAINTENANCE

# AGENCY HR GENERALIST - GENERAL EMPLOYEE INFORMATION MAINTENANCE

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#### Introduction

General information about employees is stored and maintained in HRIS and can be used for reporting and tracking. General information can added/maintained in an employee's record at any time, but HRIS recommends certain forms to be entered for all new hires.

General Employee information includes but is not limited to:

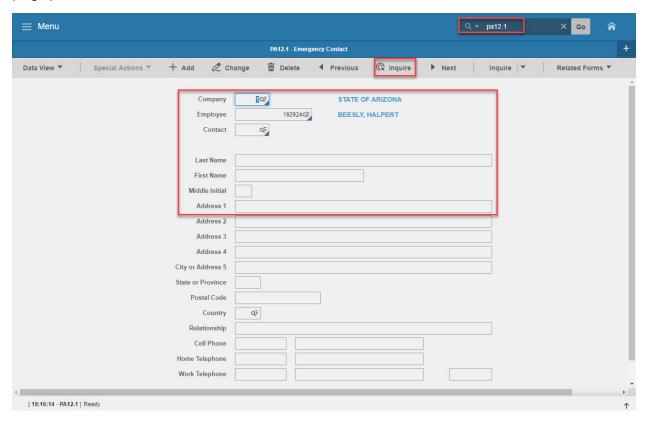
- Emergency Contact Information tracked on the Emergency Contact Form (PA12.1)
- Additional Contact Numbers tracked on the Additional Contact Number Form (HR20.1)
- Military Service tracked on the Military Service Form (PA14.1)
- Company Property tracked on the Company Property Form (PA16.1)
- Education tracked on the Education Form (PA20.1)
- Competencies tracked on the Competencies Form (PA21.1)

It is not required to fill out every form or even every field on each form. You can record as much or as little general Employee information as determined by your agency standards.

For State of Arizona new hires, HRIS recommends completing Emergency Contact Information and Additional Contact Numbers.

# Emergency Contact Form (PA12.1)

(Image 1)



# Steps 1-9 of 21

(Image 1, Table 1)

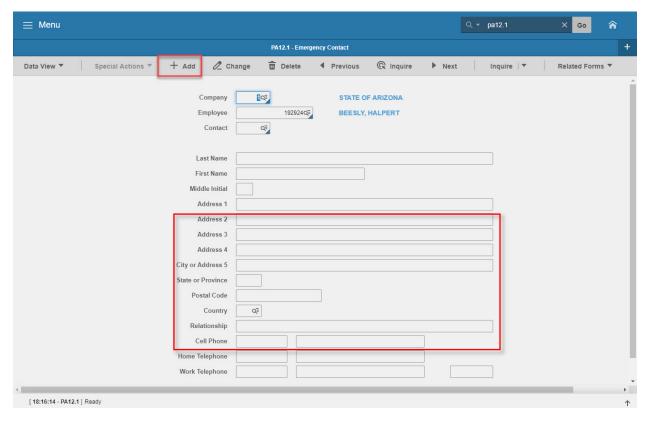
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PA12.1</b> in the Search Box. Press Enter on the keyboard	The Emergency Contact Form (PA12.1) will open.	The Emergency Contact Form (PA12.1) can be used to track all emergency contact information for an employee.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the Employee's EIN.	System will display the Employees name at the end of the field after	You must enter the correct EIN.

		Poquirod			
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
		(0)		advancing	
				out of the field.	
4	Inquire Button	R	Click Inquire	HRIS will access needed information for the EIN  If Employee has no Emergency Contacts, message "No emergency employee contacts exists" will appear in the lower left corner.  If Employee has Contacts, the first contact will appear on the form and the message "Inquiry Complete" will	Notes If Deleting an Emergency Contact, type or select the Contact Field, then after Inquiring, skip to step Error! Reference source not found. (Page Error! Bookmark not defined.)
				appear in the lower left corner.	
5	Contact Field	0	Leave field Blank – HRIS will assign this number.	Comer.	When the field is left Blank, HRIS assigns a unique sequence number to each Emergency Contact Defined, starting with '1'.
					You should enter the contacts in order of importance into HRIS. An Employee can have multiple Emergency Contacts at the same time.
6	<b>Last Name</b> Field	R	Type the Last Name of the Emergency Contact		Information must be entered in ALL CAPS.
7	First Name Field	R	Type the First Name of the Emergency Contact		Information must be entered in ALL CAPS.
8	Middle Initial	0	Type the Middle		Information must be

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Field		Initial of the Emergency Contact		entered in ALL CAPS.
9	Address 1 Field	0	Type the Street Address of the Emergency Contact		Information must be entered in ALL CAPS.

# **Emergency Contact Form (PA12.1)**

(Image 1)



### Steps 10-18 of 21

(Image 1, Table 2

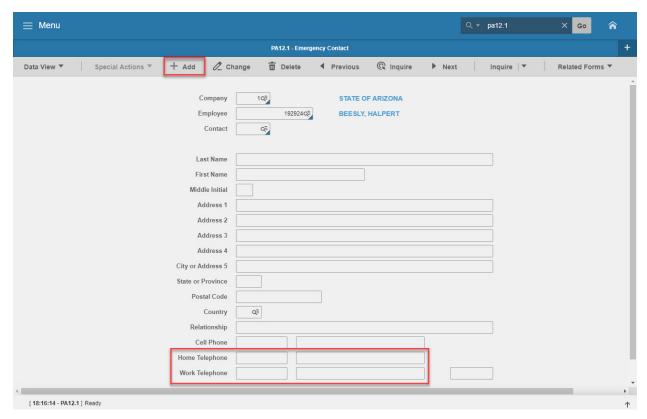
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	Address 2 Field	0	Enter additional Address information if needed (ex. Apt or Space Number)		Information must be entered in ALL CAPS.
11	Address 3 Field	0	Type additional		Information must be



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			Address information if needed		entered in ALL CAPS.
12	Address 4 Field	0	Type additional Address information if needed		Information must be entered in ALL CAPS.
13	City or Address 5 Field	0	Type the City of the Emergency Contact		Information must be entered in ALL CAPS.
14	State or Province Field	0	Type the State of the Emergency Contact		Information must be entered in ALL CAPS.
15	Postal Code Field	0	Type the Postal Code of the Emergency Contact		Information must be entered in ALL CAPS.
16	Country Field	0	Type the Country of the Emergency Contact		Information must be entered in ALL CAPS.
17	<b>Relationship</b> Field	O	Type the relationship of the Emergency Contact to the Employee.		Information must be entered in ALL CAPS.  This is a free form field that should be used as the short description for the relation to the Employee (i.e., Mother, Father, etc).
18	Cell Phone Field First Box	O	Type the Country Code of the Emergency Contact. Country Code is only required if the person lives outside of the United States.		If the Emergency Contact lives in another country, then type the Country Code in this field.
	Second Box	0	Type the Emergency Contact's cell number.		Format: 999.99.9999

# Emergency Contact Form (PA12.1)

(Image 1)



#### Steps 19-21 of 21

(Image 1, Table 2

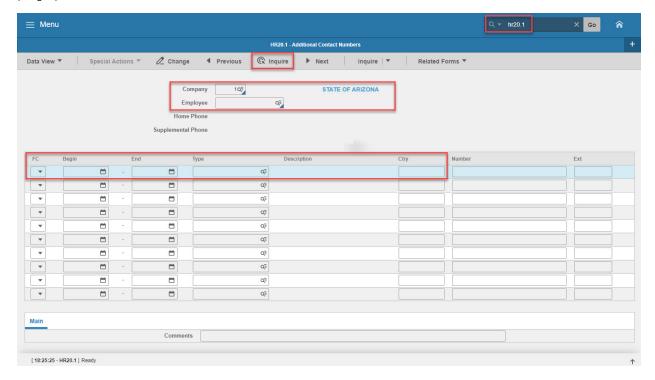
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
19	Home Telephone Field First Box	0	Type the Country Code of the Emergency Contact. Country Code is only required if the person lives outside of the United States		If the Emergency Contact lives in another country, then type the Country Code in this field.
	Second Box	0	Type the Emergency Contact's home phone number.		Format: 999.99.9999
21	Work Telephone Field First Box	0	Type the Country Code of the Emergency		If the Emergency Contact lives in another country, then type the Country



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			Contact. Country Code is only required if the person lives outside of the United States		Code in this field.
	Second Box	0	Type the Emergency Contact's work phone number.		Format: 999.99.9999
	Third Box	0	Type the Extension of the Emergency Contact		Format: 9999
21	Add/Change buttons	R	Click Add if adding a new contact.  Click Change if updating/deleting an existing contact.	There will be a message in the lower left corner "Add Complete – Continue" if Add was clicked.  There will be a message in the lower left corner "Change Complete – Continue" if Change was	Action has been processed. The system automatically assigns contact a number in sequence.  To assign additional contacts, remove the number from the Contact field, and follow steps as outlined in this Task Step Chart.

# Additional Contact Number Form (HR20.1)

(Image 2)



### Steps 1-9 of 12

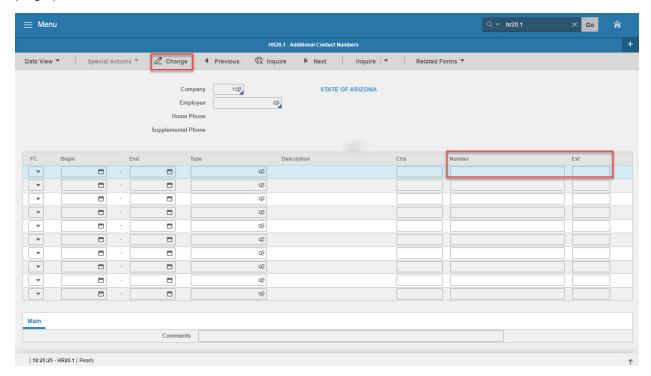
(Image 2, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>HR20.1</b> in the Search Box. Press Enter on the keyboard	The Additional Contacts Form (HR20.1) will open.	The Additional Contacts Form (HR20.1) can be used to track additional contact information for an Employee, including Home Phone, Cell Phone, Pager, etc.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the Employee's EIN.	System will display the Employees name at the end of the field after advancing out of the field.	You must enter the correct EIN.

		Required			
No.	HRIS Field	(R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
4	Inquire Button	R	Click Inquire	HRIS will access needed information for the EIN	
5	<b>FC</b> Field	R	Type 'A' in the <b>FC</b>	If Employee has Contacts, they will appear on the form and the message "Inquiry Complete" will appear in the lower left corner.	Notes
3	remed	K	field to add a new additional contact.  Type 'C' in the FC field to change an existing additional contact.  Type 'D' in the FC		If 'D' is selected and no additional changes are required, skip to step 12 (Page 10)
			field to delete an existing additional contact.		
6	<b>Begin</b> Field	0	Type the begin date for the additional contact if you have it.		Format: MMDDYY.  The effective dates you assign here can assist in the maintenance of temporary numbers for the Employee.
7	End Field	0	Type the end date for the additional contact if you have it.		Format: MMDDYY.
8	Type Field	0	Type or Select from the drop down the type of contact.		Example Cell PH, Pager, MSG Service
9	Ctry Field	0	Leave this field BLANK.		The only exception would be if the Employee gave you a contact number in another country. Then you would use this field to enter the country code.

# Additional Contact Number Form (HR20.1)

(Image 2)



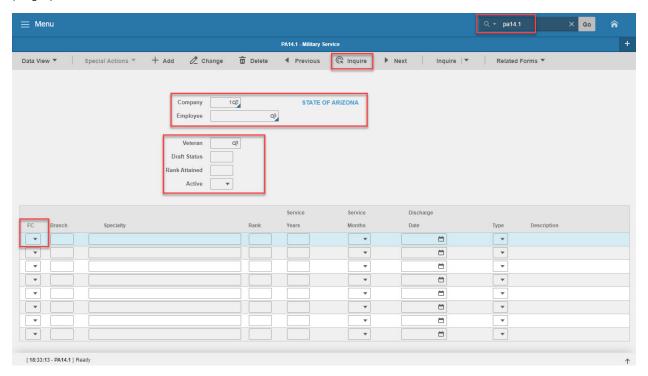
#### Steps 10-12 of 12

(Image 2, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	<b>Number</b> Field	0	Type the Contact number or email address in this field whichever is applicable.		Number Format: 999.999.9999,  Email Format: ALL CAPS – Example: JOHNDOE@AZ.GOV
11	Ext Field	0	Type the Contact Extension if applicable.		
12	Change Button	R	Click Change to Add, Change or Delete an additional contact.	There will be a message in the lower left corner "Change Complete - Continue".	Action is processed and saved.

# Military Service Form (PA14.1)

(Image 3)



#### Steps 1-9 of 17

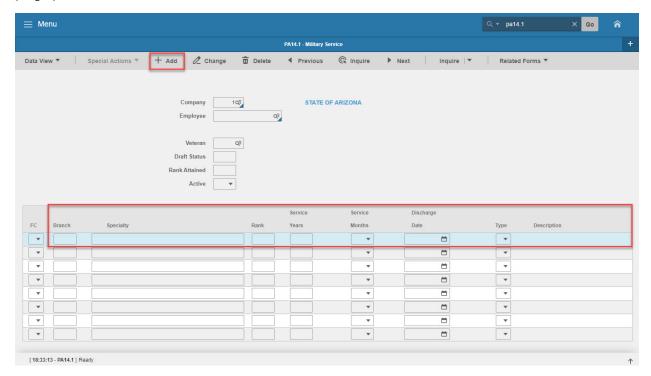
(Image 3, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PA14.1</b> in the Search Box. Press Enter on the keyboard	The Military Service Form (PA14.1) will open.	The Military Service Form can be used to track employee military status, including current or prior service.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the Employee's EIN.	System will display the Employees name at the end of the field after advancing out of the field.	You must enter the correct EIN.
4	Inquire Button	R	Click Inquire	HRIS will access needed information for	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
				the EIN  Message "Inquiry Complete" will appear in the lower left corner.	
5	Veteran Field	0	Type or Select from the drop down menu the Veteran Status of the Employee		Valid Values are: N – No Y – Veteran D – Veteran With Disabled
6	<b>Draft Status</b> Field	0	Leave this field BLANK.		Field is not used by the State of Arizona.
7	Rank Attained Field	0	Type the highest rank attained by the Employee, if available.		
8	<b>Active</b> Field	0	Type or Select from the drop down if the Employee is still Active in the National Guard or Reserves, if available.		Valid Values are: NG – National Guard RE – Reserves
9	FC Field	R	Type 'A' in the FC field to add a new military service.  Type 'C' in the FC field to change an existing military service.  Type "D" in he FC field to delete an existing military service.		Notes If 'D' is selected and no other changes are required, skip to step 17.

# Military Service Form (PA14.1)

(Image 3)



#### Steps 10-17 of 17

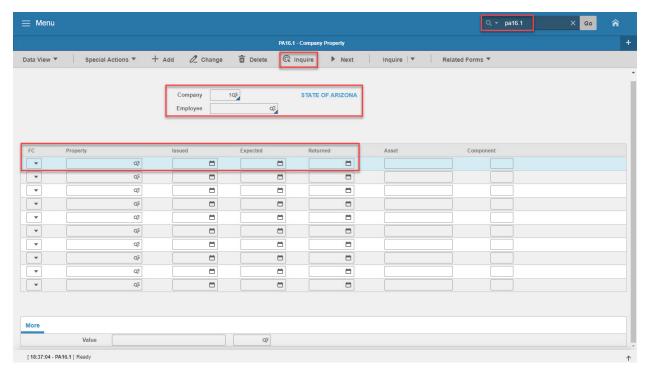
(Image 3, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	<b>Branch</b> Field	0	Type the Branch of Service the Employee is/was in, if available.		Example – AF for Air Force, MA for Marines.
11	<b>Specialty</b> Field	0	Type the Employee's service specialty, if available.		Example – Tank Driver, Linguist
12	Rank Field	0	Type the Employee's current rank, if available.		Example – Master Sergeant, Lieutenant.
13	Service Years Field	0	Type the number of years the Employee served, if available.		
14	Service Months Field	0	Type the number of months the Employee served, if		Valid Values are 01 – 11.  Example – If Employee

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			available.		served 4 years, 5 month; you would enter the following: Serv Yrs Field = 4, Mths Field 5.
15	<b>Discharge Date</b> Field	0	Type or Select from the drop down the date of the Employee's discharge, if available.		
16	Type Field	0	Type or Select the type of discharge for the Employee, if available.		Valid Values are: D = Dishonorable H = Honorable L = Less Honorable M = Medical O = Other
17	Add/Change Buttons	R	Click 'Add' to Add a new record, or if this is the first record being added.  Click 'Change' if updating a recording, or adding a record to information that previously existed.  Click 'Change' if deleting a record that existed.	If Add was clicked, there will be a message in the lower left corner "Add Complete – Continue".  If Change was clicked there will be a message in the lower left corner "Change Complete – Continue".	Action is processed and saved.

# Company Property Form (PA16.1)

(Image 4)



### Steps 1-9 of 14

(Image 4, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PA16.1</b> in the Search Box. Press Enter on the keyboard	The Company Property Form (PA16.1) will open.	The Company Property Form can be used to track any type of company property issued to an employee.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the employee's EIN.	System will display the employees name at the end of the field after advancing out of the field.	You must enter the correct EIN.
4	Inquire Button	R	Click Inquire	HRIS will access needed information for the EIN	

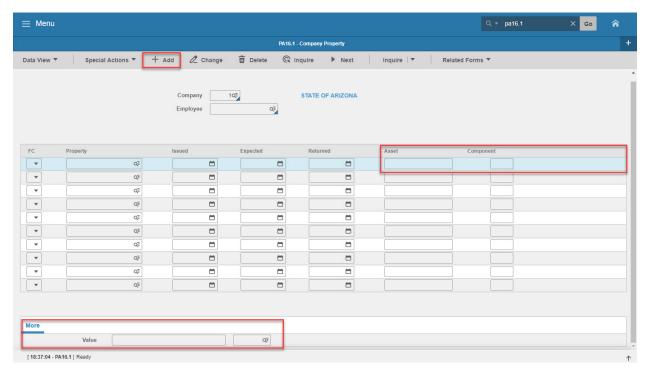


No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
				Message "No More Records to View" will appear in the lower left corner.	
				If employee has company property, they information will appear on the form and the message "Inquiry Complete" will appear in the lower left corner.	
5	FC field	R	Type 'A' in the FC field to add a new company property.  Type 'C' in the FC field to change an existing company property.  Type 'D' in the FC field to delete an		Notes If 'D' is selected and no other changes are required, skip to step 13
6	Property Field	R	existing company property.  Type or Select from the drop down menu the company property that will be issued to the employee.		
7	Issued Field	R	Type the date of issue of the company property		Format: MMDDYY
8	Expected Field	0	Type the expected date of return of the company property, if available.		Format: MMDDYY
9	Returned Field	0	Type the date the company property was returned.		Format: MMDDYY  This field will not be completed until the

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					property has been returned.

# Company Property Form (PA16.1)

(Image 4)



#### Steps 10-14 of 14

(Image 4, Table 2)

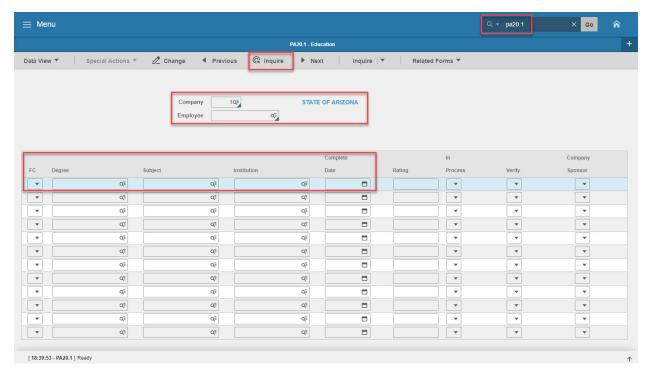
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	Asset Field	O	Type the asset number of the company property being issued, if available.		Field allows for 9 characters.  Example: 123456789
11	<b>Component</b> Field	0	Type the component number of the company property being issued, if available.		Field allows for 3 characters.  Example 111
12	Value Field –	0	Type the dollar		Field allows for 13



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	First Box		value of the company property, if available.		characters.
13	Value Field – Second Box	0	Type or Select the currency that the value is being placed in.		For State of Arizona, should select 'USD' for United States Dollar.  You may repeat these steps as many times as necessary.
14	Add/Change Buttons	R	Click 'Add' to Add a new record, or if this is the first record being added.  Click 'Change' if updating a recording, or adding a record to information that previously existed.  Click 'Change' if deleting a record that existed.	If Add was clicked, there will be a message in the lower left corner "Add Complete – Continue".  If Change was clicked there will be a message in the lower left corner "Change Complete – Continue".	Action is processed and saved.

### Education Form (PA20.1)

(Image 5)



#### Steps 1-9 of 14

(Image 5, Table 1)

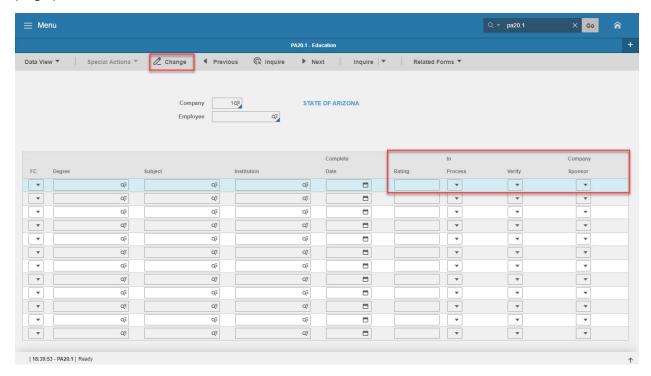
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PA20.1</b> in the Search Box. Press Enter on the keyboard	The Education Form (PA20.1) will open.	The Education Form (PA20.1) provides the ability to track an Employee's education such as: High School, Associates, and/or Bachelors Degree, etc.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the employee's EIN.	System will display the employees name at the end of the field after advancing out of the field.	You must enter the correct EIN.
4	Inquire Button	R	Click Inquire	HRIS will access needed	



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
				information for the EIN  Message "Inquiry Complete" will appear in the lower left corner.	
5	FC field	R	Type 'A' in the FC field to add a new Education.  Type 'C' in the FC field to change an existing Education  Type 'D' in the FC field to delete an existing Education.		Notes If 'D' is selected and no other changes are required, skip to step 14
6	<b>Degree</b> Field	R	Type or Select from the drop down the degree obtained by the Employee.		
7	Subject Field	0	Type or Select the subject of the degree.		
8	Institution Field	0	Leave this field BLANK.		At this time, field is not populated and therefore will not be used.
9	Complete Date Field	0	Type or Select the completion date of the degree		Format: MMDDYY

### Education Form (PA20.1)

(Image 5)



#### Steps 10-14 of 14

(Image 5, Table 2)

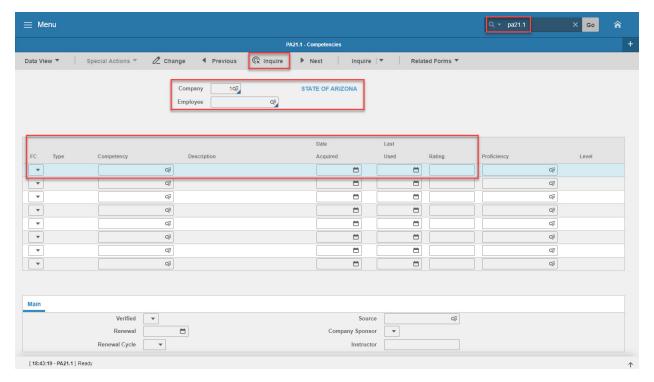
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	<b>Rating</b> Field	0	Type the grade point average or any other level that represents the employee's educational performance.		Example: 4.0
11	In Process Field	0	Type or Select from the drop down menu the value that indicates whether the employee is in the process of obtaining the education, if applicable.		Valid values are:  N = No Y = Yes  *The default value is N
12	Verified Field	0	Type or Select from the drop down menu whether the change to this		Valid values are: N = No Y = Yes



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			educational record has been verified, if applicable.		*The default value is Y
13	Company Sponsor Field	0	Type or Select from the drop down menu whether or not the education was state sponsored, if applicable.		Valid values are: N = No Y = Yes *The default value is N
14	Change Button	R	Click 'Change' if updating a recording, or adding a record to information that previously existed.  Click 'Change' if deleting a record that existed.	Change was clicked there will be a message in the lower left corner "Change Complete - Continue".	Action is processed and saved.

# Competencies Form (PA21.1)

(Image 6)



#### Steps 1-9 of 17

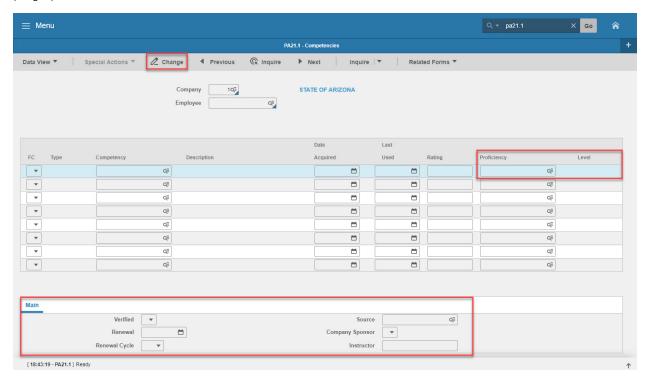
(Image 6, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type <b>PA21.1</b> in the Search Box. Press Enter on the keyboard	The Competencies Form (PA21.1) will open.	Competencies Form (PA21.1) can be used to track information such as: communication skills, language skills, and/or the ability to type a certain amount of words per minute.
2	Company Field	R	Field should default to Company '1'. If field is not Company '1', Type or Select '1'.		Company should always be '1'
3	Employee Field	R	Type the employee's EIN.	System will display the employees name at the end of the field after advancing out of the field.	You must enter the correct EIN.

No.	HRIS Field	Required (R) Optional	Step / Action	Expected Results	Notes / Additional Information
4	In acciona Destata a	(O)	Clieb In accine	LIDIC will access	momacion
4	Inquire Button	R	Click Inquire	HRIS will access needed information for the EIN  Message "Inquiry Complete" will appear in the lower left corner.	
5	FC field	R	Type 'A' in the FC field to add a new competency.  Type 'C' in the FC field to change an existing competency,  Type 'D' in the FC field to delete an existing competency.		Notes If 'D' is selected and no other changes are required, skip to step 17
6	<b>Competency</b> Field	R	Type or Select from the drop down menu the competency you are adding the employee's record.	Type and Description of Competency will appear after entry.	
7	<b>Date Acquired</b> Field	0	Type or Select from the drop down the date the employee acquired the competency, if available.		Format: MMDDYY
8	Last Used Field	0	Type or Select from the drop down the date the employee last used the competency, if available.		Format: MMDDYY
9	Rating Field	0	Type the performance rating for the employee's competency		Field allows for 3 numeric characters.
					Example: 333.00

# Competencies Form (PA21.1)

(Image 6)



#### Steps 10-17 of 17

(Image 6, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	Proficiency Field	0	Leave this field BLANK.		Valid values are: FAILED INCOMPLETE PASSED
11	Main Tab – Verified Field	0	Type or Select from the drop down whether or not the Competency has been verified.		Valid values are: N = No Y = Yes *The default value is Y
12	Main Tab – Source Field	0	Leave this field BLANK.		
13	Main Tab – Renewal Field	0	Type or Select from the drop down the date the employee must renew the competency, if applicable.		Notes If you leave this field blank and select a Renewal Cycle, the system calculates the renewal date based on the Date Acquired field.



No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information	
14	Main Tab – Company Sponsor Field	0	Type or Select from the drop down menu if the competency was company sponsored.		Valid values are: N = No Y = Yes *The default value is N	
15	Main Tab – Renewal Cycle Field	0	Type or Select the frequency in with which the competency must be renewed, if applicable.		Notes  If you leave the Renewal field blank, this field can be used to calculate the renewal date.  Valid values are: AN = ANNUAL QT = Quarterly ST = Semi- Annual  Annual  2Y = 2 years 3Y = 3 years 4Y = 4 years 5Y = 5 years 6Y = 6 years 7Y = 7 years 8Y = 8 years 9Y = 9 years	
16	Main Tab – Instructor Field	0	Type the name of the employee's instructor, if available.			
17	Change Buttons	R	Click 'Change' if adding/updating a recording, or deleting a record where information previously existed.	Message in the lower left corner "Change Complete - Continue".	Action is processed and saved.	