HRIS – Human Resources Information Solution

# **RESOURCE GUIDE:** AGENCY HR GENERALIST - PROCESSING A PERSONAL INFORMATION CHANGE

# AGENCY HR GENERALIST - PROCESSING A PERSONAL INFORMATION CHANGE

## Table of Contents

# Introduction

A personnel action is performed upon an employee's request to change their personal information. A Personal Information change could be the result of an employee change to:

- Home address, supplemental address, home phone number
- Information as a result of a life event, for example, marriage, divorce, etc.
- Information in the employee's record, for example, veteran status, and disability
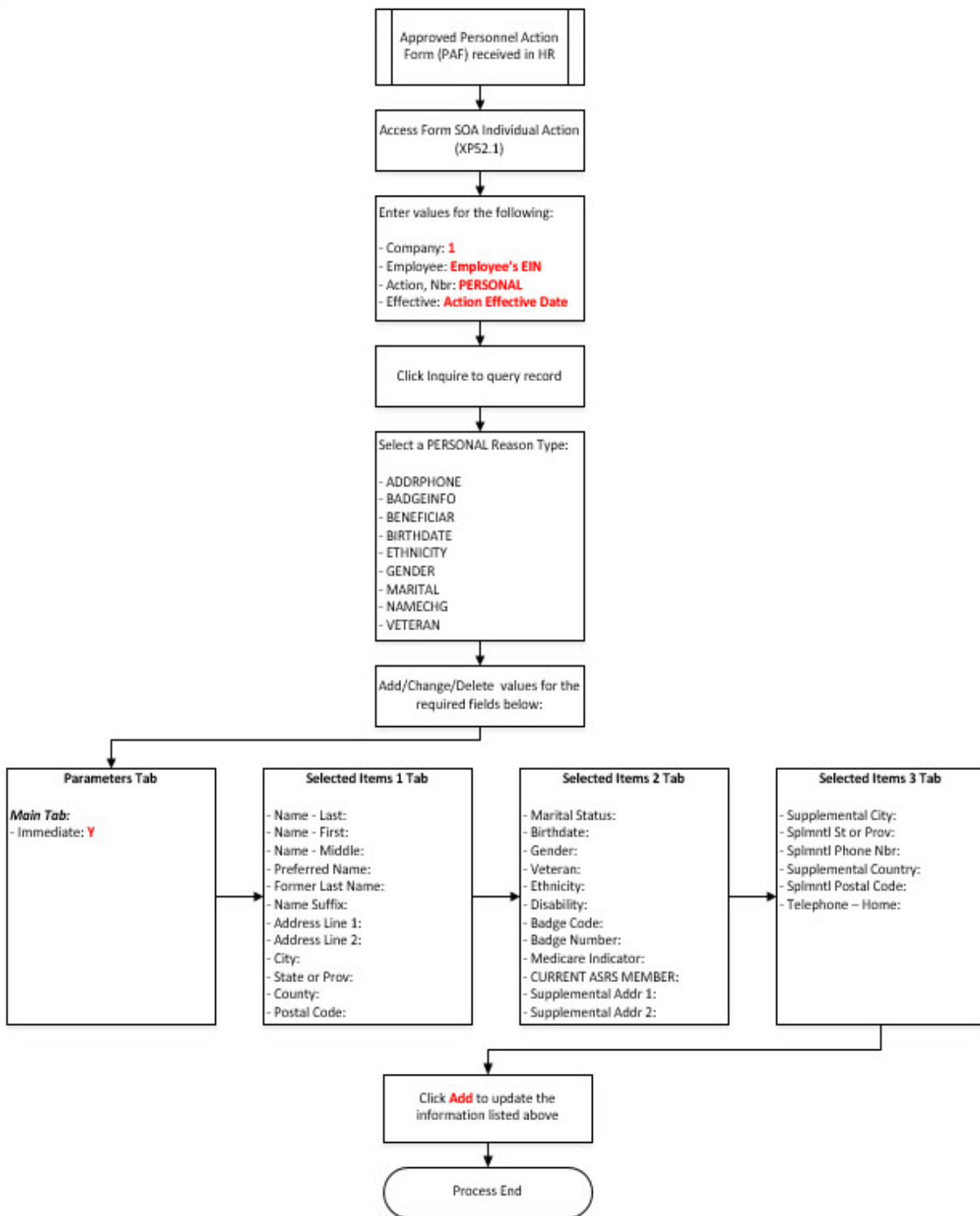
This personnel action is performed using the *Individual Action Form (XP52.1)*. The *Individual Action Form (XP52.1)* displays the current information for the employee along with fields to enter the new information.

*Notes:*
- *HRIS requires a Reason Code for all personnel actions 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 Flow Chart

## Personal Information

```
┌──────────────────────────────┐
│ Approved Personnel Action     │
│ Form (PAF) received in HR     │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│ Access Form SOA Individual    │
│ Action (XP52.1)               │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│ Enter values for the following:│
│                                │
│ - Company: 1                   │
│ - Employee: Employee's EIN     │
│ - Action, Nbr: PERSONAL        │
│ - Effective: Action Effective Date │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│ Click Inquire to query record │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│ Select a PERSONAL Reason Type:│
│                                │
│ - ADDRPHONE                    │
│ - BADGEINFO                    │
│ - BENEFICIAR                   │
│ - BIRTHDATE                    │
│ - ETHNICITY                    │
│ - GENDER                       │
│ - MARITAL                      │
│ - NAMECHG                      │
│ - VETERAN                      │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│ Add/Change/Delete values for the│
│ required fields below:          │
└──────────────────────────────┘
```

| Parameters Tab | Selected Items 1 Tab | Selected Items 2 Tab | Selected Items 3 Tab |
|---|---|---|---|
| **Main Tab:**<br>- Immediate: **Y** | - Name - Last:<br>- Name - First:<br>- Name - Middle:<br>- Preferred Name:<br>- Former Last Name:<br>- Name Suffix:<br>- Address Line 1:<br>- Address Line 2:<br>- City:<br>- State or Prov:<br>- County:<br>- Postal Code: | - Marital Status:<br>- Birthdate:<br>- Gender:<br>- Veteran:<br>- Ethnicity:<br>- Disability:<br>- Badge Code:<br>- Badge Number:<br>- Medicare Indicator:<br>- CURRENT ASRS MEMBER:<br>- Supplemental Addr 1:<br>- Supplemental Addr 2: | - Supplemental City:<br>- Splmntl St or Prov:<br>- Splmntl Phone Nbr:<br>- Supplemental Country:<br>- Splmntl Postal Code:<br>- Telephone – Home: |

```
┌──────────────────────────────┐
│ Click Add to update the        │
│ information listed above        │
└──────────────────────────────┘
              │
              ▼
         (  Process End  )
```

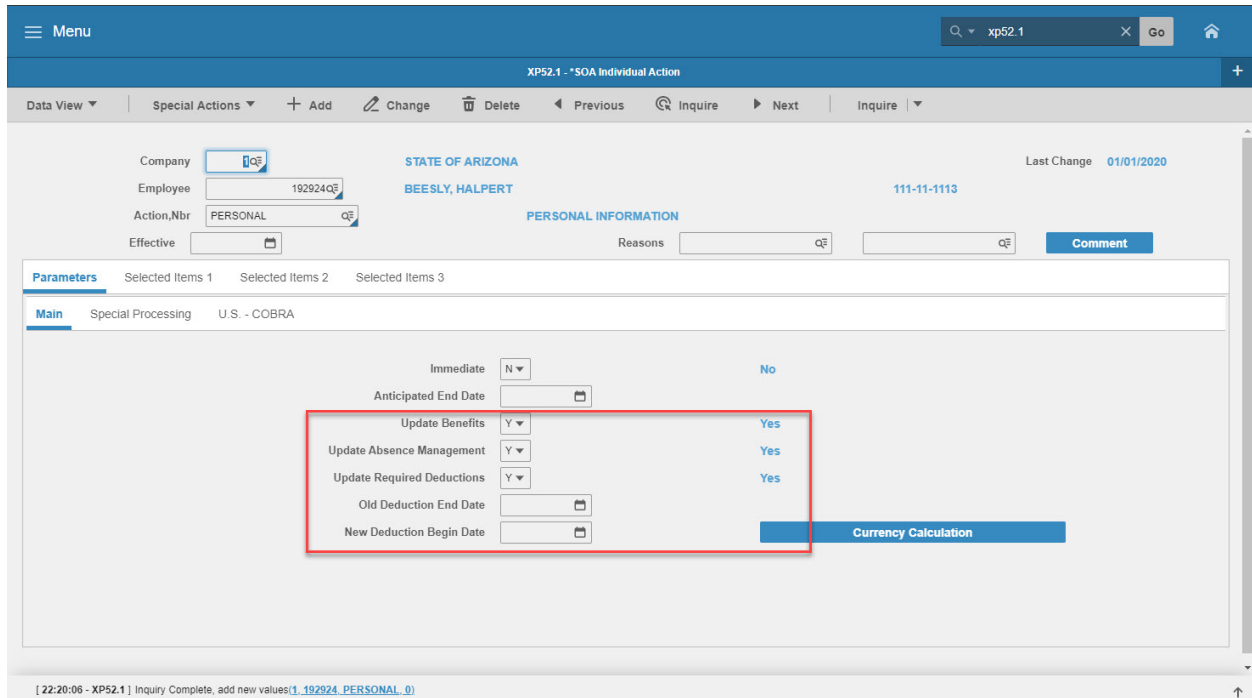# Individual Action (XP52.1) Parameters Tab (PERSONAL) – Main Tab

(Image 1)



## Steps 1-9 of 17

(Image 1, Table 1

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| 1 | Search Box | R | Type **XP52.1** in the Search Box. Press ENTER 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 bring up 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 populate the appropriate fields that are needed to complete this |  |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | | | | action. | |
| 5 | **Effective** Field | R | Type the Effective Date of the action. | | Date is formatted as MMDDYY |
| 6 | **Reasons –** First Box Field | R | Type or use the Drop Down to enter the reason code for the Personal Information Change. | | One reason code is required. The reason codes are smart coded. |
| | **Reasons -** Second Box Field | O | Type or use the Drop Down to enter the 2nd Reason Code for the Personal Information Change. | | The 2nd 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 | **Inquire** Button | R | Click Inquire | You should get message "Inquiry Complete, add new values" in the lower left corner.<br><br>The system will populate the required fields that are needed and will default all 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 batch 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** Field | R | Leave Blank | This field must be blank. | |

# Individual Action (XP52.1) Parameters Tab (PERSONAL) – Main Tab

(Image 1)



## Steps 10-17 of 17

(Image 1, Table 2)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| 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 Absence Management** Field | R | Type or Select from the Drop Down 'Y – Yes'. | This field must contain a Y. | |
| 12 | **Update Required Deductions** Field | R | 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** | R | Leave Blank | When the action is processed the system will | |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | Field | | | default in the correct date. | |
| 15 | **Occurrence Type** Field | R | Leave Blank | This field must be blank. | Do not enter anything into this field. |
| 16 | **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 |
| 17 | **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. |

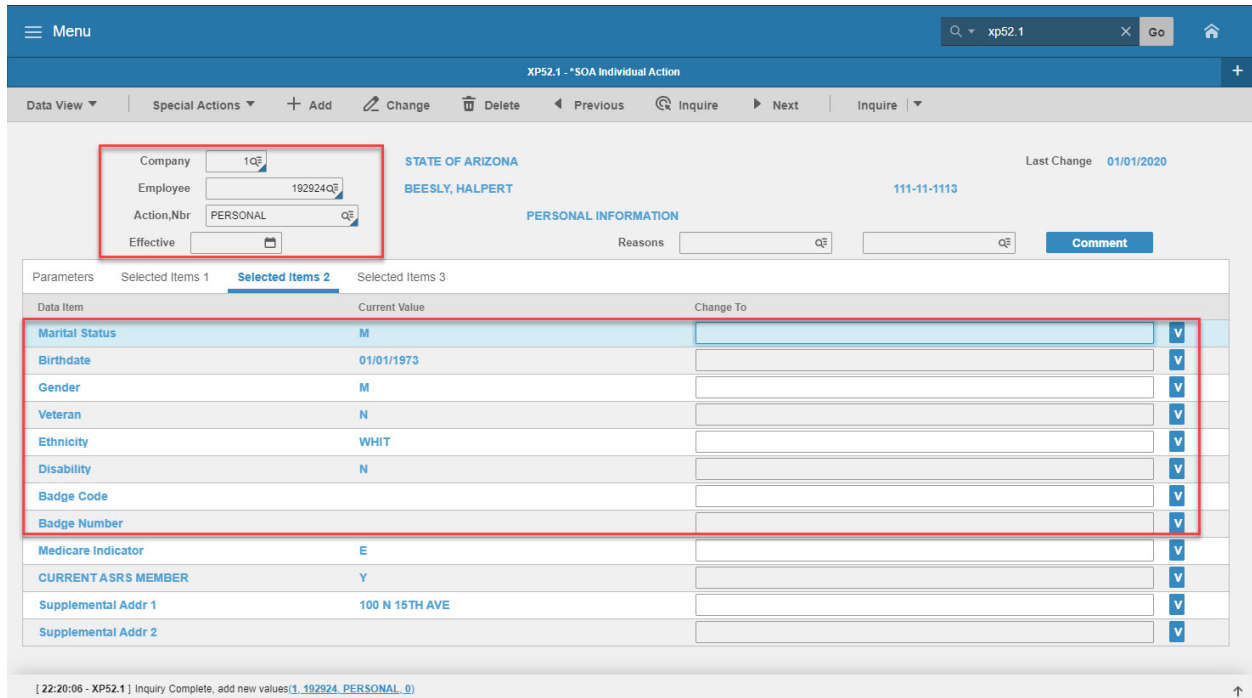# Individual Action (XP52.1) Selected Items 1 Tab (PERSONAL)

(Image 2)



## Steps 1-4 of 4

(Image 2, Table 1)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|-----|------------|---------------------------|---------------|------------------|-------------------------------|
| 1 | **Company** field<br>**Employee** field<br>**Action, Nbr** field<br><br>**Requisition** field<br><br>**Effective Date** field<br>**Reasons** fields | R<br>R<br>R<br><br>R<br><br>R<br><br>R | No Action Required, these fields will default to | | |
| 2 | **Name-Last** Field<br>**Name-First** Field<br>**Name-Middle** Field<br>**Preferred Name** Field<br>**Former Last Name** Field<br>**Name Suffix** | O<br><br>O<br><br>O<br><br>O<br><br>O<br><br>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. |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | Field | | | | |
| 3 | **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 |
| 4 | **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)

(Image 3)



## Steps 1-9 of 13

(Image 3, Table 1)

| No. | HRIS Field | Required (R) Optional (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 | | |
| 2 | **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: M = Married S = Single D = Divorced W = Widowed L = Legally Separated O = Significant Other P = Domestic Partner C = Common Law R = Separated |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | | | | | U = Unmarried |
| 3 | **Birthdate** Field | O | Verify the information that is populated from the Employee's current record.<br><br>If applicable, type in the Employee's NEW value in the Change To field. | | Birthdate will be formatted: MM/DD/YYYY |
| 4 | **Gender** Field | O | Verify the information that is populated from the Employee's current record.<br><br>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 |
| 5 | **Veteran** Field | O | Verify the information that is populated from the Employee's current record.<br><br>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. |
| 6 | **Ethnicity** Field | O | Verify the information that is populated from the Employee's current record.<br><br>If applicable, key or use the drop down to enter the Employee's NEW value in the Change To field. | | State of Arizona values are:<br>AIND = AMERICAN INDIAN/ALASKA<br>ASA = ASIAN<br>BLCK = BLACK/AFRICAN AMERICAN<br>HISP = HISPANIC/LATIONO<br>HPAC = NATV HAWAIIAN/OTHER PACIFIC ISLANDER<br>TWOM = TWO OR MORE RACES |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | | | | | UNSP = UNSPECIFIED WHIT = |
| 7 | **Disability** Field | O | Verify the information that is populated from the Employee's current record.<br><br>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. |
| 8 | **Badge Code** Field | O | If applicable for your agency, verify the information that is populated from the Employee's current record.<br><br>If information needs to be updated, key in the NEW value in the Change To field. | | |
| 9 | **Badge Number** Field | O | If applicable to your agency, verify the information that is populated for the Employee's Badge Number. If applicable, type in the NEW value in the Change To field. | | |

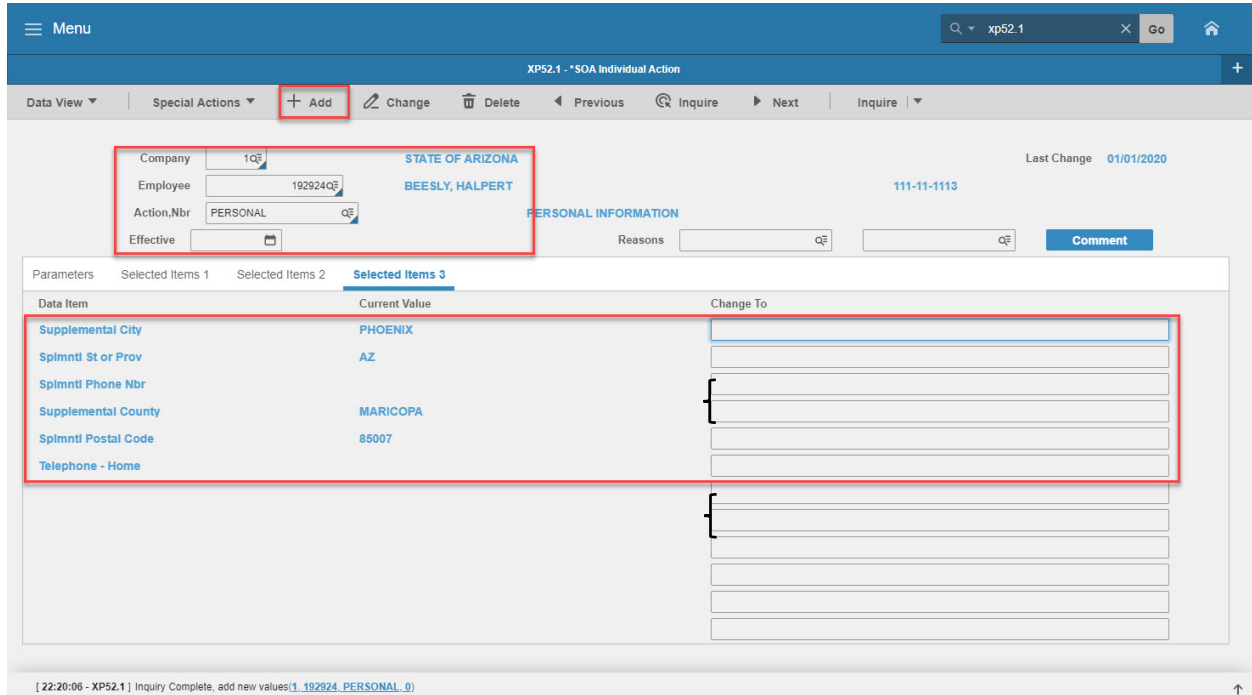# Individual Action (XP52.1) Selected Items 2 Tab (PERSONAL)

(Image 3)



## Steps 10-13 of 13

(Image 3, Table 2)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| 10 | **Medicare Indicator** Field | O | Verify the information that is populated from the Employee's current record.<br><br>If applicable, key or use the drop down to enter the NEW value in the Change To field. | | Valid Values are:<br>A – Medicare Part A<br>B – Medicare Part B<br>C – Medicare Part A & B<br>D – Medicare Part Unknown<br>E – No Medicare<br>F – Medicare Part A & B & D<br>G – Medicare Part A & D<br>H – Medicare Part B & D<br>I – Medicare Part D |
| 11 | **Current ASRS Member** Field | O | Verify the information that is populated from the Employee's current record.<br>If applicable, key or use the drop down to enter the NEW value in the | | |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
|  |  |  | Change To field. |  |  |
| 12 | **Supplemental Addr 1** Field <br><br> **Supplemental Addr 2** Field | O <br><br> O | These fields will default in from the Home Address. <br><br> Type in the Employee's Supplemental Address (if applicable – see notes). <br><br> 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 <br> *Failure to use a valid Arizona address will result in pay and tax errors. |
| 13 | **Selected Items 3** Tab | R | Click on **Selected Items** 3 to see additional fields that may need to be changed. |  |  |

# Individual Action (XP52.1) Selected Items 3 Tab (PERSONAL)

(Image 3)



## Steps 1-6 of 6

(Image 4, Table 1)

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| 1 | **Company** field<br>**Employee** field<br>**Action, Nbr** field<br>**Effective Date** field<br>**Reasons** fields | R<br>R<br>R<br>R<br>R | No Action Required, these fields will default to | | |
| 2 | **Supplemental City** Field<br>**Splmntl or Prov** Field | O | These fields will default in from the Home Address.<br><br>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<br>*Failure to use a valid Arizona address will result in pay and tax errors. |
| 3 | **Splmntl Phone** Field | O | Verify the information that is | | Format for Phone is XXX.XXX.XXXX (ex. |

| No. | HRIS Field | Required (R) Optional (O) | Step / Action | Expected Results | Notes / Additional Information |
|---|---|---|---|---|---|
| | | | populated from the Employee's current record.<br><br>If information needs to be updated, key in the NEW value in the Change To field. | | 123.456.7890). The phone number must contain periods, not dashes. |
| 4 | **Supplemental County** Field **Splmntl Postal Code** Field | O | These fields will default in from the Home Address.<br><br>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<br>*Failure to use a valid Arizona address will result in pay and tax errors. |
| 5 | **Telephone – Home** Field | O | Verify the information that is populated from the Employee's current record.<br><br>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** .