

HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY HR GENERALIST - PROCESSING A STATUS CHANGE

AGENCY HR GENERALIST - PROCESSING A STATUS CHANGE

Table of Contents

INTRODUCTION.....3

HRIS STATUS CHANGE PROCESS FLOW4

INDIVIDUAL ACTION (XP52.1) PARAMETERS TAB (STATUS CHANGE) – MAIN TAB5

 STEPS 1-9 OF 14.....5

INDIVIDUAL ACTION (XP52.1) PARAMETERS TAB (STATUS CHANGE) – MAIN TAB7

 STEPS 10-14 OF 14.....7

INDIVIDUAL ACTION (XP52.1) SELECTED ITEMS 1 TAB (STATUS CHANGE)8

 STEPS 1-9 OF 14.....8

INDIVIDUAL ACTION (XP52.1) SELECTED ITEMS 1 TAB (STATUS CHANGE)10

 STEPS 10-14 OF 14.....10

Introduction

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

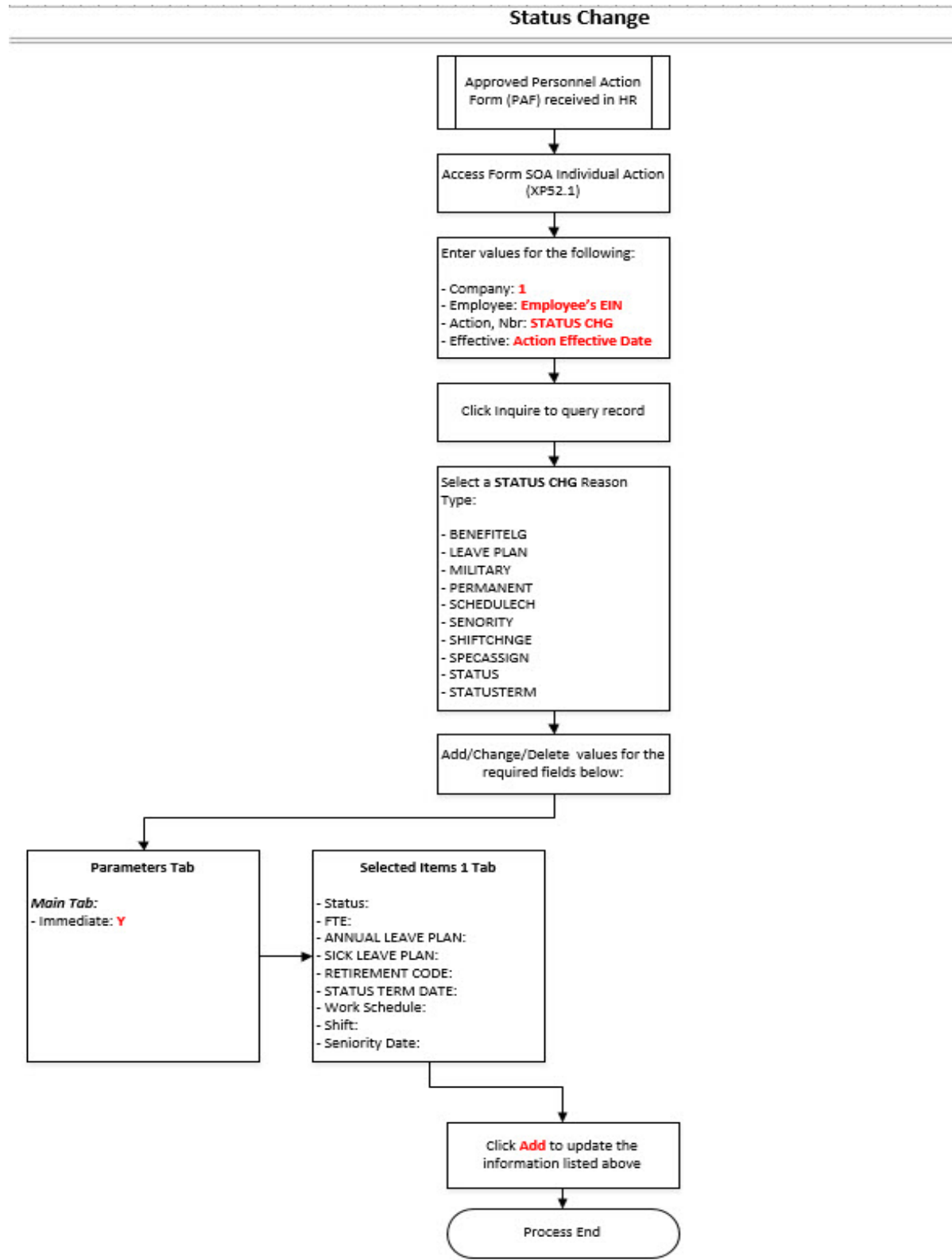
- Employment Status: covered, uncovered, temporary, special assignment, (and others)
- Benefits Eligibility (benefits or no benefits)
- Part-Time or Full-Time FTE (included in headcounts for budgeting purposes)

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

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

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 If a Separation Action was keyed in error or has been rescinded, submit a Cherwell Ticket and complete a Personnel Action History Correction.

HRIS Status Change Process Flow



Individual Action (XP52.1) Parameters Tab (STATUS CHANGE) – Main Tab

(Image 1)

Steps 1-9 of 14

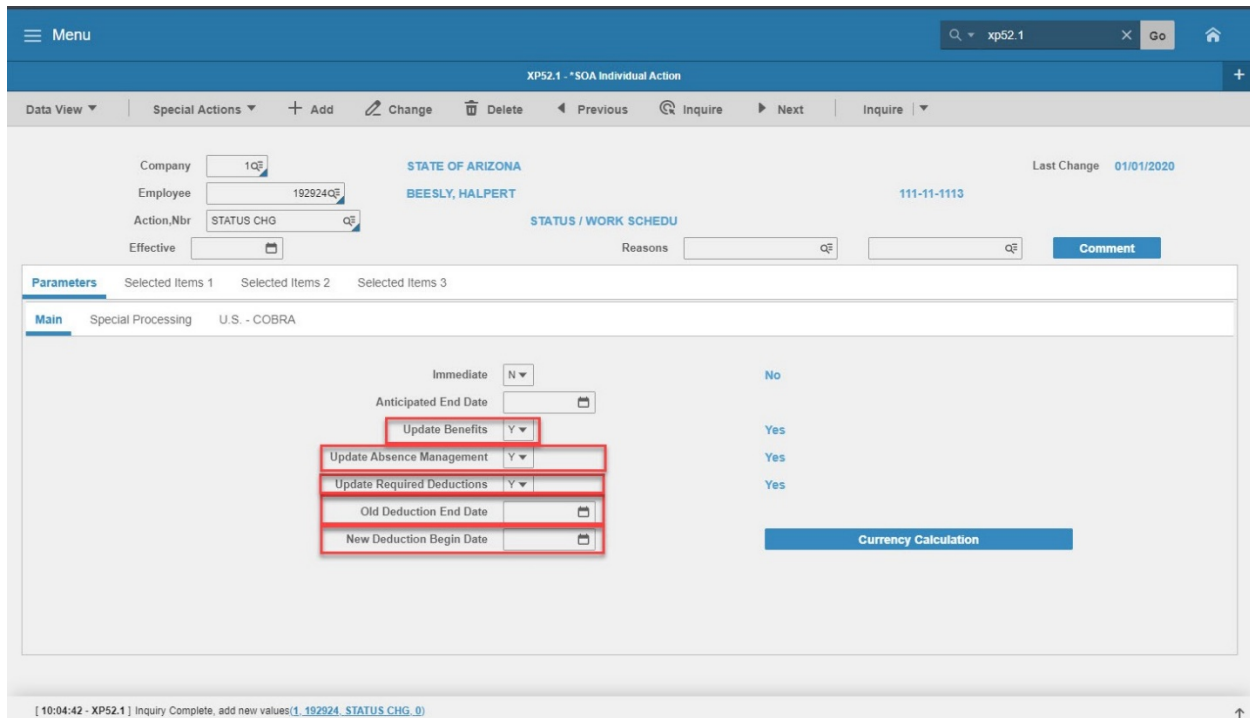
(Image 1, Table 1)

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 ' STATUS CHANGE '.	Based on the Action Nbr. selected the system will populate the	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
				appropriate fields that are needed to complete this action.	
5	Effective Field	R	Type the Effective Date of the action.	The Effective Date of the Job Change will be in this field.	Date is formatted as MMDDYY
6	Reasons – First Box Field	R	Type or use the Drop Down to enter the reason code for the Job Change Action.		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 2 nd Reason Code for the Status Change.		The 2 nd 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	<p>You should get message "Inquiry Complete, add new values" in the lower left corner.</p> <p>The system will populate the required fields that are needed and will default all information from the Employee's record.</p>	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 (STATUS CHANGE) – Main Tab

(Image 1)



The screenshot shows the 'Parameters' tab for an 'Individual Action (XP52.1)'. The main tab is 'Main'. The form includes the following fields and options:

- Company: 100 (STATE OF ARIZONA)
- Employee: 19292400 (BEEESLY, HALPERT)
- Action Nbr: STATUS CHG
- Effective: [Calendar icon]
- Reasons: [Text input]
- Comment: [Text input]
- Parameters: Selected Items 1, Selected Items 2, Selected Items 3
- Immediate: N
- Anticipated End Date: [Calendar icon]
- Update Benefits: Y
- Update Absence Management: Y
- Update Required Deductions: Y
- Old Deduction End Date: [Calendar icon]
- New Deduction Begin Date: [Calendar icon]
- Options: No, Yes, Yes, Yes
- Buttons: Currency Calculation

Steps 10-14 of 14

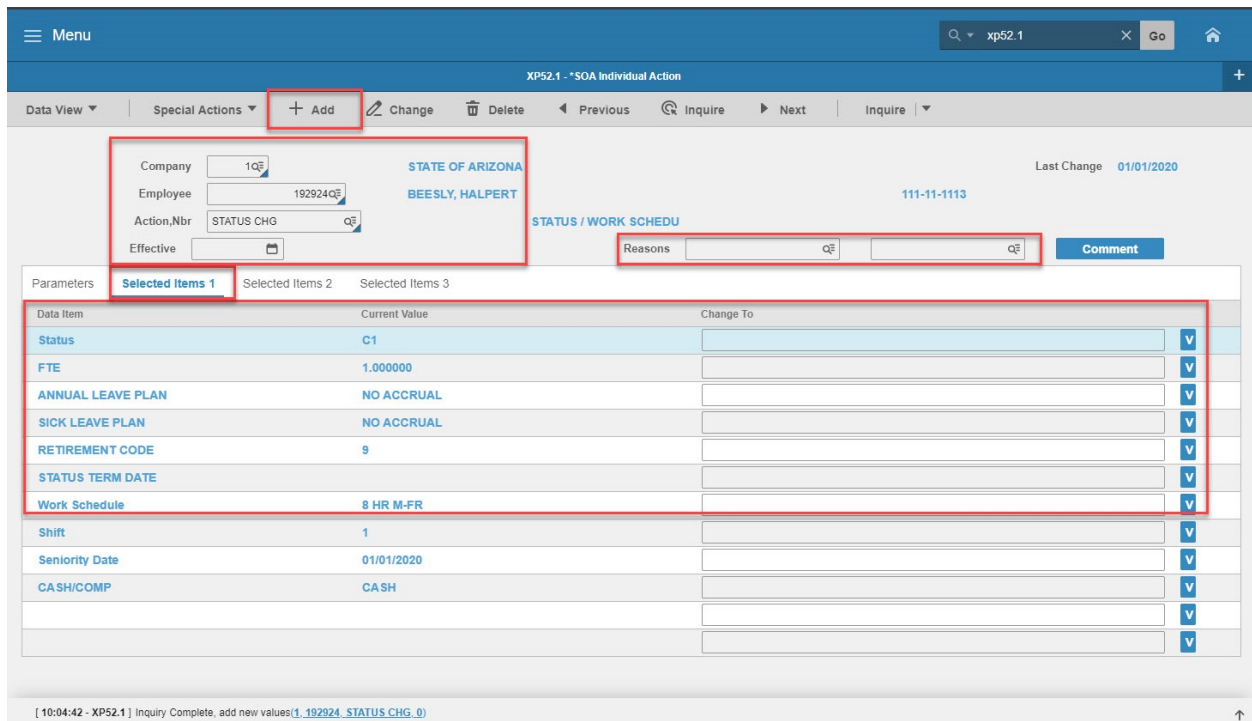
(Image 1, Table 2)

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.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field
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.	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
14	New Deduction Begin Date Field	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 CHANGE)

(Image 2)



The screenshot shows the 'Individual Action (XP52.1) Selected Items 1 Tab (STATUS CHANGE)' interface. The form includes fields for Company (10E), Employee (1929240E), Action Nbr (STATUS CHG 0E), and Effective date. A table of parameters is displayed below, with the 'Selected Items 1' tab highlighted. The table lists data items with their current values and change-to fields.

Data Item	Current Value	Change To
Status	C1	
FTE	1.000000	
ANNUAL LEAVE PLAN	NO ACCRUAL	
SICK LEAVE PLAN	NO ACCRUAL	
RETIREMENT CODE	9	
STATUS TERM DATE		
Work Schedule	8 HR M-FR	
Shift	1	
Seniority Date	01/01/2020	
CASH/COMP	CASH	

Steps 1-9 of 14

(Image 2, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Selected Items 1	R	Click on the Selected Items 1 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	Company field Employee Field Action, Nbr Field	R R R	No Action Required, these fields will default to what was		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Effective Date Field	R	entered on the Parameters Tab.		
	Reasons Fields	R			
3	Status Field	R	Type or Select from the drop down the Employee's NEW Status. If applicable, type in the NEW Status for the employee.		The Employee Status Code has a direct effect 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	FTE Field	R	Review current FTE for Employee. If applicable, type in the NEW FTE for the employee.		Current values are: Full time = 1.0 ¾ time = .75 ½ time = .50 ¼ time = .25
5	ANNUAL LEAVE PLAN Field	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, FTE, and At-Will Status. Example: If the Employee is a Uncovered with an FTE .5 employee they must be in the LPANSPUNC2 ½ time Annual Leave Plan.
6	SICK LEAVE PLAN Field	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 Uncovered ½ time employee they must be in the LPSKSTAND2 ½ time Sick Leave Plan.
7	RETIREMENT CODE Field	R	Review current Retirement Code. If applicable, type in the NEW Retirement Code for the Employee.		
8	STATUS TERM DATE Field	R	Review current Status Term Date. If applicable, type in		Date is formatted as MMDDYYYY. Example - If the Employee

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			the NEW Status Term Date for the Employee.		is being promoted and will be put in promotional probation status, there must be a Status Term Date.
9	Work Schedule 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.

Individual Action (XP52.1) Selected Items 1 Tab (STATUS CHANGE)

(Image 2)

Steps 10-14 of 14

(Image 2, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	Shift Field	R	Review current		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			Shift. If applicable, type in the NEW Shift value for the Employee.		
11	Seniority Date Field	O	Review current Seniority Date . If applicable, type in the NEW Seniority Date for the Employee.		Date is formatted as MMDDYYYY.
12	CASH/COMP Field	R	Review current CASH/COMP. If applicable, type in the NEW CASH/COMP code for the Employee.		
13	Selected Items 2 and 3	O	Not applicable		Selected Items 2 and 3 contain no fields; therefore you do not need to click on these links for this action.
14	Add button	R	Click Add	Message in lower left corner "Add-Complete; continue".	