

HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY HR GENERALIST - USER FIELD CHANGE ENTRY

AGENCY HR GENERALIST - USER FIELD CHANGE ENTRY

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Introduction

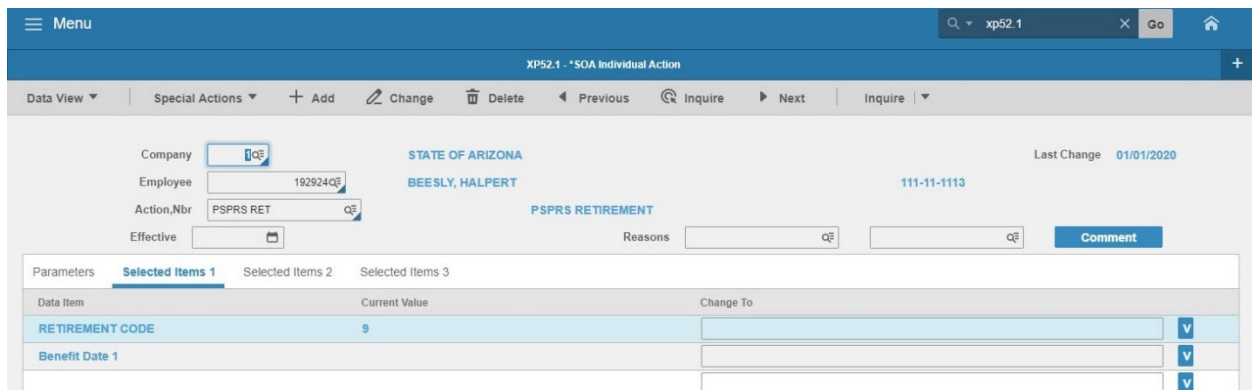
HRIS provides Employee User Fields to address specific needs required by the State of Arizona. It is not necessary to complete entry on all of the User Fields.

However, the following User Fields are “required fields” in the employee’s HRIS file.

- ACA
- ANNUAL LEAVE PLAN
- CASH/COMP
- CURRENT ASRS MEMBER
- **RETIREMENT CODE******
- SICK LEAVE PLAN

NOTE:

****** If the employee is enrolled in the Public Safety Personnel Retirement System, you MUST use the PSPRS RET personnel action to enter the correct Retirement Code as well as the Benefit Date 1. DO NOT enter the Retirement Code on the USERFLDCHG action.**

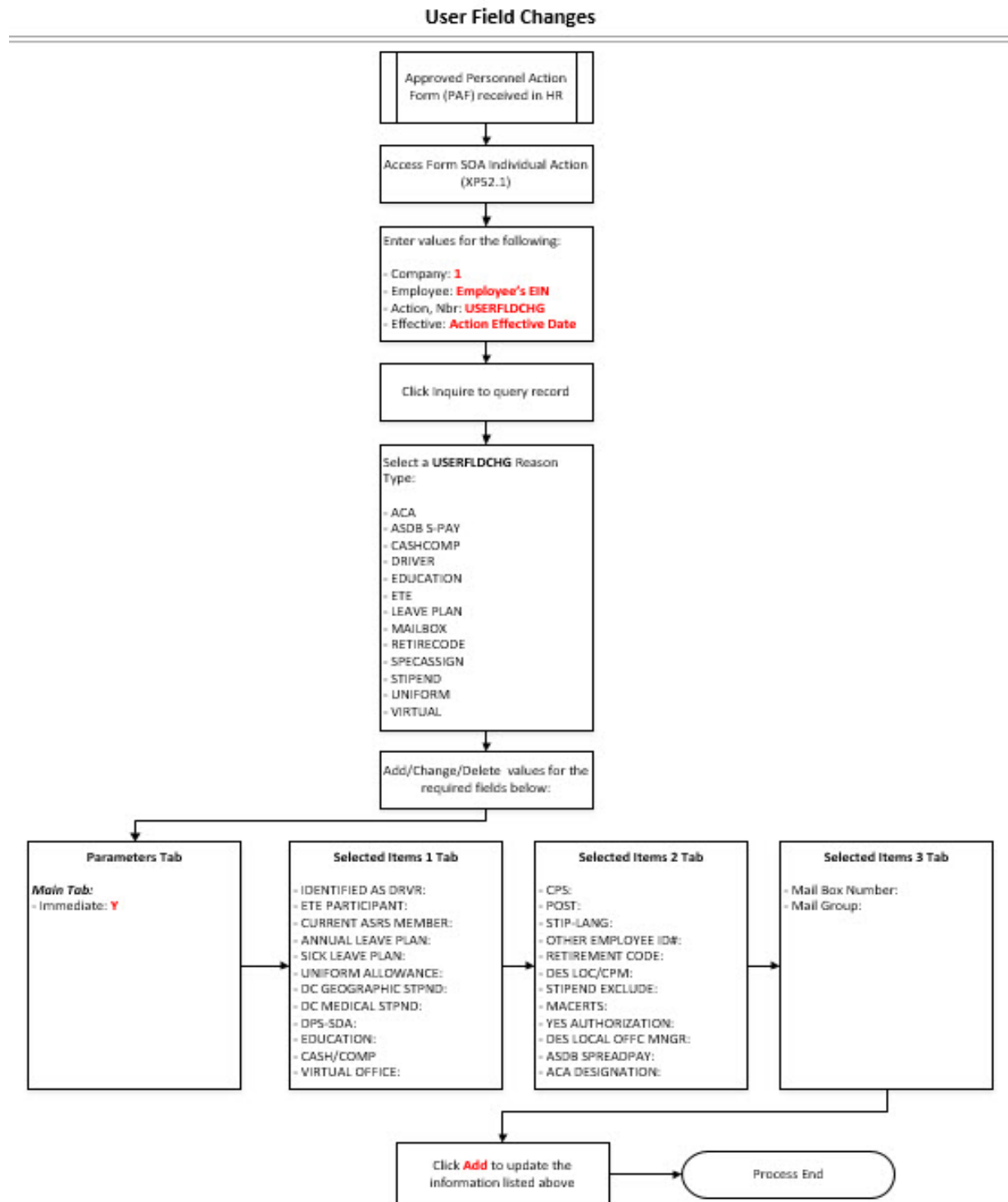


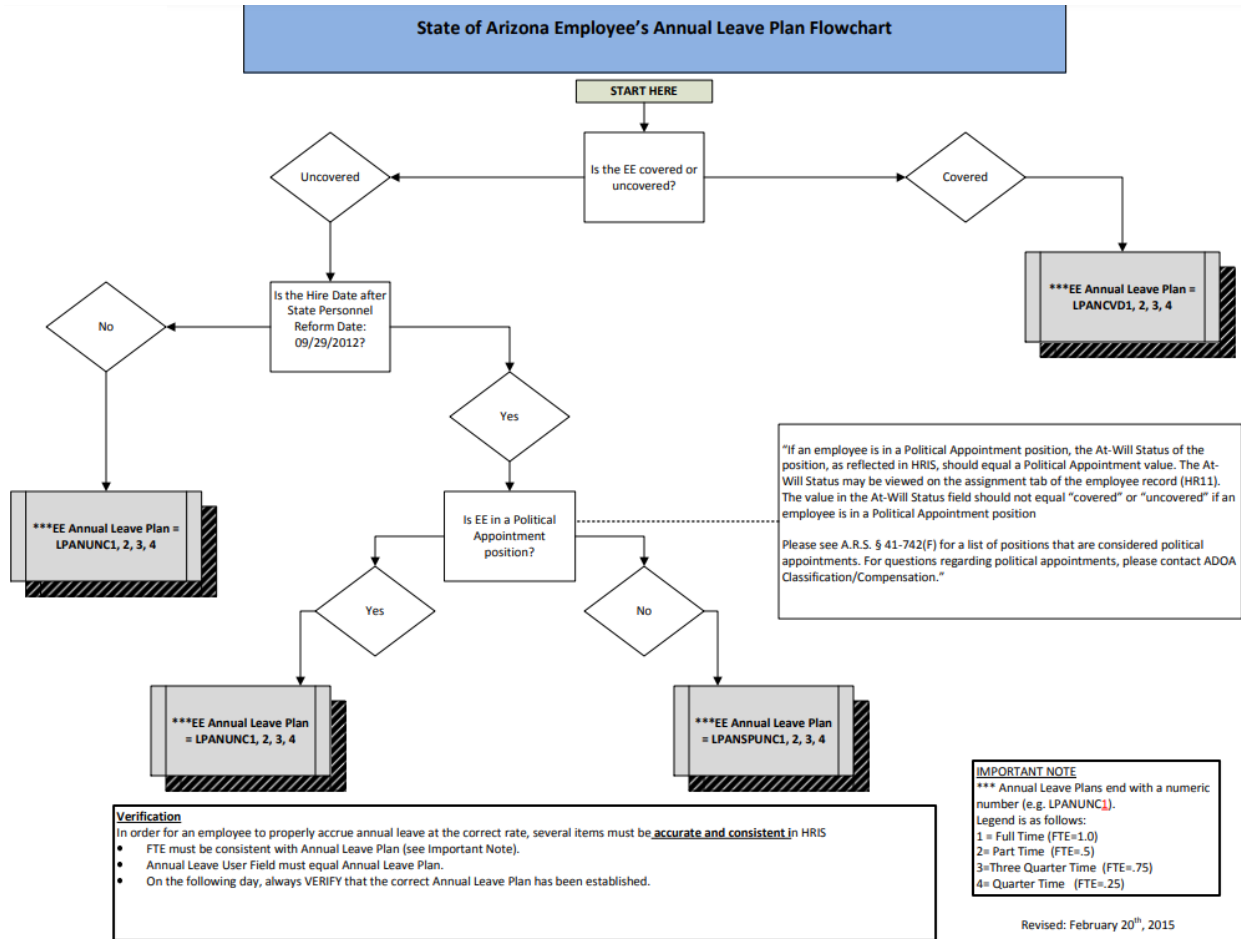
The screenshot shows the 'XP52.1 - SOA Individual Action' form. At the top, there is a search bar with 'xp52.1' and a 'Go' button. Below the search bar is a navigation menu with options like 'Data View', 'Special Actions', 'Add', 'Change', 'Delete', 'Previous', 'Inquire', 'Next', and 'Inquire'. The main form area contains several fields: 'Company' (STATE OF ARIZONA), 'Employee' (BEEPLY, HALPERT), 'Action Nbr' (PSPRS RET), and 'Effective' date. There are also 'Reasons' fields and a 'Comment' button. At the bottom, there is a table with columns for 'Data Item', 'Current Value', and 'Change To'. The table contains two rows: 'RETIREMENT CODE' with a current value of '9' and 'Benefit Date 1'.

Data Item	Current Value	Change To
RETIREMENT CODE	9	
Benefit Date 1		

The HR Generalist completes a personnel action using the Individual Action Form (XP52.1). The Individual Action Form (XP52.1) displays the current information stored on the employee’s record, along with fields to enter updated information.

User Field Changes Process Flow





Individual Action (XP52.1) – Parameters Tab (Pending USERFLDCHG)

(Image 1)

The screenshot displays the 'Individual Action (XP52.1) - SOA Individual Action' interface. At the top, a search bar contains 'xp52.1'. The navigation bar includes 'Data View', 'Special Actions', '+ Add', 'Change', 'Delete', 'Previous', 'Inquire' (highlighted), 'Next', and 'Inquire'. The main form area shows the following details:

- Company:** 1
- Employee:** 192924
- Action Nbr:** USERFLDCHG
- Effective:** [Calendar icon]
- STATE OF ARIZONA**
- BEEESLY, HALPERT**
- 111-11-1113**
- USER FIELD CHANGE**
- Reasons:** [Two input fields]
- Comment:** [Text area]

The 'Parameters' section includes:

- 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]
- Currency Calculation:** [Button]

At the bottom, a status bar reads: [10:49:27 - XP52.1] Inquiry Complete, add new values(1, 192924, USERFLDCHG, 0)

Steps 1-9 of 14

(Image 1, Table 1)

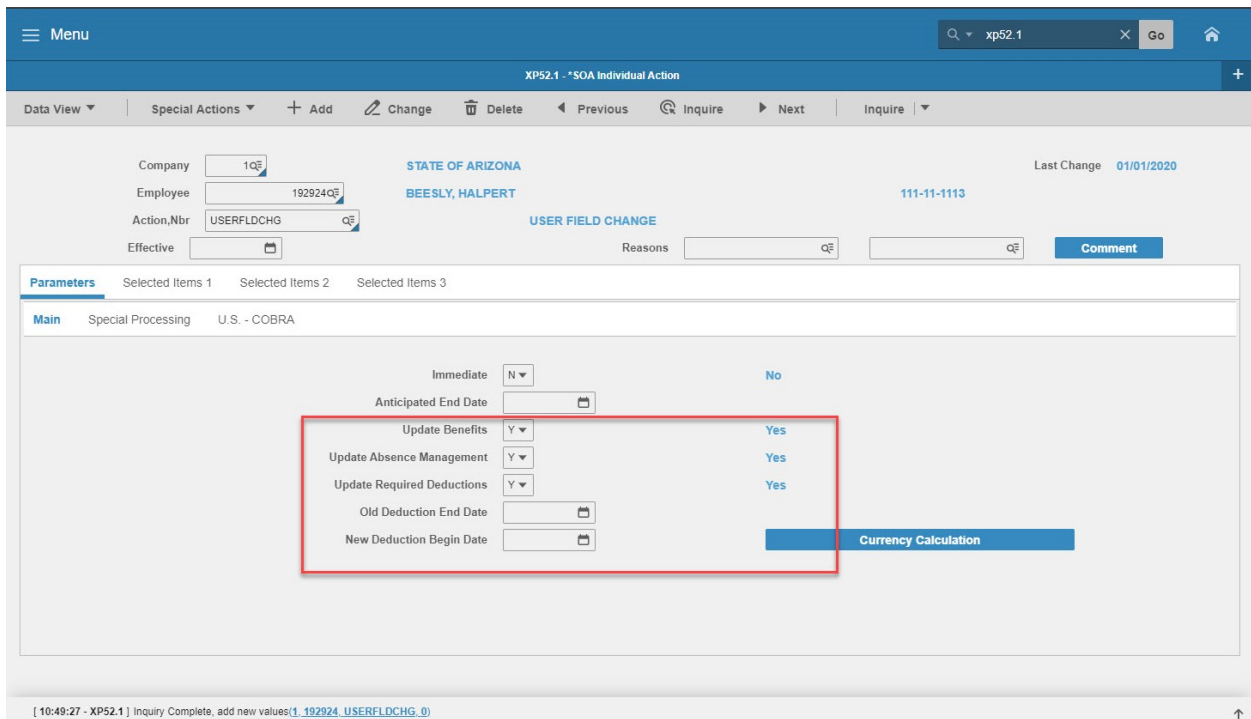
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Search Box	R	Type XP52.1 in the Search Box. Press <i>Enter</i> on the keyboard	The Individual Personnel Action (XP52.1) opens.	
2	Company Field	R	Type 1 in Company field.	System will access information 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 bring up Employee's information.	You must enter the correct EIN. After you enter the EIN verify Employee's Name to ensure you have the right EIN.
4	Action Nbr Field	R	Type or use the Drop Down to	Based on the Action Nbr.	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			enter action 'USERFLDCHG'.	selected, the system will populate 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 MMDDYY or MMDDYYYY
6	Reasons – First Box Field	R	Type or use the Drop Down to enter the reason code for the Action.		One reason code is required.
	Reasons - Second Box Field	O	Type or use the Drop Down to enter the 2 nd Reason Code for the Action.		The 2 nd Reason Code is not required, however, it can be used to better define the reason for the 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 and will default all information from the Employee's record.	DO NOT CLICK Add at this point!
8	Immediate Field	R	Type N in the Immediate Field.	Action will process with the nightly batch.	Only New Hire and Rehire Actions are processed immediately. All other HRIS Actions are processed during the nightly batch.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
9	Anticipated EndField	N/A	Leave Blank	This field must be blank.	

Individual Action (XP52.1) – Parameters Tab (Pending USERFLDCHG)

(Image 1)



The screenshot shows the 'Parameters' tab for an individual action. The highlighted section contains the following fields and values:

- Immediate: No
- Anticipated End Date: [Calendar icon]
- Update Benefits: Yes
- Update Absence Management: Yes
- Update Required Deductions: Yes
- Old Deduction End Date: [Calendar icon]
- New Deduction Begin Date: [Calendar icon]

A 'Currency Calculation' button is located to the right of the highlighted fields.

Steps 10-14 of 14

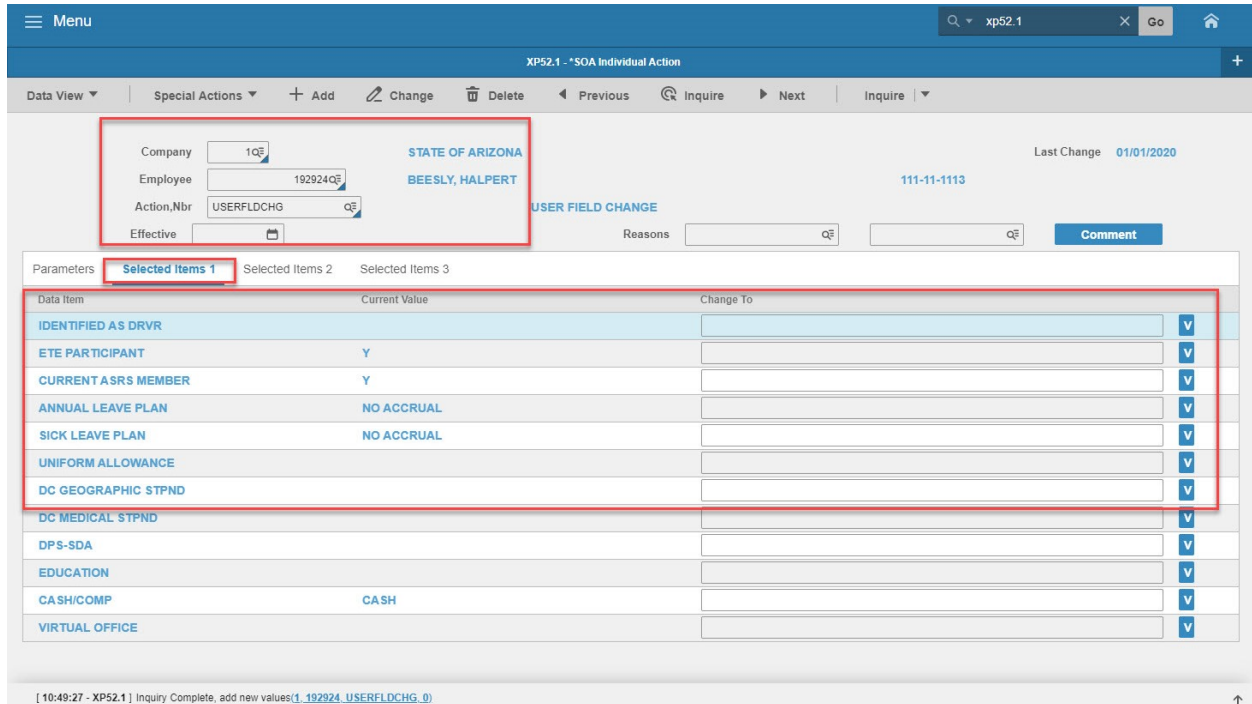
(Image 1, Table 2)

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' <u>must</u> be put in this field.
11	Update Absence Management Field	N/A	Leave Blank	This field must be blank.	
12	Update	R	Type or Select	This field must	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Required Deductions Field		from the Drop Down 'Y – Yes'.	contain a Y.	
13	Old Deduction End Date Field	R	Leave Blank	When the action is processed, the system will default in the right date.	
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 (Pending USERFLDCHG)

(Image 2)



Company: 10E STATE OF ARIZONA
 Employee: 1929240E BEESLY, HALPERT 111-11-1113
 Action, Nbr: USERFLDCHG 0E USER FIELD CHANGE
 Effective: [calendar icon] Reasons: [input] [input] Comment

Data Item	Current Value	Change To
IDENTIFIED AS DRVR		[input] v
ETE PARTICIPANT	Y	[input] v
CURRENT ASRS MEMBER	Y	[input] v
ANNUAL LEAVE PLAN	NO ACCRUAL	[input] v
SICK LEAVE PLAN	NO ACCRUAL	[input] v
UNIFORM ALLOWANCE		[input] v
DC GEOGRAPHIC STPND		[input] v
DC MEDICAL STPND		[input] v
DPS-SDA		[input] v
EDUCATION		[input] v
CASH/COMP	CASH	[input] v
VIRTUAL OFFICE		[input] v

[10:49:27 - XP52.1] Inquiry Complete, add new values(1, 192924, USERFLDCHG, 0)

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 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.		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
3	IDENTIFIED AS DRVR	O	Select correct value from drop down "V" on right		Used to identify approved drivers for the State
4	ETE PARTICIPANT	O	Select correct value from drop down "V" on right		Allows access to ETE time card processing
5	CURRENT ASRS MEMBER	R	Select correct value from drop down "V" on right		Y/N
6	ANNUAL LEAVE PLAN	R	Select correct value from drop down "V" on right If you need assistance in selecting the correct annual leave plan click on this link https://hr.az.gov/sites/default/files/media/Annual%20Leave.pdf .		Identifies Annual Leave plan
7	SICK LEAVE PLAN	R	Select correct value from drop down "V" on right		Identified Sick Leave plan
8	UNIFORM ALLOWANCE	O	Select correct value from drop down "V" on right		Used for Uniform Allowance stipend for some agencies (not all)
9	DC GEOGRAPHIC STPND	O	Select correct value from drop down "V" on right		Dept of Corrections use only

Individual Action (XP52.1) – Selected Items 1Tab (Pending USERFLDCHG)

(Image 2)

Company: 1QE, STATE OF ARIZONA, Last Change: 01/01/2020
 Employee: 192924QE, BEESLY, HALPERT, 111-11-1113
 Action, Nbr: USERFLDCHG, USER FIELD CHANGE
 Effective: [calendar icon], Reasons: [input], [input], Comment: [button]

Data Item	Current Value	Change To
IDENTIFIED AS DRVR		[dropdown]
ETE PARTICIPANT	Y	[dropdown]
CURRENT ASRS MEMBER	Y	[dropdown]
ANNUAL LEAVE PLAN	NO ACCRUAL	[dropdown]
SICK LEAVE PLAN	NO ACCRUAL	[dropdown]
UNIFORM ALLOWANCE		[dropdown]
DC GEOGRAPHIC STPND		[dropdown]
DC MEDICAL STPND		[dropdown]
DPS-SDA		[dropdown]
EDUCATION		[dropdown]
CASH/COMP	CASH	[dropdown]
VIRTUAL OFFICE		[dropdown]

[10:49:27 - XP52.1] Inquiry Complete, add new values(1_192924_USERFLDCHG_0)

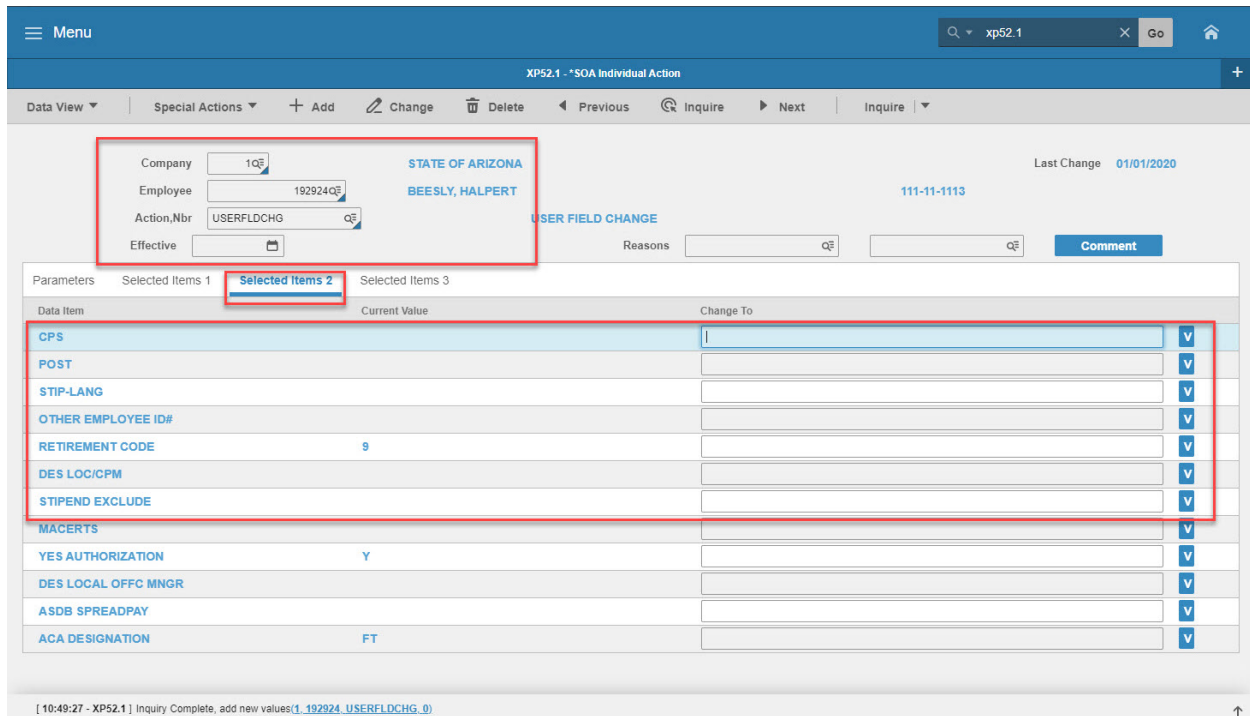
Steps 10-14 of 14

(Image 2, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	DC MEDICAL STPND	O	Select correct value from drop down "V" on right		Dept of Corrections use only
11	DPS-SDA	O	Select correct value from drop down "V" on right		Dept of Public Safety use only- Special Duty
12	EDUCATION	O	Select correct value from drop down "V" on right		
13	CASH/COMP	R	Select correct value from drop down "V" on right		Identifies employee's over time compensation choice
14	VIRTUAL OFFICE	O	Select correct value from drop down "V" on right		AHCCCS Virtual Office stipend use

Individual Action (XP52.1) – Selected Items 2 Tab (Pending USERFLDCHG)

(Image 3)



Company: 1QE STATE OF ARIZONA
 Employee: 192924QE BEESELY, HALPERT
 Action Nbr: USERFLDCHG
 Effective: [Calendar Icon]

Data Item	Current Value	Change To
CPS		
POST		
STIP-LANG		
OTHER EMPLOYEE ID#		
RETIREMENT CODE	9	
DES LOC/CPM		
STIPEND EXCLUDE		
MACERTS		
YES AUTHORIZATION	Y	
DES LOCAL OFFC MNGR		
ASDB SPREADPAY		
ACA DESIGNATION	FT	

Steps 1-9 of 14

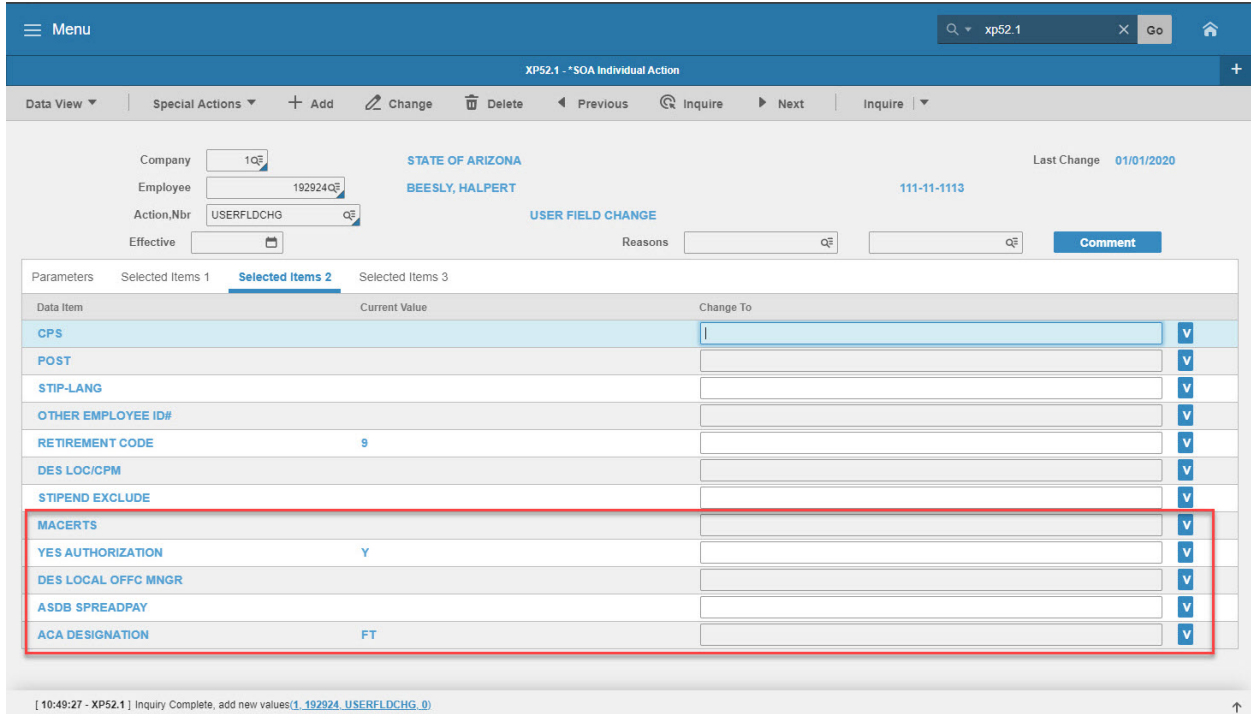
(Image 3, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Selected Items 2	R	Click on the Selected Items 2 tab.	The Selected Items 2 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 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.		

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
3	CPS	O	Select correct value from drop down "V" on right		Dept of Child Safety use only
4	POST	O	Select correct value from drop down "V" on right		State Parks LE Certification use
5	STIP-LANG	O	Select correct value from drop down "V" on right		Dept of Economic Security stipend use
6	OTHER EMPLOYEE ID	O	Free form field for agency use.		Can be anything an agency decides to track
7	RETIREMENT CODE	R	Select correct value from drop down "V" on right . This includes several different retirement systems. Do not use this field for PSPRS.		If the employee is enrolled in the Public Safety Personnel Retirement System, you MUST use the PSPRS RET personnel action to enter the correct Retirement Code as well as the Benefit Date 1. DO NOT enter the Retirement Code on the USERFLDCHG action.
8	DES LOC/CPM	O	Select correct value from drop down "V" on right		Dept of Economic Security stipend use
9	STIPEND EXCLUDE	O	Select correct value from drop down "V" on right		

Individual Action (XP52.1) – Selected Items 2 Tab (Pending USERFLDCHG)

(Image 3)



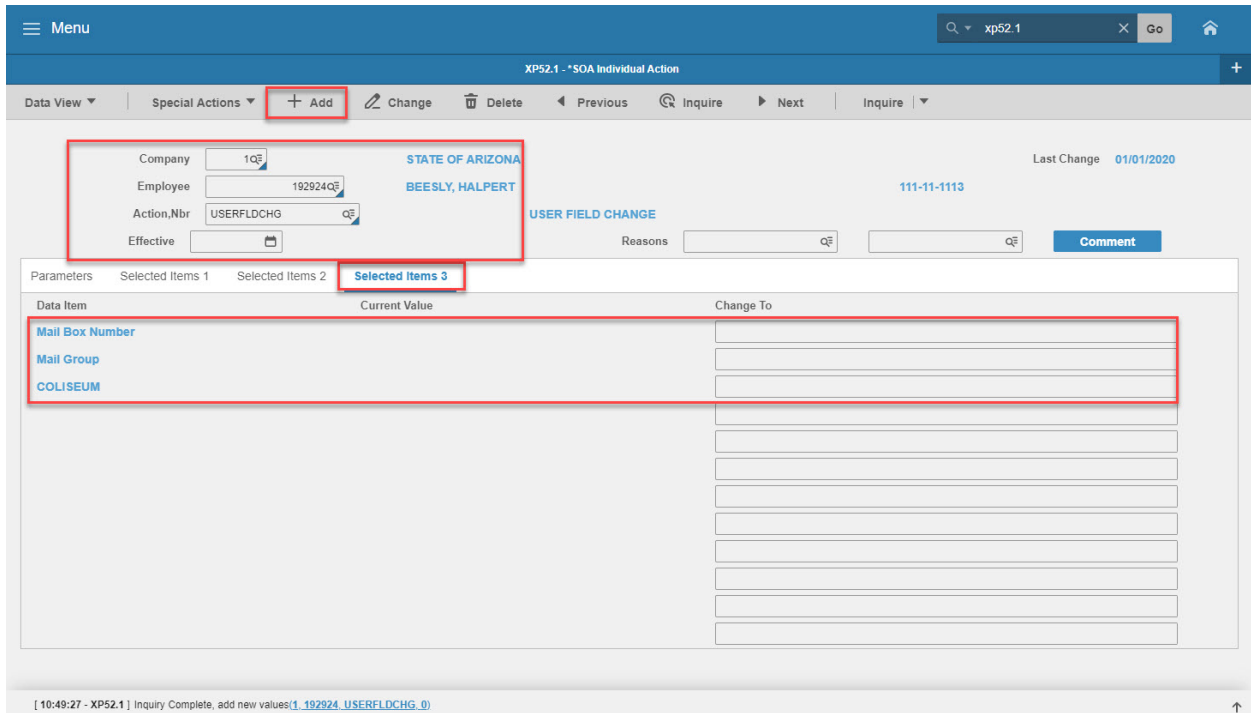
Steps 10-14 of 14

(Image 3, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	MACERTS	O	Select correct value from drop down "V" on right		Dept of Military Affairs use only
11	YES AUTHORIZATION	O	Select correct value from drop down "V" on right		Y/N
12	DES LOCAL OFFC MNGR	O	Select correct value from drop down "V" on right		Dept of Economic Security stipend use
13	ASDB SPREADPAY	O	Select correct value from drop down "V" on right		AZ School for the Deaf & Blind use only
14	ACA DESIGNATION	R	Select correct value from drop down "V" on right		Affordable Care Act designation

Individual Action (XP52.1) – Selected Items 3 Tab (Pending USERFLDCHG)

(Image 4)



The screenshot shows a web-based HRIS interface for an 'Individual Action'. The main form area is titled 'USER FIELD CHANGE' and contains several input fields: 'Company' (STATE OF ARIZONA), 'Employee' (BEESELY, HALPERT), 'Action, Nbr' (USERFLDCHG), and 'Effective' (date field). A 'Selected Items 3' tab is active, displaying a table with the following data:

Data Item	Current Value	Change To
Mail Box Number		
Mail Group		
COLISEUM		

Steps 1-6 of 6

(Image 4, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	Selected Items 3	R	Click on the Selected Items 3 tab.	The Selected Items 3 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 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.		
3	Mail Box Number	O	Free form field for agency use.		This is an optional field that may be useful to some agencies.
4	Mail Group	O	Free form field for agency use.		This is an optional field that may be useful to some agencies.
5	COLISEUM	O	Enter "COLISEUM" if the employee is an AZ		Helps to identify Coliseum workers

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			State Fair / Coliseum worker.		
6	Add button	R	You will see the message “add Complete – Continue” at the bottom right.		Your action has now been processed in a pending status and will update overnight.