HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY

HCM VIEW - VIEW EMPLOYEE INFORMATION
# Table of Contents

**INTRODUCTION** ..................................................................................................................................................... 4

**QUARTERLY PAYMENT INQUIRY FORM (PR50.1)** ................................................................................................... 6
  STEPS 1-7 OF 7............................................................................................................................................................ 6

**US PAYMENT INQUIRY (PR50.2)** .......................................................................................................................... 8
  STEPS 1-5 OF 5............................................................................................................................................................ 8

**PAY STUB INQUIRY FORM (PR51.1)** .................................................................................................................... 10
  STEPS 1-7 OF 7............................................................................................................................................................ 10

**PAYROLL HISTORY – YEAR TO DATE FORM (PR52.1)** ............................................................................................ 12
  STEPS 1-7 OF 7............................................................................................................................................................ 12

**EMPLOYEE ATTENDANCE INQUIRY (TM50.1)** ....................................................................................................... 14
  STEPS 1-9 OF 10.......................................................................................................................................................... 14

**EMPLOYEE ATTENDANCE INQUIRY (TM50.1)** ....................................................................................................... 17
  STEP 10 OF 10 .......................................................................................................................................................... 17

**ATTENDANCE INQUIRY (TM52.1)** ........................................................................................................................ 19
  STEPS 1-9 OF 13.......................................................................................................................................................... 19

**ATTENDANCE INQUIRY (TM52.1)** ........................................................................................................................ 21
  STEPS 10-13 OF 13...................................................................................................................................................... 21

**PLAN BALANCE INQUIRY (TA65.1)** .................................................................................................................... 23
  STEPS 1-5 OF 5............................................................................................................................................................ 23

**EMPLOYEE ACTION SUMMARY FORM (PA66.1)** ................................................................................................ 25
  STEPS 1-7 OF 7............................................................................................................................................................ 25

**ACTION INQUIRY FORM (PA66.2)** ....................................................................................................................... 28
  STEPS 1-9 OF 13.......................................................................................................................................................... 28

**ACTION INQUIRY FORM (PA66.2)** ....................................................................................................................... 31
  STEPS 10-13 OF 13...................................................................................................................................................... 31

**EMPLOYEE ACTION DETAIL FORM (PA66.3)** ...................................................................................................... 33
  STEPS 1-9 OF 9............................................................................................................................................................ 33

**EMPLOYEE ACTION COMMENTS FORM (PA66.4)** ............................................................................................... 35
PAY RATE HISTORY (PA67.1) ........................................................................................................................................ 37
  STEPS 1-8 OF 8......................................................................................................................................................... 37
CURRENT PLAN PARTICIPANTS (BN50.1) ................................................................................................................ 40
  STEPS 1-6 OF 6......................................................................................................................................................... 40
EMPLOYEE BENEFITS SUMMARY (BN51.1) ............................................................................................................. 42
  STEPS 1-6 OF 6......................................................................................................................................................... 42
EMPLOYEE BENEFITS DETAIL (BN51.2) ................................................................................................................ 44
  STEPS 1-9 OF 10....................................................................................................................................................... 44
  Step 10 of 10 .......................................................................................................................................................... 46
  PLAN INQUIRY (BN52.1) ........................................................................................................................................ 47
    STEPS 1-5 OF 5.................................................................................................................................................... 47
SAVINGS BOND HISTORY (BN60.1) .......................................................................................................................... 49
  STEPS 1-8 OF 8......................................................................................................................................................... 49
ADDITIONAL CONTACT NUMBER FORM (HR20.1) ............................................................................................ 51
  STEPS 1-9 OF 12....................................................................................................................................................... 51
  ADDITIONAL CONTACT NUMBER FORM (HR20.1) .......................................................................................... 53
    STEPS 10-12 OF 12.......................................................................................................................................... 53
MILITARY SERVICE FORM (PA14.1) ...................................................................................................................... 54
  STEPS 1-9 OF 17....................................................................................................................................................... 54
MILITARY SERVICE FORM (PA14.1) ...................................................................................................................... 56
  STEPS 10-17 OF 17............................................................................................................................................... 56
COMPANY PROPERTY FORM (PA16.1) .................................................................................................................. 58
  STEPS 1-9 OF 14....................................................................................................................................................... 58
COMPANY PROPERTY FORM (PA16.1) .................................................................................................................. 60
  STEPS 10-14 OF 14..................................................................................................................................................... 61
EDUCATION FORM (PA20.1) ................................................................................................................................. 62
  STEPS 1-9 OF 14....................................................................................................................................................... 62
EDUCATION FORM (PA20.1) ................................................................................................................................. 64
  STEPS 10-14 OF 14..................................................................................................................................................... 64
COMPETENCIES FORM (PA21.1) .......................................................................................................................... 66
  STEPS 1-9 OF 17....................................................................................................................................................... 66
COMPETENCIES FORM (PA21.1) .......................................................................................................................... 68
Introduction

HRIS provides numerous Inquiry Forms that can be used by Agency Personnel to look up/verify Employee information. Access to Inquiry Forms will vary depending on your assigned HRIS Job Role. The following training lesson provides training on all HRIS Inquiry Forms. Below is a list of all HR/PR/BN Inquiry Forms along with a description of what is available on the form:

- Quarterly Payment Inquiry Form (PR50.1) - can be used to view Employee payment information for a specific payroll year and quarter. The form displays gross wages for the quarter, by Employee, along with Federal, Social Security, and Medicare taxable wages.

- Payment Inquiry Form (PR50.2) - can be used to view summary information associated with Employee payment records, such as payment number, payment date, gross earnings, total deductions, and net pay.

- Pay Stub Inquiry Form (PR51.1) - can be used to view payment detail information.

- Pay Stub Inquiry Form - Web (PR51.3) - can be used to view payment detail information in a web format.

- Payroll History - Year to Date Form (PR52.1) - can be used to view an Employee's wages and deductions for the current year or once history has been established for prior years.

- Employee Attendance Inquiry (TM50.1) - can be used to view an Employee's attendance history.
  - Employee Attendance Totals (TM50.2) - can be used to view total attendance information for the parameters selected on TM50.1 (Employee Attendance Inquiry). Form is access off the TM50.1.

- Attendance Inquiry (TM52.1) - can be used to view attendance history information for multiple Employees.

- Plan Balance Inquiry (TA65.1) - can be used to view the available leave balances of an Employee in a specific time accrual plan.

- Yearly Activity Inquiry (TA65.2) - can be used to view individual Employee’s transactions for the current year by plan.

- Employee Transaction Inquiry (TA65.3) - can be used to view all transactions processed for an Employee in a specific time accrual plan.

- Employee Action Summary Form (PA66.1) – can be used to view a summary of the personnel actions performed on an employee.

- Action Inquiry Form (PA66.2) – can be used to view employees who had a particular action performed on them.
• Employee Action Detail Form (PA66.3) – can be used to view the previous and current values of data items changed by an action performed on an employee.

• Employee Action Comments Form (PA66.4) – can be used to view comments about an action performed on an employee.

• Pay Rate History Form (PA67.1) – can be used to view changes made to an employee’s pay rate.

• Current Plan Participants (BN50.1) – can be used to view the employees who are currently enrolled in a benefit plan as of the system date.

• Employee Benefit Summary (BN51.1) – can be used to view the plans in which an employee is enrolled on a particular date.

• Employee Benefit Details (BN51.2) – can be used to view an employee’s annual contributions and, deductions for his/her benefit plan.

• Plan Inquiry (BN52.1) – can be used to view the benefit plans of a company.

• Savings Bond History (BN60.1) – can be used to view the savings bonds an employee has purchased.

• Savings Bond Balance (BN60.2) – can be used to view the balance of a specific savings bond.

**Notes:**

• *Inquiry forms cannot be used to update Employee data.*

• *Depending on your security, you may or may not have access to all the forms discussed in this training. If you are unsure what forms you have access to use please see the HRIS Job Role Descriptions.*
# Quarterly Payment Inquiry Form (PR50.1)

**Steps 1-7 of 7**

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PR50.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The US Quarterly Payment Inquiry (PR50.1) form will open.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Payroll Year Field</td>
<td>O</td>
<td>Type in the Payroll Year to view.</td>
<td>If no Payroll year is provided, the system will default in a payroll year.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Quarter Field</td>
<td>O</td>
<td>If applicable, type in the specific quarter to view.</td>
<td>If no Quarter is provided, the system will show the total for the entire payroll year.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get PageDown and PageUp</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>--------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>message &quot;Inquiry Complete&quot; in the lower left corner. The system will populate the information at the bottom of the screen for all employees the user has access to view.</td>
<td>can be used to see additional employees.</td>
</tr>
<tr>
<td>6</td>
<td><strong>Information area</strong></td>
<td>N/A</td>
<td>This area of the form will display Payment information for all employees the user has access to view.</td>
<td>Information that will be displayed includes: EIN, Name, Gross Pay, Name, Federal Taxable, Soc Sec Taxable and Medicare Taxable wages. If access is allowed, the user will also see SSN.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>More link</strong></td>
<td>O</td>
<td>Click on the More link for the applicable employee to see additional tax information on State Taxes.</td>
<td>The State and Local Taxable Wages (PR50.4) form will open. State taxes will be displayed for the specific employee. To leave this form and return to PR50.1, click Cancel.</td>
<td></td>
</tr>
</tbody>
</table>
US Payment Inquiry (PR50.2)

Steps 1-5 of 5

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type PR50.2 in the White Search Box. Press Enter on the keyboard</td>
<td>The Payment Inquiry Form (PR50.2) will open.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type in the EIN of the employee’s record to be displayed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message “Inquiry Complete” in the lower left corner.</td>
<td>PageDown and PageUp can be used to see additional employees.</td>
</tr>
<tr>
<td>5</td>
<td>Information area</td>
<td>N/A</td>
<td>This area of the form will display Payment</td>
<td>Information that will be displayed includes: Date, Payment Number, Type, etc.</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>information for the specific employee.</td>
<td>Gross Pay, Total Deductions, and Net Pay.</td>
<td></td>
</tr>
</tbody>
</table>
## Pay Stub Inquiry Form (PR51.1)

### Steps 1-7 of 7

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R)</th>
<th>Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td></td>
<td>Type <strong>PR51.1</strong> in the White Search Box. Press <strong>Enter</strong> on the keyboard</td>
<td>The Pay Stub Inquiry Form (PR51.1) will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td></td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td></td>
<td>Type in the EIN of the employee’s record to be displayed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Payment Date</td>
<td>R</td>
<td></td>
<td>Type or select from the drop down menu the specific payments date to be viewed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
<td></td>
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<td>----------------------------------------------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If Payment date is not known, skip this step. The Next button can be used to find the next payment.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Payment Number Field</td>
<td>R</td>
<td>Type or select from the drop down menu the payment number to be viewed.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If Payment Number is not known, skip this step. The Inquiry button will bring up the payment number using the payment date.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Inquire Button</td>
<td>R</td>
<td>If the Payment Date or Payment Number is provided, click Inquire.</td>
<td>You should get message &quot;Select More...to view remaining deductions&quot; in the lower left corner.</td>
<td>If you attempt to click Inquire without a Payment Date and Payment Number, this system will notify you that both fields are required.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Next Button</td>
<td></td>
<td>If the Payment Date and/or Payment Number is unknown, click Next to bring up the next record for the Employee.</td>
<td>The system will populate the information at the bottom of the screen for the specific employee requested.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Earning and Deductions Tabs</td>
<td>N / A</td>
<td>This area of the form will display Payment information for the specific employee.</td>
<td>Information that will be displayed includes: Earnings by Paycode (Hours and Amount), Deductions (both Employee and Employer).</td>
<td>The More tab may appear, click on this to view more deductions.</td>
<td></td>
</tr>
</tbody>
</table>
### Payroll History – Year to Date Form (PR52.1)

#### Steps 1-7 of 7

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type PR51.1 in the White Search Box. Press Enter on the keyboard</td>
<td>The Pay Stub Inquiry Form (PR51.1) will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type in the EIN of the employee’s record to be displayed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Payroll Year</td>
<td>R</td>
<td>Type in the Payroll year to view.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Country Code</td>
<td>O</td>
<td>Type or select from the drop down the country code for</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
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<td>---------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>6</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>7</td>
<td>Wages &amp; Deductions Tabs</td>
<td>N / A</td>
<td>This area of the form will display Payroll history information for the specific employee.</td>
<td>Information that will be displayed includes: Pay Summary Group, Pay Description, Hours and Wages. In addition, Total hours and wages for the Year will be displayed. Deduction, Deduction Description, amount, Taxable wages, Totals for the Year</td>
<td></td>
</tr>
</tbody>
</table>
Employee Attendance Inquiry (TM50.1)

Steps 1-9 of 10

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>TM50.1</strong> in the White Search Box. Press <em>Enter</em> on the keyboard</td>
<td>The Employee Attendance Inquiry (TM50.1) Form will open.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type in the EIN of the employee’s record to be displayed.</td>
<td></td>
<td>Valid Value are: ‘1’ – Date ‘2’ – Attend Code; Date</td>
</tr>
<tr>
<td>4</td>
<td>Sort Option Field</td>
<td>O</td>
<td>Type or select from the drop down whether or not you want the</td>
<td></td>
<td>Default value is ‘1’.</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------</td>
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<td>----------------------------------------------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>information to list according to dates or attendance code and then dates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>To display all attendance history, skip to step 9 for Inquire.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Dates Field – Box 1</td>
<td>O</td>
<td>If you would like to display the attendance history for a specific range of dates, type or select from the drop down the beginning date of that range.</td>
<td>If you type only a beginning date, employee attendance history on or after that date will appear.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If a date range is not required, skip this step.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dates Field – Box 2</td>
<td>O</td>
<td>If you would like to display the attendance history for a specific range of dates, type or select from the drop down the ending date of that range.</td>
<td>If you type only an ending date, employee attendance history on or before that date will appear.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If a date range is not required, skip this step.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Search Date Field</td>
<td>O</td>
<td>If you would like to view employee history for a particular day of the week, type or select that day from the drop down.</td>
<td>Valid Values are: ‘1’ – Sunday ‘2’ – Monday ‘3’ – Tuesday ‘4’ – Wednesday ‘5’ – Thursday ‘6’ – Friday ‘7’ – Saturday</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Attend Class Field</td>
<td>O</td>
<td>Skip this field, at this time; HRIS does not use attendance classes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>--------------</td>
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<td>-----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>8</td>
<td><strong>Attend Code Field</strong></td>
<td>O</td>
<td>If attendance history for a specific attendance code is desired, select the Attend Code.</td>
<td></td>
<td>Attendance Codes are used to define the reason for the Employee’s leave (FMLA, Family Sick, etc. and defines the dependent, if applicable).</td>
</tr>
<tr>
<td>9</td>
<td><strong>Inquire Button</strong></td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td>Results will be viewed on the results link.</td>
</tr>
</tbody>
</table>
## Employee Attendance Inquiry (TM50.1)

![Employee Attendance Inquiry (TM50.1) Screen Shot](image)

### Step 10 of 10

(Image 5, Table 2)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Related Pages Results</td>
<td>O</td>
<td>Click on the Results link under related pages to see the results of this inquiry.</td>
<td>See Screen shot below for example.</td>
<td></td>
</tr>
</tbody>
</table>
### Results of Employee Attendance Inquiry (TM50.1) – Image

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Totals Field</strong></td>
<td>O</td>
<td>Click on the Totals field</td>
<td>System will open the Employee Attendance Totals (TM50.2) form displaying the total for the attendance codes displayed.</td>
<td></td>
</tr>
</tbody>
</table>
### Attendance Inquiry (TM52.1)

#### Steps 1-9 of 13

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>TM52.1</strong> in the White Search Box. Press Enter on the keyboard.</td>
<td>The Attendance Inquiry (TM52.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Sort Option Field</td>
<td>O</td>
<td>Type or select from the drop down whether or not you want the information to list using a specific sort option.</td>
<td>Valid Value are: ‘1’ – Employee; Date ‘2’ – Employee; Attend Code ‘3’ – Attend Code; Date ‘4’ – Date; Attend Code</td>
<td>Default value is ‘1’.</td>
</tr>
<tr>
<td>4</td>
<td>Dates Field – Box 1</td>
<td>O</td>
<td>If you want</td>
<td>If only a beginning date is</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>-----------------</td>
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<td>-------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>attendance information to display for a specified date range, type in the beginning date.</td>
<td>To display all dates, skip this field.</td>
<td>provided, attendance history will appear on or after the date you type.</td>
</tr>
<tr>
<td></td>
<td>Dates Field – Box 2</td>
<td>O</td>
<td>If you want attendance information to display for a specified date range, type in the beginning date.</td>
<td>To display all dates, skip this field.</td>
<td>If only an ending date is provided, attendance history will appear as on or before the date you type.</td>
</tr>
<tr>
<td>5</td>
<td>Search Day Field</td>
<td>O</td>
<td>If you want to view attendance information for a specific day of the week, select that day here.</td>
<td>To display all days, skip this field.</td>
<td>Valid Values are: ‘1’ – Sunday ‘2’ – Monday ‘3’ – Tuesday ‘4’ – Wednesday ‘5’ – Thursday ‘6’ – Friday ‘7’ – Saturday</td>
</tr>
<tr>
<td>6</td>
<td>Attend Class Field</td>
<td>O</td>
<td>Skip this field, at this time; HRIS does not use attendance classes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Attend Code Field</td>
<td>O</td>
<td>If attendance history for a specific attendance code is desired, select the Attend Code.</td>
<td></td>
<td>Attendance Codes are used to define the reason for the Employee’s leave (FMLA, Family sick, etc. and defines the dependent, if applicable).</td>
</tr>
<tr>
<td>8</td>
<td>Process Level Field</td>
<td>O</td>
<td>If you want to display attendance information for employees within a specified process level, type or select the process level from the drop down menu.</td>
<td></td>
<td>If no process level is entered, user will see all employees he/she has access to view that have attendance history.</td>
</tr>
<tr>
<td>9</td>
<td>Department Field</td>
<td>O</td>
<td>If you want to display attendance information for</td>
<td></td>
<td>If no department is entered, user will see all employees he/she</td>
</tr>
</tbody>
</table>
### Attendance Inquiry (TM52.1)

**Steps 10-13 of 13**

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Supervisor Field</td>
<td>O</td>
<td>If you want to display attendance information for employees reporting to a specific supervisor, type or select the supervisor code from the drop down.</td>
<td>If no supervisor is entered, user will see all employees for all supervisors he/she has access to view that have attendance history.</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>----------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>11</td>
<td>Employee Field</td>
<td>O</td>
<td>If you want to display attendance history for a specific employee, type or select the employee number from the drop down menu.</td>
<td>If you select an employee, leave the Process Level, Department and Supervisor fields blank.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td>Results will be viewed on the results link.</td>
</tr>
<tr>
<td>13</td>
<td>Related Pages</td>
<td>O</td>
<td>Click on the Results link under related pages to see the results of this inquiry.</td>
<td></td>
<td>See Screen shot below for example.</td>
</tr>
</tbody>
</table>

Results of Attendance Inquiry (TM52.1) – Image

(Image 7)

<table>
<thead>
<tr>
<th>Attendance</th>
<th>Date</th>
<th>Day</th>
<th>Employee</th>
<th>Name</th>
<th>Hours</th>
<th>Ocr</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS</td>
<td>06/14/2019</td>
<td>Fri</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/13/2019</td>
<td>Thu</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/12/2019</td>
<td>Wed</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/11/2019</td>
<td>Tue</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/10/2019</td>
<td>Mon</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/09/2019</td>
<td>Fri</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/08/2019</td>
<td>Thu</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/07/2019</td>
<td>Wed</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/04/2019</td>
<td>Tue</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FS</td>
<td>06/03/2019</td>
<td>Mon</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
<tr>
<td>FM</td>
<td>12/02/2010</td>
<td>Thu</td>
<td></td>
<td></td>
<td>8.00</td>
<td>Y</td>
</tr>
</tbody>
</table>
Plan Balance Inquiry (TA65.1)

Steps 1-5 of 5

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type TA65.1 in the White Search Box. Press Enter on the keyboard.</td>
<td>The Plan Balance Inquiry (TA65.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Plan Field</td>
<td>R</td>
<td>Type or select from the drop down menu the specific time accrual plan to view.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
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<td>---------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>lower left corner.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The Employees enrolled the specified plan will appear on the bottom of the form.</td>
</tr>
<tr>
<td>5</td>
<td>Information area</td>
<td>N/ A</td>
<td>This area of the form will display time accrual information for the employees enrolled in the specified plan.</td>
<td>Information that will be displayed includes: EIN, Last Name, First Name, Middle Initial and the Eligible Hours.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The State of Arizona does not use accrued hours; therefore the accrual hour’s field will be blank.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>You can use PageDown, PageUp or the Position To field to see additional employees.</td>
</tr>
</tbody>
</table>
## Employee Action Summary Form (PA66.1)

(Internal Use Only - July 15, 2019)

### Steps 1-7 of 7

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PA66.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The Employee Action Summary (PA66.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Effective Field – Box 1</td>
<td>O</td>
<td>If applicable, type or select a specific range of dates to display employee actions. This field should indicate the beginning date of the range.</td>
<td>If you type only a beginning date, actions with effective dates on or after the effective date in this field will display.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Effective Field – Box 2</td>
<td>O</td>
<td>If applicable, type or select a specific ending date for the employee actions.</td>
<td>If you type only an ending date, all actions will appear on or before that date. If no date range is required, skip these fields to see all actions for the employee.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>History Errors Field</td>
<td>O</td>
<td>Type or select from the drop down menu the option that indicates whether you want to exclude, include or display errors only.</td>
<td>History errors are created when incorrect information is saved and later updated. Although the information is correct, the history file or error history file may contain a log of the error. Valid Values are: ‘1’ – Exclude Errors ‘2’ – Include Errors ‘3’ – Errors Only The default value is 1.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner. The Employee action history will display for the criteria as provided.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Information area</td>
<td>N/ A</td>
<td>This area of the form will display personnel action history for the specified employee.</td>
<td>Information that will be displayed includes: Action Nbr, Description, Position level, Effective Date, End Date (if applicable), Change Date, and Comments (if applicable).</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>---------------</td>
<td>------------------</td>
<td>---------------------------------</td>
</tr>
</tbody>
</table>

You can use PageDown, PageUp or the Position To field to see additional information.
Action Inquiry Form (PA66.2)

Steps 1-9 of 13

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type PA66.2 in the White Search Box. Press Enter on the keyboard.</td>
<td>The Action Inquiry (PA66.2) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Action Field</td>
<td>R</td>
<td>Type or select from the drop down menu the Action Nbr to lookup in the inquiry.</td>
<td>If selecting the action from the drop down menu, verify that you have selected from Action Code (not Historical Actions) under the Search</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>----------------------------</td>
<td>---------------------------</td>
<td>----------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>History Errors Field</td>
<td>O</td>
<td>Type or select from the drop down menu the option that indicates whether you want to exclude, include or display errors only.</td>
<td>History errors are created when incorrect information is saved and later updated. Although the information is correct, the history file or error history file may contain a log of the error. Valid Values are: ‘1’ – Exclude Errors ‘2’ – Include Errors ‘3’ – Errors Only The default value is 1.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Effective Field – Box 1</td>
<td>O</td>
<td>If applicable, type or select a specific range of dates to display for the actions. This field should indicate the beginning date of the range.</td>
<td>If you type only a beginning date, actions with effective dates on or after the effective date in this field will display.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Effective Field – Box 2</td>
<td>O</td>
<td>If applicable, type or select a specific ending date for the employee actions.</td>
<td>If you type only an ending date, all actions will appear on or before that date. If no date range is required, skip these fields to see all actions for the employee.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Process Level Field</td>
<td>O</td>
<td>If you want to display action information for employees within a specified process level, type or select the process level from the drop down menu.</td>
<td>If no process level is entered, user will see all employees he/she has access to view that have that specific action.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Department Field</td>
<td>O</td>
<td>If you want to display action information for employees within a specified department, type or select the</td>
<td>If no department is entered, user will see all employees he/she has access to view that have that specific action.</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R)</td>
<td>Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
</tr>
<tr>
<td>-----</td>
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<td>---------------</td>
<td>-----------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(R) Optional</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>User Level</td>
<td>O</td>
<td></td>
<td>If you want to display action information for employees within a specific user level, type or select the user level from the drop down menu.</td>
<td>If no user level is entered, user will see all employees he/she has access to view that have that specific action.</td>
</tr>
<tr>
<td>9</td>
<td>Location</td>
<td>O</td>
<td></td>
<td>If you want to display action information for employees within a specific location, type or select the location from the drop down menu.</td>
<td>If no location is entered, user will see all employees he/she has access to view that have that specific action.</td>
</tr>
</tbody>
</table>
Action Inquiry Form (PA66.2)

Steps 10-13 of 13

(Image 10, Table 2)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Supervisor Field</td>
<td>O</td>
<td>If you want to display action information for employees reporting to a specific supervisor, type or select the supervisor code from the drop down menu.</td>
<td>If no supervisor is entered, user will see all employees for all supervisors he/she has access to view that have that specific action.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Employee Group</td>
<td>O</td>
<td>If you want to display action information for</td>
<td>If no employee group is entered, user will see all employees for all groups</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>12</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner. The Action history will display for the criteria as provided.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Information area</td>
<td>N/A</td>
<td>This area of the form will display personnel action history for the specified employee.</td>
<td>Information that will be displayed includes: EIN, Name, Position Level, Effective Date and Comments (if applicable). You can use PageDown, PageUp or the Position To field to see additional information.</td>
<td></td>
</tr>
</tbody>
</table>
## Employee Action Detail Form (PA66.3)

### Steps 1-9 of 9

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type PA66.3 in the White Search Box. Press Enter on the keyboard</td>
<td>The Employee Action Detail (PA66.3) form will open.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Effective Field</td>
<td>R</td>
<td>Type or select the effective date of the action</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>-----------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5</td>
<td>Action, Nbr Field</td>
<td>R</td>
<td></td>
<td>Type or select from the drop down menu the Action Nbr to lookup in the inquiry.</td>
<td>If selecting the action from the drop down menu, verify that you have selected from Action Code (not Historical Actions) under the Search Options on the left pane.</td>
</tr>
<tr>
<td>6</td>
<td>History Errors Field</td>
<td>O</td>
<td></td>
<td>Type or select from the drop down menu the option that indicates whether you want to exclude, include or display errors only.</td>
<td>History errors are created when incorrect information is saved and later updated. Although the information is correct, the history file or error history file may contain a log of the error. Valid Values are: ‘1’ – Exclude Errors ‘2’ – Include Errors ‘3’ – Errors Only The default value is 1.</td>
</tr>
<tr>
<td>7</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td>The Employee Action history will display for the criteria as provided.</td>
</tr>
<tr>
<td>8</td>
<td>Position Level Field</td>
<td>N/A</td>
<td></td>
<td>The position level and reason codes associated with this action will be displayed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reason(s) Field</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Information area</td>
<td>N/A</td>
<td></td>
<td>This area of the form will display personnel action history for the specified employee.</td>
<td>Information that will be displayed includes: Data Item, Old Value, New Value, Currency (if applicable) and whether the value is still the Current Value. You can use PageDown, or PageUp to see additional information.</td>
</tr>
</tbody>
</table>
### Employee Action Comments Form (PA66.4)

#### Steps 1-8 of 8

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PA66.4</strong> in the White Search Box. Press <strong>Enter</strong> on the keyboard</td>
<td>The Employee Action Comments (PA66.4) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Action Field</td>
<td>R</td>
<td>Type or select from the drop down menu the Action Nbr to lookup in the inquiry.</td>
<td></td>
<td>If selecting the action from the drop down menu, verify that you have selected from Action Code (not Historical Actions) under the Search Options on the left pane.</td>
</tr>
<tr>
<td>4</td>
<td>Effective Field</td>
<td>R</td>
<td>Type or select the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>------------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5</td>
<td><strong>Employee Field</strong></td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td>effective date of the action to review.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td><strong>Inquire Button</strong></td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner. The Employee Action Comments will display for the criteria as provided.</td>
<td>If no comments where entered, the message “No More Records For Given Key” will appear in the lower left corner.</td>
</tr>
<tr>
<td>7</td>
<td><strong>Position Level Field</strong></td>
<td>N / A</td>
<td>If applicable, the position level and reason codes associated with this action will be displayed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td><strong>Information area</strong></td>
<td>N / A</td>
<td>This area of the form will display personnel action comments for the specified employee action.</td>
<td>Information that will be displayed includes: Comment information. You can use PageDown, or PageUp to see additional information.</td>
<td></td>
</tr>
</tbody>
</table>
Pay Rate History (PA67.1)

Steps 1-8 of 8

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PA67.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The Pay Rate History (PA67.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Through Date</td>
<td>O</td>
<td>Type a date through which to display the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>----------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5</td>
<td>History Errors Field</td>
<td>O</td>
<td>Type or select from the drop down menu the option that indicates whether you want to exclude, include or display errors only.</td>
<td>History errors are created when incorrect information is saved and later updated. Although the information is correct, the history file or error history file may contain a log of the error. Valid Values are: ‘1’ – Exclude Errors ‘2’ – Include Errors ‘3’ – Errors Only</td>
<td>The default value is 1.</td>
</tr>
<tr>
<td>6</td>
<td>Position Level Field</td>
<td>O</td>
<td>Type or select from the drop down menu the position level to display the pay rate changes.</td>
<td>Valid Values are: ‘1’ – Level 1 ‘2’ – Level 2 ‘3’ – Level 3 ‘4’ – Level 4 ‘5’ – Level 5 The default value is 1.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner. The Employee Pay Rate History will display for the criteria as provided. If no comments where entered, the message “No More Records For Given Key” will appear in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Information area</td>
<td>N / A</td>
<td>This area of the form will display pay rate history for the specified employee.</td>
<td>Information that will be displayed includes: Effective date of change, Rate, Annual Salary, Percent Change, Currency and Action were it was processed. In additional the More tab displays the Reason Code, FTE and Annual Hours. The Base Tab shows the current Base Pay Rate and Currency.</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>You can use Previous, or Next to see more employees. You can use PageDown, or PageUp to see additional information.</td>
</tr>
</tbody>
</table>
Current Plan Participants (BN50.1)

Steps 1-6 of 6

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type BN50.1 in the White Search Box. Press Enter on the keyboard</td>
<td>The Current Plan Participants (BN50.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Benefit Type Field</td>
<td>R</td>
<td>Type or select from the drop down menu the benefit plan for which you want to display current participants.</td>
<td></td>
<td>Valid Values are: 'DB' – Defined Benefit 'DC' – Defined Contribution 'DI' – Disability 'DL' – Dependent Life/AD&amp;D</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Plan Field</td>
<td>R</td>
<td>Type or select from the drop down menu the plan for which you want to display current participants.</td>
<td></td>
<td>Valid values will vary depending on the Benefit Type selected above.</td>
</tr>
<tr>
<td>5</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner. You may also get message “More Records Exist – Use PageDown”, this indicates that multiple pages of records are available.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Information area</td>
<td>N/A</td>
<td>This area of the form will display benefit plan participants for the selected plan.</td>
<td></td>
<td>Information that will be displayed includes: Employee EIN, Name and Start date for plan. Stop date will appear as applicable. You can use PageDown, PageUp or Position To to see additional information.</td>
</tr>
</tbody>
</table>
Employee Benefits Summary (BN51.1)

Steps 1-6 of 6

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type BN51.1 in the White Search Box. Press Enter on the keyboard.</td>
<td>The Employee Benefit Summary (BN51.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>As of Date Field</td>
<td>O</td>
<td>Type the date for which you want to display the employee’s benefits.</td>
<td>If you leave this field blank, the system date will default.</td>
<td>BN51.1 displays all benefits with a start date less than and a stop date greater than or equal to this date.</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>---------------------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Employee Field</td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td>You may also get message “More Records Exist – Use PageDown”, this indicates that multiple pages of records are available.</td>
</tr>
<tr>
<td>6</td>
<td>Information area</td>
<td>N/A</td>
<td>This area of the form will display employee benefit summary for the defined date.</td>
<td>Information that will be displayed includes: Plan Type, Plan Code, Plan Description, Start Date, Stop Date (if applicable), Employee Election (if applicable), and Nbr (indicates family, single, etc). You can use PageDown, or PageUp to see additional information.</td>
<td></td>
</tr>
</tbody>
</table>
Employee Benefits Detail (BN51.2)

Steps 1-9 of 10
(Image 15, Table 1)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R)</th>
<th>Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td></td>
<td>Type BN51.2 in the White Search Box. Press Enter on the keyboard</td>
<td>The Employee Benefit Detail (BN51.2) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td></td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td></td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>--------------------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Benefit Type Field</td>
<td>R</td>
<td>Type or select from the drop down menu the benefit plan for which you want to display employee benefit detail.</td>
<td></td>
<td>Valid Values are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘HL’ – Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘DN’ – Dental</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘DI’ – Disability</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘EL’ – Employee Life/AD&amp;D</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘DL’ – Dependent Life/AD&amp;D</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘DC’ – Defined Contribution</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘DB’ – Defined Benefit</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘VA’ – Vacation Buy/Sell</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘RS’ – Spending Account</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘SB’ – Savings Bond</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>‘SP’ – Stock Purchase</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Plan Field</td>
<td>R</td>
<td>Type or select from the drop down menu the plan for which you want to display employee benefit detail.</td>
<td></td>
<td>Valid values will vary depending on the Benefit Type selected above.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Start Date</td>
<td>R</td>
<td>Type the start date of the benefit for the employee.</td>
<td></td>
<td>If you do not know the start date, use the Next button to scroll through the employee’s benefits or use the Drill Around feature to find the start date.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Stop Date Field</td>
<td>N/A</td>
<td>Depending on the plan being displayed, this information will vary. Fields will appear as applicable to that plan.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Emp Election Nbr Field</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Annual Contributions area</td>
<td>N/A</td>
<td>Depending on the plan being displayed, this information will vary. Fields will appear as applicable to that plan.</td>
<td></td>
<td>“Amounts” may be displayed as a percentage.</td>
<td></td>
</tr>
</tbody>
</table>
### Employee Benefits Detail (BN51.2)

#### Step 10 of 10

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Deductions area</td>
<td>N / A</td>
<td>Depending on the plan being displayed, this information will vary. Fields will appear as applicable to that plan.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Plan Inquiry (BN52.1)

**Steps 1-5 of 5**

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>BN52.1</strong> in the White Search Box. Press <strong>Enter</strong> on the keyboard.</td>
<td>The Plan Inquiry (BN52.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Benefit Type Field</td>
<td>R</td>
<td>Type or select from the drop down menu the benefit plan for which you want to display employee benefit detail.</td>
<td></td>
<td>Valid Values are: 'HL' – Health 'DN' – Dental 'DI' – Disability 'EL' – Employee Life/AD&amp;D 'DL' – Dependent Life/AD&amp;D 'DC' – Defined</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>----------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td>Contribution 'DB' – Defined Benefit 'VA' – Vacation Buy/Sell 'RS' – Spending Account 'SB' – Savings Bond 'SP' – Stock Purchase</td>
</tr>
<tr>
<td>5</td>
<td>Information area</td>
<td>N/A</td>
<td></td>
<td>Information that will be displayed includes: Plan Type, Plan Code, Description, Start Date and Stop Date for plans that have ended. You can use PageDown, or PageUp to see additional information.</td>
<td>This area of the form will display plan information as applicable for the State of Arizona.</td>
</tr>
</tbody>
</table>
## Savings Bond History (BN60.1)

Steps 1-8 of 8

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>BN60.1</strong> in the White Search Box. Press Enter on the keyboard.</td>
<td>The Savings Bond History (BN60.1) form will open.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Type 1 in Company field.</td>
<td>System will access information for Company 1.</td>
<td>All forms/actions must contain a 1 in the Company Field.</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type or select from the drop down menu the employee number for the record to review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Plan Field</td>
<td>R</td>
<td>Type or select from the drop down menu the type of</td>
<td>Valid Values are: 'S100' – Savings Bond $100, 'S200' – Savings Bond $200</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>--------------------------</td>
<td>---------------</td>
<td>-----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>5</td>
<td><strong>Start Date Field</strong></td>
<td>R</td>
<td>Type or select from the drop down the start date for the specific savings bond.</td>
<td>‘$500’ – Savings Bond $500</td>
<td>If the Start Date is unknown, you can enter the other two fields and click the Next button.</td>
</tr>
<tr>
<td>6</td>
<td><strong>Inquire Button</strong></td>
<td>R</td>
<td>Click Inquire</td>
<td>You should get message &quot;Inquiry Complete&quot; in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Information area</strong></td>
<td>N / N/A</td>
<td>This area of the form will display the savings bond information for the specific bond selected.</td>
<td>Information that will be displayed includes: Bond Number, Owner, Co-Owner (if applicable) and purchase date. You can use PageDown, or PageUp to see additional information.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td><strong>Totals button</strong></td>
<td>O</td>
<td>Click on the totals button to see the details of the specific savings bond.</td>
<td>The Savings Bond Balance (BN60.2) form will open.</td>
<td>Information includes: Employee Number, Plan, Start Date, Contribution, Cost, Number Purchased and Account Balance.</td>
</tr>
</tbody>
</table>
## Additional Contact Number Form (HR20.1)

![Image](image18)

Steps 1-9 of 12

(Image 18, Table 1)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type HR20.1 in the White Search Box. Press Enter on the keyboard</td>
<td>The Additional Contacts Form (HR20.1) will open.</td>
<td>The Additional Contacts Form (HR20.1) can be used to track additional contact information for an Employee, including Home Phone, Cell Phone, Pager, etc.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Field should default to Company ‘1’. If field is not Company ‘1’, Type or Select ‘1’.</td>
<td>Company should always be ‘1’</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type the Employee’s EIN.</td>
<td>System will display the Employees name at the end</td>
<td>You must enter the correct EIN.</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>--------------------------</td>
<td>---------------</td>
<td>------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>HRIS will access needed information for the EIN. If Employee has Contacts, they will appear on the form and the message “Inquiry Complete” will appear in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>FC Field</td>
<td>R</td>
<td>Type ‘A’ in the FC field to add a new additional contact. Type ‘C’ in the FC field to change an existing additional contact. Type ‘D’ in the FC field to delete an existing additional contact.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Begin Field</td>
<td>O</td>
<td>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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>End Field</td>
<td>O</td>
<td>Type the end date for the additional contact if you have it. Format: MMDDYY.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Type Field</td>
<td>O</td>
<td>Type or Select from the drop down the type of contact. Example Cell PH, Pager, MSG Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ctry Field</td>
<td>O</td>
<td>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.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Additional Contact Number Form (HR20.1)

Steps 10-12 of 12

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Number Field</td>
<td>O</td>
<td>Type the Contact number or email address in this field whichever is applicable.</td>
<td></td>
<td>Number Format: 999.999.9999, Email Format: ALL CAPS – Example: <a href="mailto:JOHNDoe@AZ.Gov">JOHNDoe@AZ.Gov</a></td>
</tr>
<tr>
<td>11</td>
<td>Ext Field</td>
<td>O</td>
<td>Type the Contact Extension if applicable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Change Button</td>
<td>R</td>
<td>Click Change to Add, Change or Delete an additional contact.</td>
<td>There will be a message in the lower left corner “Change Complete - Continue”.</td>
<td>Action is processed and saved.</td>
</tr>
</tbody>
</table>
### Military Service Form (PA14.1)

#### Steps 1-9 of 17

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R)</th>
<th>Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td></td>
<td>Type <strong>PA14.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The Military Service Form (PA14.1) will open.</td>
<td>The Military Service Form can be used to track employee military status, including current or prior service.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td></td>
<td>Field should default to Company ‘1’. If field is not Company ‘1’, Type or</td>
<td></td>
<td>Company should always be ‘1’</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Select ‘1’.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td></td>
<td>Type the Employee’s EIN.</td>
<td>System will display the Employees name at the end of the field after advancing</td>
<td>You must enter the correct EIN.</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>--------------</td>
<td>----------------------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>HRIS will access needed information for the EIN</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Message “Inquiry Complete” will appear in the lower left corner.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Veteran Field</td>
<td>O</td>
<td>Type or Select from the drop down menu the Veteran Status of the Employee</td>
<td>Valid Values are: N – No</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Y – Veteran D – Veteran With Disabled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Draft Status Field</td>
<td>O</td>
<td>Leave this field BLANK.</td>
<td>Field is not used by the State of Arizona.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Rank Attained Field</td>
<td>O</td>
<td>Type the highest rank attained by the Employee, if available.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Active Field</td>
<td>O</td>
<td>Type or Select from the drop down if the Employee is still Active in the National Guard or Reserves, if available.</td>
<td>Valid Values are: NG – National Guard RE – Reserves</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>FC Field</td>
<td>R</td>
<td>Type ‘A’ in the FC field to add a new military service.</td>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Type ‘C’ in the FC field to change an</td>
<td>If ‘D’ is selected and no other changes are required, skip to step</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Military Service Form (PA14.1)

![Military Service Form (PA14.1)](image)

### Steps 10-17 of 17

(Image 20, Table 2)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Branch Field</td>
<td>O</td>
<td>Type the Branch of Service the Employee is/was in, if available.</td>
<td>Example – AF for Air Force, MA for Marines.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Specialty Field</td>
<td>O</td>
<td>Type the Employee’s service specialty, if available.</td>
<td>Example – Tank Driver, Linguist</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Rank Field</td>
<td>O</td>
<td>Type the Employee’s current rank, if available.</td>
<td>Example – Master Sergeant, Lieutenant.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Service Years</td>
<td>O</td>
<td>Type the number of years the Employee served, if available.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>--------------------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>14</td>
<td>Service Months Field</td>
<td>O</td>
<td>Type the number of months the Employee served, if available.</td>
<td></td>
<td>Valid Values are 01 – 11. Example – If Employee served 4 years, 5 months you would enter the following: Serv Yrs Field = 4, Mths Field = 5.</td>
</tr>
<tr>
<td>15</td>
<td>Discharge Date Field</td>
<td>O</td>
<td>Type or Select from the drop down the date of the Employee’s discharge, if available.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Type Field</td>
<td>O</td>
<td>Type or Select the type of discharge for the Employee, if available.</td>
<td></td>
<td>Valid Values are: D = Dishonorable H = Honorable L = Less Honorable M = Medical O = Other</td>
</tr>
<tr>
<td>17</td>
<td>Add/Change Buttons</td>
<td>R</td>
<td>Click ‘Add’ to Add a new record, or if this is the first record being added.</td>
<td>If Add was clicked, there will be a message in the lower left corner “Add Complete – Continue”.</td>
<td>Action is processed and saved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Click ‘Change’ if updating a recording, or adding a record to information that previously existed.</td>
<td>If Change was clicked there will be a message in the lower left corner “Change Complete - Continue”.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Click ‘Change’ if deleting a record that existed.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Company Property Form (PA16.1)

**Steps 1-9 of 14**  
(Image 21, Table 1)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type PA16.1 in the White Search Box. Press Enter on the keyboard.</td>
<td>The Company Property Form (PA16.1) will open.</td>
<td>The Company Property Form can be used to track any type of company property issued to an employee.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Field should default to Company ‘1’. If field is not Company ‘1’, Type or Select ‘1’.</td>
<td></td>
<td>Company should always be ‘1’</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type the employee’s EIN.</td>
<td>System will display the employees name at the end</td>
<td>You must enter the correct EIN.</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
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<td>----------</td>
<td>---------------</td>
<td>-----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(R) Optional (O)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>HRIS will access needed information for the EIN. Message “No More Records to View” will appear in the lower left corner. If employee has company property, their information will appear on the form and the message “Inquiry Complete” will appear in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>FC field</td>
<td>R</td>
<td>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 existing company property.</td>
<td></td>
<td>Notes: If ‘D’ is selected and no other changes are required, skip to step 13 (Page 16)</td>
</tr>
<tr>
<td>6</td>
<td>Property Field</td>
<td>R</td>
<td>Type or Select from the drop down menu the company property that will be issued to the employee.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Issued Field</td>
<td>R</td>
<td>Type the date of issue of the company property</td>
<td>Format: MMDDYY</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Expected Field</td>
<td>O</td>
<td>Type the expected date of return of</td>
<td>Format: MMDDYY</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>-----------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>9</td>
<td>Returned Field</td>
<td>O</td>
<td></td>
<td>Type the date the company property</td>
<td>Format: MMDDYY</td>
</tr>
</tbody>
</table>

**Company Property Form (PA16.1)**

(Image 21)
### Steps 10-14 of 14
(Image 21, Table 2)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Asset Field</td>
<td>O</td>
<td>Type the asset number of the company property being issued, if available.</td>
<td>Field allows for 9 characters. Example: 123456789</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Component Field</td>
<td>O</td>
<td>Type the component number of the company property being issued, if available.</td>
<td>Field allows for 3 characters. Example 111</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Value Field – First Box</td>
<td>O</td>
<td>Type the dollar value of the company property, if available.</td>
<td>Field allows for 13 characters.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Value Field – Second Box</td>
<td>O</td>
<td>Type or Select the currency that the value is being placed in.</td>
<td>For State of Arizona, should select ‘USD’ for United States Dollar. You may repeat these steps as many times as necessary.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Add/Change Buttons</td>
<td>R</td>
<td>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.</td>
<td>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.</td>
<td></td>
</tr>
</tbody>
</table>
### Education Form (PA20.1)

Education Form (PA20.1) provides the ability to track an Employee's education such as: High School, Associates, and/or Bachelor's Degree, etc.

#### Steps 1-9 of 14

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PA20.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The Education Form (PA20.1) will open.</td>
<td>The Education Form (PA20.1) provides the ability to track an Employee's education such as: High School, Associates, and/or Bachelor's Degree, etc.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Field should default to Company ‘1’. If field is not Company ‘1’, Type or Select ‘1’.</td>
<td></td>
<td>Company should always be ‘1’</td>
</tr>
<tr>
<td>3</td>
<td>Employee Field</td>
<td>R</td>
<td>Type the System will display</td>
<td></td>
<td>You must enter the correct</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>--------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>Inquire Button</td>
<td>R</td>
<td>Click Inquire</td>
<td>the employees EIN.</td>
<td>EIN.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>FC field</td>
<td>R</td>
<td>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 existing company property.</td>
<td>Notes</td>
<td>Notes</td>
</tr>
<tr>
<td>6</td>
<td>Degree Field</td>
<td>R</td>
<td>Type or Select from the drop down the degree obtained by the Employee.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Subject Field</td>
<td>O</td>
<td>Type or Select the subject of the degree.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Institution Field</td>
<td>O</td>
<td>Leave this field BLANK.</td>
<td>At this time, field is not populated and therefore will not be used.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Complete Date Field</td>
<td>O</td>
<td>Type or Select the completion date of the degree</td>
<td>Format: MMDDYY</td>
<td></td>
</tr>
</tbody>
</table>
### Education Form (PA20.1)

*(Image 22)*

#### Steps 10-14 of 14

*(Image 22, Table 2)*

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Rating Field</td>
<td>O</td>
<td>Type the grade point average or any other level that represents the employee’s educational performance.</td>
<td></td>
<td>Example: 4.0</td>
</tr>
<tr>
<td>11</td>
<td>In Process Field</td>
<td>O</td>
<td>Type or Select from the drop down menu the value that indicates whether the employee is in the process of obtaining the education, if</td>
<td></td>
<td>Valid values are: N = No Y = Yes *The default value is N</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>12</td>
<td>Verified Field</td>
<td>O</td>
<td>Type or Select from the drop down menu whether the change to this educational record has been verified, if applicable.</td>
<td></td>
<td>Valid values are: N = No, Y = Yes, *The default value is Y</td>
</tr>
<tr>
<td>13</td>
<td>Company Sponsor Field</td>
<td>O</td>
<td>Type or Select from the drop down menu whether or not the education was state sponsored, if applicable.</td>
<td></td>
<td>Valid values are: N = No, Y = Yes, *The default value is N</td>
</tr>
<tr>
<td>14</td>
<td>Change Button</td>
<td>R</td>
<td>Click ‘Change’ if updating a recording, or adding a record to information that previously existed. Click ‘Change’ if deleting a record that existed.</td>
<td>Change was clicked there will be a message in the lower left corner “Change Complete - Continue”.</td>
<td>Action is processed and saved.</td>
</tr>
</tbody>
</table>
## Competencies Form (PA21.1)

**Steps 1-9 of 17**  
(Image 23, Table 1)

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required (R) Optional (O)</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>White Search Box</td>
<td>R</td>
<td>Type <strong>PA21.1</strong> in the White Search Box. Press Enter on the keyboard</td>
<td>The Competencies Form (PA21.1) will open.</td>
<td>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.</td>
</tr>
<tr>
<td>2</td>
<td>Company Field</td>
<td>R</td>
<td>Field should default to Company ‘1’. If field is not Company ‘1’, Type or Select ‘1’.</td>
<td></td>
<td>Company should always be ‘1’</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------</td>
<td>---------------------------</td>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>3</td>
<td><strong>Employee Field</strong></td>
<td>R</td>
<td>Type the employee’s EIN.</td>
<td>System will display the employees name at the end of the field after advancing out of the field.</td>
<td>You must enter the correct EIN.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Inquire Button</strong></td>
<td>R</td>
<td>Click Inquire</td>
<td>HRIS will access needed information for the EIN</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Message “Inquiry Complete” will appear in the lower left corner.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td><strong>FC field</strong></td>
<td>R</td>
<td>Type ‘A’ in the FC field to add a new company property.</td>
<td>Notes</td>
<td>If ‘D’ is selected and no other changes are required, skip to step 17</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Type ‘C’ in the FC field to change an existing company property.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Type ‘D’ in the FC field to delete an existing company property.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td><strong>Competency Field</strong></td>
<td>R</td>
<td>Type or Select from the drop down menu the competency you are adding the employee’s record.</td>
<td>Type and Description of Competency will appear after entry.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Date Acquired Field</strong></td>
<td>O</td>
<td>Type or Select from the drop down the date the employee acquired the competency, if available.</td>
<td></td>
<td>Format: MMDDYY</td>
</tr>
<tr>
<td>8</td>
<td><strong>Last Used Field</strong></td>
<td>O</td>
<td>Type or Select from the drop down the date the employee last used the competency, if available.</td>
<td></td>
<td>Format: MMDDYY</td>
</tr>
<tr>
<td>9</td>
<td><strong>Rating Field</strong></td>
<td>O</td>
<td>Type the performance rating for the employee’s</td>
<td></td>
<td>Field allows for 3 numeric characters.</td>
</tr>
</tbody>
</table>
### Competencies Form (PA21.1)

*Image 23*

<table>
<thead>
<tr>
<th>No.</th>
<th>HRIS Field</th>
<th>Required</th>
<th>Step / Action</th>
<th>Expected Results</th>
<th>Notes / Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Competency</td>
<td>(R)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Proficiency Field</td>
<td>O</td>
<td>Leave this field BLANK.</td>
<td></td>
<td>Valid values are: FAILED INCOMPLETE PASSED</td>
</tr>
<tr>
<td>10</td>
<td>Main Tab – Verified Field</td>
<td>O</td>
<td>Type or Select from the drop down whether or not the Competency has been verified.</td>
<td></td>
<td>Valid values are: N = No Y = Yes *The default value is Y</td>
</tr>
<tr>
<td>No.</td>
<td>HRIS Field</td>
<td>Required (R) Optional (O)</td>
<td>Step / Action</td>
<td>Expected Results</td>
<td>Notes / Additional Information</td>
</tr>
<tr>
<td>-----</td>
<td>-----------------------------------</td>
<td>---------------------------</td>
<td>---------------</td>
<td>-----------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>12</td>
<td>Main Tab – Source Field</td>
<td>O</td>
<td>Leave this field BLANK.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Main Tab – Renewal Field</td>
<td>O</td>
<td>Type or Select from the drop down the date the employee must renew the competency, if applicable.</td>
<td>Notes If you leave this field blank and select a Renewal Cycle, the system calculates the renewal date based on the Date Acquired field.</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Main Tab – Company Sponsor Field</td>
<td>O</td>
<td>Type or Select from the drop down menu if the competency was company sponsored.</td>
<td>Valid values are: N = No Y = Yes *The default value is N</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Main Tab – Renewal Cycle Field</td>
<td>O</td>
<td>Type or Select the frequency in with which the competency must be renewed, if applicable.</td>
<td>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 2Y = 2 years 3Y = 3 years 4Y = 4 years 5Y = 5 years 6Y = 6 years 7Y = 7 years 8Y = 8 years 9Y = 9 years</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Main Tab – Instructor Field</td>
<td>O</td>
<td>Type the name of the employee’s instructor, if available.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Change Buttons</td>
<td>R</td>
<td>Click ‘Change’ if adding/updating a recording, or deleting a record where information previously existed.</td>
<td>Message in the lower left corner “Change Complete - Continue”. Action is processed and saved.</td>
<td></td>
</tr>
</tbody>
</table>