



## **Unicorn HRO**

# **Human Resources Common Objects**

**ABSENCE CODES:** Codes which represent reasons why an employee was not at work (i.e., vacation, floater, family leave, etc.). Absences may be entered manually into the **Absences** function if they are not being entered through the Payroll module. They may also be entered into the Payroll module through the **Time and Attendance** functions, **Lump Sums** or **Manual Payments**. If an absence code is associated with paid time off in the **Paid Time Off Absence Code Assignment** function, the number of hours that the employee was absent will be subtracted from his/her paid time off balance when the pay cycle is processed. The **Absence Report** may be run to print absence detail. If an employee has taken more hours than he/she is entitled to, the excess will print on the **Time and Attendance Report**. If absences are not associated with paid time off, this module is informational only.

No required values.

**ADDRESS STATUS CODES:** Codes for the different status types associated with the addresses of an employee, applicant or resume (i.e., active, suspended, etc.). This data is stored in the **Address** function. When an employee is added to the system, the address that is entered on the **New Hire** or **Add Employee** screen is automatically written with an address status code of “A” (active). When an employee changes his/her address, you may suspend the old address record and add a new active record, rather than deleting the old address. In this way you can store and view previous addresses. If, however, you change the address in **Demographics**, the active mailing address will be overwritten with the new information. Address status codes are used in conjunction with address types in certain ways throughout the system: When an employee is assigned to the payroll system via **New Hire** or **Payroll Activation**, his/her address type “01” (mailing address) and status “A” will be used as the home state to assign state income tax, if any. Or, you can specify that state income tax is assigned to the work state by setting the checkbox to “yes” in the “Allow SIT Assignment to Work State” field in HR COD State Codes. The employee’s home state will also be used to determine whether the employee is a resident of the state for tax assignment purposes, when necessary. When printing reports such as the **Employee Profile Report** containing employee addresses, the programs will use address type “01” and status “A”. When using the **Check Print** and **Voucher Print** options on the Payroll side, the system will use status type “01” (mailing address) and status “A”. When running **W-2 Data Generation** to create W-2 forms and tapes, and **SUI Magnetic Data Generation** to create SUI magnetic tapes, the system will use address type “01” and status “A”.

Required value: “A” (active status)

**ADDRESS TYPES:** These codes are for the different types of addresses associated with an employee, applicant, or resume (i.e., mailing, check, etc.). They are stored in the **Address** function. When an employee is assigned to the payroll system via **New Hire** or **Payroll Activation**, his/her address type “01” (mailing address) and status “A” will be used as the home state to assign state income tax, if any. Or, you can specify that state income tax is assigned to the work state by setting the checkbox to “yes” in the “Allow SIT Assignment to Work State” field in HR COD State Codes. The employee’s home state will also be used to determine whether the employee is a resident of the state for tax assignment purposes, when necessary. When printing reports such as the **Employee Profile Report** containing employee addresses, the programs will use address type “01” and status “A”. When using the **Check Print** and **Voucher Print** options

on the Payroll side, the system will use status type “01” (mailing address) and status “A”. When running **W-2 Data Generation** to create W-2 forms and tapes, and **SUI Magnetic Data Generation** to create SUI magnetic tapes, the system will use address type “01” and status “A”. Required values: “01” (mailing address)

Field:

Standard Information: If this checkbox is on, the address fields will be mandatory (Address Line 1, City, State, Zip Code and Country) in Employee Addresses, Resume Addresses and Applicant Addresses. A value of “on” means that this is a physical location. The mandatory fields ensure that any information mailed to the address will be deliverable. If the checkbox is off, the address fields are optional. This is used for other information such as e-mail addresses, etc.

**ALGORITHM SEQUENCE:** The values in this common object allow you to specify how pay differentials are calculated. For Pay Rate Overrides, Shift Overrides and Special Rate Overrides, the system defaults to adding the Additional Amount first, and then multiplying that amount times the Factor. You can specify the order in which these differentials take place, by either entering Factor (value “F”) to have the factor applied first, or Additional Amount (value “A”) to have the additional amount applied first.

Required values: “A” (additional amount), “F” (factor)

**ALGORITHM SEQUENCE OPTIONS:** When calculating pay differentials, you can use the values in this common object to specify the order in which the following are applied: Pay Rate Overrides (value “P”), Shift Overrides (value “F”) and Special Rate Overrides (value “R”). This is set up in the Pay Process Control window, accessed from Pay Code Definition.

Required values: “P” (Pay Rate overrides), “R” (Special Rate Overrides), “F” (Shift Overrides)

**APPLICANT STAGE CODE:** These are codes for the different stages in which an applicant may exist within the company’s hiring process. They are entered in the **Applicant Tracking Information** function or **Candidate Tracking** as the person progresses through each stage. When the person reaches the finalist stage, these codes are used in the **Finalist Worksheet**. Examples would be Received Resume, Setup Interview, First Interview, Offer Extended, etc. If the applicant stage code is “I”, the **Pre-Hire Interviews** function is used. If the applicant stage code is “R”, **Pre-Hire References** is accessed from the Candidate Tracking window, or if the code is “T”, the **Pre-Hire Testing** function is accessed.

No required values.

Fields:

Type of Activity (1A): current values are I (interview), R (reference) and T (testing)

Shell Document Name (12A): word processing file where interview shell document is stored (the drive and library path are stored in **Directory Defaults** in the Interview Path field.

**BENEFIT CARRIERS:** These are codes for the names of the different insurance carriers from which the company purchases benefit coverage. These codes are informational only. A benefit carrier code is mandatory when setting up **Benefit Plans** that are offered to employees. There is a **Carrier Addresses** file which stores various data about the carriers, including all contact names and phone numbers.

No required values.

**BENEFIT CATEGORY:** These are codes for the different types of coverage associated with a benefit plan (i.e., dental, medical, etc.), which is entered through **Benefit Plans**. Employees are only allowed to enroll in one benefit per category in the **Benefit Enrollment** option. Benefit category is a required field for employer benefit set up.

No required values.

Fields:

Show Coverage Amount (Y/N): If "Y," a benefit in this coverage category will show the employee's coverage amount in Steps 4, 5 and 6 of **First Time Enrollment, Life Events** and **Open Enrollment**, as well as on the Benefit Statement.

Sort Order: When benefit categories are displayed in **First Time Enrollment, Open Enrollment, Life Events** and the **Benefit Statement**, they will be sorted by the value in this field. Categories with "000" will appear first in the list; "999" will appear last. If more than one benefit category has the same Sort Order, the secondary sort will be the Long Description.

Sort By Description Only: When this checkbox is off, benefits within this Category will be sorted in ascending order by Cost, and then by Long Description of the Benefit Option. When this checkbox is on, benefits will be sorted by Long Description only.

**BENEFIT CHANGE REASON CODE:** These are codes for the different reasons why benefit information was changed for an employee (i.e., enrolled, beneficiary change, etc.). When an employee enrolls in a benefit through **Benefit Enrollment**, the reason code that is written to **Benefit History** is "A" (enrolled). When an employee's beneficiary, dependent or benefit enrollment is deleted, the reason code that is written to the history file is "T" (terminated). Reason code "S" (suspended) is written to the history file when the employee is terminated through **Terminate Employee**, and the status indicates that benefits should be suspended in Employment Status. If Employment Status indicated that benefits should be terminated, "T" will be written to history. When the **Benefit Update** is run, the user is required to enter a reason code, which will be written to Benefit History.

Required values: "A" (enrolled), "T" (terminated), "S" (suspended)

**BENEFIT COST METHODS:** These are codes for the different types of methods by which benefit plans can be costed. When a Benefit Plan is defined, through **Benefit Plans**, the Cost Method is selected.

Required values: "Amount" (Amount), "Pctbase" (Percentage Based), "Salpct" (Salary Percentage Based)

**BENEFIT GROUP:** These are codes for the different benefit groups associated with a type of benefit package (i.e., full-time employees, executive employees, etc.) Benefit plans and options must be assigned to a benefit group through **Benefit Plans**. Employees are assigned to benefit groups in the **Add Employee, New Hire** or **Work Profile** function. In **Benefit Enrollment**, the employee can enroll in benefits contained in his/her Primary Benefit Group. He/she may also enroll in benefit plans in other benefit groups, for example, for future enrollments. Only one benefit group can be the primary one for an employee. Reports such as **Benefit Eligibility Report, Benefit Premium Report** and **Employee Profile Report** use the Benefit Group. **Benefit History** is stored using Benefit Groups, Plans and Options. The **Benefit Update**

recalculates coverage and cost information for the requested benefits. **Defined Contribution Enrollment** is selected by Benefit Group, Plan and Option. Users have the option to automatically terminate benefit enrollment in the **Terminate Employee** function by selecting these options in the **Employment Status Definition** function.

Required value: blank.

Fields:

Value of Credit Per Dollar (n.nnnn): This applies to flexible benefit groups only. This factor will be multiplied by the employee's annual salary to arrive at the number of credits that an employee may use to purchase benefits. It is used with flexible benefits. The employee's salary method and salary amount is entered in **Salary Change**.

Flexible Benefit Group (Y/N): If "Y", employees will be enrolled through **Flex Benefit Enrollment** and benefits will be purchased with credits and/or cash. If "N", employees will be enrolled through **Benefit Enrollment** and benefits will be purchased through payroll deductions if there is an associated cost to the employee.

Factor To Calculate Credits (nnnn.nnn): This applies to flexible benefit groups only. This amount will be multiplied times the employee benefit cost from **Benefit Plans** to determine the actual amount that the employee will pay for this benefit, either in credits or cash. The amount will be displayed in **Flex Benefit Enrollment**.

COBRA Group (Y/N): If "Y", benefit coverage in this benefit group may be offered to COBRA participants through the **COBRA Benefits** function. These groups will not be available in **Benefit Enrollment**, **Flex Benefit Enrollment** or **Benefit Update**.

Payroll Deduction: This applies to flexible benefit groups only. If employees use credits to purchase benefits, enter a deduction in this field. If the employee purchases more benefits than the allowed credits, a deduction is created for the overage. If the employee does not use credits, leave this field blank and assign a deduction to each benefit in **Benefit Plans**.

Chart of Accounts ID: If you wish to create journal entries for employer benefit costs, enter the Chart of Account ID from the **Chart of Accounts Definition** function. Journal entries for this group can then be processed in **Benefit Journal Entry Generation**, **Benefit Journal Entries Inquiry** and **Benefit Journal Entries Purge**.

**BENEFIT OPTIONS:** These are codes for the available options within a benefit plan (i.e., employee only, family coverage, etc.). The benefit option is used in conjunction with the benefit plan to the fully define the benefit coverage; both are mandatory fields. The benefit plan and option fields can be used to define any characteristic about the benefit. They are entered in **Benefit Plans**. When an employee selects benefits through **Benefit Enrollment**, all benefit plans and options within the selected benefit group will be displayed. **Benefit History** is stored using Benefit Groups, Plans and Options. The **Benefit Update** recalculates coverage and cost information for the requested benefits. Users have the option to automatically terminate benefit enrollment in the **Terminate Employee** function by selecting these options in the **Employment Status Definition** function.

No required values.

**BENEFIT PLANS:** These are codes for the different types of plans associated with the employee's coverage (i.e., major medical, dental, etc.). The benefit plan is used with the benefit option to define the benefit coverage. Benefit plans and options are mandatory fields, in addition

to the benefit group. They are entered in **Benefit Plans**. When an employee selects benefits through **Benefit Enrollment**, all benefit plans and options within the selected benefit group will be displayed. **Benefit History** is stored using Benefit Groups, Plans and Options. The **Benefit Update** recalculates coverage and cost information for the requested benefits. Users have the option to automatically terminate benefit enrollment in the **Terminate Employee** function by selecting these options in the **Employment Status Definition** function.

No required values.

**BENEFIT STATUS CODES:** These are codes for the different statuses in which a benefit may be placed (i.e., active, suspended, etc.). When an employee enrolls in a benefit, the status field is automatically set to “A” (active). The status of a benefit can be viewed through **Benefit Enrollment**.

Required values: “A” (active), “S” (suspended), “I” (inactive), “T” (terminated)

**BLOOD TYPES:** These are codes for the different types of blood associated with an employee (i.e., A+, AB-, etc.).

**BODY PART:** These are codes for the different body parts associated with an employee’s occupational injury (i.e., leg, eye, etc.). When an workplace injury occurs, it can be entered in **Injuries**. Body Part is an optional field in this file. The **OSHA Report** uses this file to print injury and illness occurrences.

No required values

**BUDGET CLASS:** These are codes for the types of budget classes which allow multiple budget scenarios to be set up (i.e., actual budget, projected budget, etc.). They are entered in **Budgeting Setup**. The **Budgeted vs. Actual Report** can be run using different budget classes, and comparing them to actual payroll dollars. Class “1” is used by the system when running the actual budget report.

Required value: “1” (actual or live budget class)

**BUSINESS RELATIONSHIPS:** These are codes which represent the work relationships within your organization. Once defined in the common object, use the **Work Relationships** function to define the employees for each organization level. Messages can be defined in **Messaging Setup** to be sent to an employee’s work relationship.

No required values

**CARD TYPE:** These are codes which represent the different types of charge cards. They can be entered in the **Requisition Cost** or **COBRA Payments** functions.

No required values

**CELL CARRIER:** These are codes to describe the cell phone carrier applicable to the cell phone that was entered. They can be entered in the **Address** function.

No required values

Field: Text Messaging Address: Enter the SMS address. This can be obtained via an internet search. (40A)

**CERTIFICATIONS:** These are codes for educational or professional certifications, licenses or degrees associated with an employee, applicant or resume (i.e., CPA, RN, electrician, etc.). They are entered in the **Certifications** function. Certifications can also be specified as a requirement for a particular job through **Job Titles**.

No required values

**CLAIMS EXPENSE TYPES:** These are codes for the types of medical expenses incurred by an employee (i.e., inpatient, outpatient, etc.). These are entered in the **Employee Claims** function, which can be linked to **Flexible Spending Accounts** for payment.

No required values

**COBRA MEMBER STATUS:** These are codes for the status types associated with an employee who is eligible for COBRA benefits (i.e., active, inactive, etc.). This status is entered in **COBRA Information** when an employee becomes eligible for COBRA. These are used for COBRA reports and update processes (**COBRA Validate Payments**, **Members Whose COBRA Has Expired** and **Members Not Electing COBRA**).

Required values: “A” (active), “I” (inactive)

**COBRA MEMBERSHIP STATUS REASON:** These are codes which describe the reason for the COBRA member’s current status. The codes are user-defined, with the exception of the ones listed below. They are automatically entered in the COBRA member’s record when one of the COBRA updates is run.

Required values: “MS” (membership suspended; updated by the **COBRA Validate Payments** process); “MX” (membership expired; updated by the **Members Whose COBRA Has Expired** process); “NR” (no response; updated by the **Members Not Electing COBRA** process)

**COBRA PAYMENT DURATION:** These are codes for the lengths of time a COBRA member has elected to receive COBRA benefit coverage (i.e., 18 months, 36 months, etc.). This code is entered in **COBRA Information** when an employee elects COBRA benefit coverage.

Required value: blank.

Field: Payment Duration in Months (2N)

**COBRA QUALIFYING EVENT:** These are codes for the reasons why a person is eligible to become a COBRA member (i.e., employment ended). It is entered in **COBRA Information** when a person elects coverage.

No required values

**COMPENSATION PLAN TYPE:** These codes represent the method by which an employee’s salary is defined in **Compensation Methods** and **Salary Change**. Five methods are available: standard pay (code “STD”), position based (code “SLT”), pay by job (code “JOB”), rate index (code “IND”) and designated hourly rate (code “DHR”). The method that is selected will determine which data fields will appear on the salary entry screen. Once the compensation type has been entered, salary information can also be accessed through the **Salary Change** function. When the employee’s salary is calculated, either during the **Payroll Feeder**, **Manual Payments**

or when enrolling in a benefit which is defined with a salary multiplier (through **Benefit Enrollment**), the system will look at the employee's current compensation plan type and use the current salary.

Required values: "STD" (standard pay), "JOB" (pay by job), "IND" (rate index), "SLT" (position based), "DHR" (designated hourly rate).

**COMPLETION STATUS:** These are codes that specify the enrollee's status in a training course (i.e., enrolled, in progress, completed, etc.). Applicants and employees can be enrolled in courses. When a person is enrolled through the **Training Enrollment** function, a blank status is assigned. Statuses can be updated in the Training module in the **Training Class Administration** function. When an enrollee's status is changed to Completed, any training, skills and/or certifications that have been linked via the **Job Titles** function will be added to the following: **Training Information, Skills and Certifications**. Enrollees' courses can be viewed in **Training History and Enrollment**.

Required value: "COM" (completed)

**CORE BENEFIT CLASS:** These are codes used to automatically assign benefits to an employee when he/she is added into the system. In the **Add Employee** and **New Hire** functions, if a new employee is assigned to a Benefit Group, any benefits which have been given a core benefit class of "A" (all employees) will automatically be given to the employee. If the core benefit class is "S" (single coverage), the benefit will automatically be given to an employee with a marital status of "S". If the core benefit class is "F" (family coverage), the benefit will automatically be given to an employee whose marital status is not equal to "S". The core benefit class is associated with a benefit plan in **Benefit Plans**. If the field is left blank, the benefit will not be automatically assigned to employees. Core benefits assigned to employees can be viewed, changed or deleted through **Benefit Enrollment**. Whether or not the benefit is designated as "core", employees can be enrolled at any time.

Required values: blank (\*Non Core), "A" (all), "S" (single), "F" (family)

**COST TYPE:** These codes are for the types of costs associated with a training class or requisition (i.e., tuition, travel, etc.). These are used in the **Training Schedule** function. No required values

**COUNTRY CODES:** These are codes for countries within an address (i.e., Australia, U.S.A., etc.). They are used in **Add Employee, New Hire, Demographics, Address, Previous Employment, Medical Visits, Injuries, Agency Information, Organization Setup, and Carrier Addresses**. A country code can be entered in **Defaults** in the **Preferences** area, so that it is automatically entered on new records containing this field. It can be overridden if necessary. When the federal W-2 file is produced, and the employee's state is not one of the 52 valid codes (50 state codes, DC or PR), the system will treat it as a foreign address. In the Country field, it will write the first 2 characters of the country code from the employee's address record. This must be a valid country code as defined by the IRS in the EFW2 instructions.

No required values

Fields:

Currency (3A)



Pay Card Country Code (3N)

ISO Country Code (2A): Enter the country code as defined by ISO, to be used when an employee has a direct deposit account with IAT information.

**COUNTY CODES:** These are codes for counties within a state associated with an address (i.e., Bergen, Hudson, etc.). They are used in **Add Employee, New Hire, Demographics, Address, Previous Employment, Medical Visits, Organization Setup, and Agency Information**. The county name is printed on the **EEO-1 Report** as part of the location address, and is used for the VETS-100 report. Entries in this table should only contain the actual county name, and not be followed by the word “county”. As an example, you would enter “Hudson” as opposed to “Hudson County”. This is per EEO reporting regulations.

No required values

Field: County Number (3N): For Louisiana SUI diskette reporting, enter the 3-digit numeric FIPS code corresponding to each of the SUI Locations.

**COURSE GRADE:** These codes represent the grade that an enrollee attained upon completion of a training course. These are recorded in the Training module in the **Training Schedule** function. Grades for completed courses will appear in **Training History and Enrollment**.  
No required values.

**CURRENCY CODES:** These are codes for currency types associated with salaries and payments (i.e., U.S. dollar, French franc, etc.). They are used in **Salary Change, Salary History, Employee Claims, Job Reviews, Previous Employment, Property, Flexible Spending Accounts** and **Training Schedule**. A currency code can be entered in **Defaults** in the Preferences area, so that it is automatically entered on new records containing this field. It can be overridden if necessary.

No required values

Field: Language Code (3A)

**DAYS OF WEEK:** These are the names of the days of the week (i.e., Monday, Tuesday, etc.). They are displayed in **Injuries** based on the date of the injury.

Required values: “1” (Sunday), “2” (Monday), “3” (Tuesday), “4” (Wednesday), “5” (Thursday), “6” (Friday), “7” (Saturday)

Field: Language Code (3A)

**DEFINED CONTRIBUTION TRANSACTION TYPE:** These are codes for the different types of transactions made within an employee’s defined contribution account (i.e., contributions, loan taken, etc.)

**DEFINED CONTRIBUTION CHANGE REASON:** These are codes for reasons why an employee’s defined contribution enrollment has changed.

**DEFINED CONTRIBUTION FUND OPTIONS:** These codes represent funds in which employees may invest their defined contributions (i.e., stock index, real estate, etc.). Employers define the available funds for each plan in **Employer Defined Contribution Setup**. Employees

elect funds, along with percentages allocated to each, through **Employee Defined Contributions**.

**DEFINED CONTRIBUTION LOAN TYPES:** These are types of loans an employee can take against his/her defined contribution vested amount (i.e., mortgage, college tuition, etc.).

**DEFINED CONTRIBUTION PLAN SOURCE:** These are codes for the different types of sources from where an employee's defined contributions originate (i.e., employee deduction, employer match, rollover, etc.). They are used in the **Defined Contribution Enrollment** and **Defined Contribution Schedules and Options** functions.

**DEFINED CONTRIBUTION STATUS:** Reserved for future use.

**DEPENDENT STATUS CODE:** These codes represent different status types associated with an employee's dependent (i.e., active, suspended, etc.). They are assigned to dependents in the **Dependents** function. When a dependent is covered by a benefit plan, his/her status will appear in **Benefit Enrollment**.

Required value: "A" (active)

**DIRECTORIES:** These codes represent the functions that contain links to other software packages. Examples of such packages would be word processors, spreadsheets and report writers. For each function, a code is defined. The code contains the directory path that the system will default to when you create or modify a file. If no directory exists for that particular function, it will use the generic Word Processor File path. If this record does not exist, it will go to your system default library. There are also directories to be used to access your spreadsheet software, word processor software, and report builder software.

Required values: "api" (Applicant Picture), "app" (Applicants), "apt" (Applicant Testing), "ben" (Benefits), "can" (Candidate), "cat" (Candidate Testing), "cob" (COBRA Directory), "ddp" (Direct Deposit), "def" (Defined Contribution), "ent" (Entitlements), "epi" (Employee Picture), "ern" (Earnings), "fdd" (Direct Deposit submitted from Payroll Wizard), "fed" (federal and state W-2 diskettes), "fin" (Finalist), "fsa" (Flexible Spending Account), "grv" (Grievance), "gwn" (News Upload), "int" (Interviews), "kre" (Standard Export file), "lck" (Lock Finder), "loc" (W-2 local diskettes), "mas" (Master Tax), "pmt" (Payment Reconciliation), "pop" (HR Population), "prp" (PR Population), "rbd" (Report Builder Database), "rbl" (Report Builder Library), "ref" (References), "res" (Resumes), "rev" (Reviews), "rex" (OrgPlus Export), "rpi" (Resume Picture), "sbd" (Savings Bond Diskette Creation), "spf" (Spreadsheet File), "spr" (Spreadsheet), "sui" (SUI files), "trn" (Training), "vet" (VETS-100 Diskette Creation), "wrd" (Word Processor), "wrf" (Word Processor File)

**DISABILITY CODES:** These are codes for the different disabilities associated with an employee (i.e., hearing loss, visual impairment, etc.). They are entered in **Demographics**.

**DISCIPLINARY ACTION TYPE:** These are codes for the different types of disciplinary actions that can be taken against an employee (i.e., warning, probation, etc.). Information regarding these actions is accessed through the **Disciplinary Actions** function.

**EDUCATION DEGREES:** These are the degrees that a person may possess (i.e., B.A., B.S., etc.). They are entered in **Education**.

**EDUCATION LEVEL:** These are codes for different levels of education associated with an employee, applicant, or resume (i.e., graduate school, high school, etc.). They are entered in **Education**.

**EDUCATION TYPE:** These are codes for the different types of education associated with an employee, applicant or resume. They are entered in **Education**.

**EDUCATIONAL COURSE CODE:** These are codes for the different majors, or courses of study, that a person may take (i.e., fine arts, business, etc.). They are entered in **Education**.

**EDUCATIONAL INSTITUTION CODES:** These codes represent the schools or learning institutions that a person has attended (i.e., Harvard, Yale, etc.). They are entered in **Education**.

**EEO JOB CATEGORY:** These codes represent the job categories established by the Equal Employment Opportunity Commission. They are associated with **Job Titles**. When a position is established through **Position Control**, the job title's EEO Job Category is brought into the position, where it may be overridden if necessary. If an EEO Job Category is changed in **Job Titles**, the system will ask the user if the EEO Job Category should also be updated in any related positions. When an employee is assigned to a position through **Position Assignment**, or given a job title in **Add Employee**, **New Hire** or **Transfer Employee**, it will be used by the **EEO-1 Report** to show employment data. Apprentice data is shown in the **EEO-2 Report** by EEO Job Category, and the **VETS-100 Report** shows employment totals by EEO Job Category. The **Employee Profile Report** and **New Hires Report** print EEO Job Category information. Required values: "01" (First/Mid Level Officials and Managers), "02" (Professionals), "03" (Technicians), "04" (Sales Workers), "05" (Administrative Support), "06" (Craft Workers (Skilled)), "07" (Operatives (Semi-Skilled)), "08" (Laborers (Unskilled)), "09" (Service Workers) and "11" (Executive/Senior Level Officials and Managers)

Field:

EEO1 Line#: This field is used to store the sort order of the lines on the EEO-1 report and file.

**EEO4 ACTIVITY CODE:** These codes represent the department, or activity, that is part of a state or local government agency for EEO-4 reporting purposes. They are associated with an organization through the EEO Information Setup section in **Organization Setup**. The EEO Job Category must exist in **Position Control**. Employees must be assigned to positions through **Position Assignment**, where the number of Available Hours per week must be entered. The Include in Base Wage option in Pay Process Control (**Pay Code Definition**) must be selected for regular and recurrent pay types included in annualized salary. To report EEO-4 information, run **EEO-4 Reporting**. After the file is created through that function, run **EEO-4 File Creation** to write the information to a diskette. To view files that have been created, run **EEO4 File Inquiry**.

Required values: “01” (Financial Administration), “02” (Streets and Highways), “03” (Public Welfare), “04” (Police Protection), “05” (Fire Protection), “06” (Natural Resources), “07” (Hospitals and Sanatoriums), “08” (Health), “09” (Housing), “10” (Community Development), “11” (Corrections), “12” (Utilities and Transportation), “13” (Sanitation and Sewage), “14” (Employment Security), “15” (Other)

**EMAIL ADDRESS TYPES:** These are codes which represent the types of e-mail addresses that can be stored on the system. When a Message is set up to be sent to the employee’s Reports To, the system will send the message to the first value that it can find. It first looks for a value of “1”, then “2”, then “3”.

Required values: “1” (Work E-Mail Address), “2” (Home E-Mail Address), “3” (Alternate E-Mail Address)

**EMPLOYMENT SOURCE:** These are codes which represent the agency or source through which a person was referred to the company (i.e., newspaper, headhunter, etc.). Additional data regarding the agency is entered in the **Agency Information** function. Sources are associated with people through the **Add Employee**, **New Hire** or **Work Profile** functions

**ESS LOGIN GROUPS:** These codes are used in **Employee Security** to determine the functions that employees see in Employee Self Service. Use **ESS News Upload** to store home pages for ESS Login Groups. Use **Onboard Setup** to define a separate ESS menu for newly hired employees, according to their ESS Login Group.

**FAIR LABOR STANDARDS ACT CODE:** These are codes for the different types of labor standards associated with the FLSA (i.e., exempt, non-exempt). The code for each employee is stored in the **Work Profile** function.

**FILE TYPES:** These are codes which represent the types of files that can be stored in various functions. The required values listed below are used only in their corresponding functions. Any other values will appear in the drop down list in **Employee Files**.

Required values: “CER” (**Certifications**), “DIS” (**Disciplinary Actions**), “EPF” (employee photo that is displayed in Manager Services), “FMC” (**FMLA Certifications**), “FW4” (**W-4** function in Employee Self Service) “I9” (**I-9**), “REV” (**Job Reviews**), “W4” (if federal W-4 is uploaded using the **Employee Files** function in Manager Services)

Fields:

Visible: This field is reserved for future use.

Employee Accessible: If you want employees to see this type of file in the Employee Self Service function called **Employee Files**, select this checkbox. For values other than those listed below, all records from the Manager Services function **Employee Files** will be shown in Employee Self Service, whether or not a file is associated with the record. If you select this checkbox on any of the following values, records will only be shown in Employee Self Service if the record has a file associated with it:

“CER” (**Certifications**)

“DIS” (**Disciplinary Actions**)

“FMC” (**FMLA Certifications**)

"I9" (I-9)

"REV" (Job Reviews)

**FLEXIBLE SPENDING ACCOUNTS:** These are codes for Flexible Spending Accounts, as defined by the IRS. FSAs are associated with an FSA Group through **Flexible Spending Account Plans**. Employees are assigned to an FSA Group through the **Add Employee, New Hire** or **Work Profile** function. They are enrolled in FSAs within their FSA Groups through **Flexible Spending Accounts**. **Employee Claims** are entered and associated with FSAs. They are paid through FSA Enrollment.

Fields: Medical: enter "yes" if this represents a medical FSA. By so doing, the FSA Payment Generation function will pay all medical claims, regardless of the amount the employee has contributed.

Dependent Care: enter "yes" if this represents a dependent care FSA. Claims will only be paid if the employee has contributed enough money to cover the claim.

Sort Number: if you wish to sort FSAs differently than the Flexible Spending Accounts Code, enter a number in this field. FSAs will be sorted from lowest to highest, such as 10, 20, 30. This affects **First Time Enrollment, Life Events** and **Open Enrollment** in Employee Self Service, and **Open Enrollment** in Manager Services.

**FSA GROUP:** These are codes for groups of Flexible Spending Accounts that can be offered to employees. FSAs are associated with an FSA Group through **Flexible Spending Accounts Plans**. Employees are assigned to an FSA Group through the **Add Employee, New Hire** or **Work Profile** function. They are enrolled in FSAs within their FSA Groups through **Flexible Spending Accounts**. **Employee Claims** are entered and associated with FSAs. They are paid through FSA Enrollment.

**GENDER CODES:** These are codes for the genders associated with an employee or applicant (i.e., male or female). A gender code is entered in **Add Employee, New Hire, Demographics** and **Dependents**. The **EEO-1 Report** shows employment data by males and females within each location.

Required values: "M" (male), "F" (female)

**GRIEVANCE CATEGORY:** These are codes used to describe the broad category under which a specific grievance might be included. They are associated with grievances that an employee may file against the company. They are entered in **Grievances**.

**GRIEVANCE CODES:** These are codes for the different types of grievances that an employee may file against the company. They are entered in **Grievances**.

**HEALTH SAVINGS ACCOUNTS:** These are codes for Health Savings Accounts, as defined by the IRS. HSAs are associated with an HSA Group through **Health Savings Account Plans**. Employees are assigned to an HSA Group through the **Add Employee, New Hire** or **Work Profile** function. They are enrolled in HSAs within their HSA Groups through **Health Savings Accounts**.

Fields: Self-Only: enter "yes" if this represents an employee-only HSA.

Family: enter “yes” if this represents an HSA that covers the employee and his or her family.  
Sort Number: if you wish to sort HSAs differently than the Health Savings Accounts Code, enter a number in this field. HSAs will be sorted from lowest to highest, such as 10, 20, 30. This affects **First Time Enrollment**, **Life Events** and **Open Enrollment** in Employee Self Service, and **Open Enrollment** in Manager Services.

**HSA GROUP:** These are codes for groups of Health Savings Accounts that can be offered to employees. HSAs are associated with an HSA Group through **Health Savings Accounts Plans**. Employees are assigned to an HSA Group through the **Add Employee, New Hire** or **Work Profile** function. They are enrolled in HSAs within their HSA Groups through **Flexible Spending Accounts**.

**I9 FORMS TYPES:** These are codes for the different types of employment eligibility forms that an employee must provide in order to work for the company (i.e., birth certificate, green card, etc.). This information is entered in **I-9**.  
Field: Termination Required (Y/N)

**ILLNESS/INJURY OCCURRENCE:** These are codes for an occupational illness or injury that may occur on the job (i.e., illness or injury). Data about the occurrence is stored in **Injuries**. The **OSHA Report** prints detailed and summarized information on these types of occurrences.  
Required values: “IL” (illness), “IJ” (injury)

**ILLNESSES AND INJURIES:** These are codes for the different types of illnesses or injuries that may occur to an employee (i.e., poisoning, skin disease, etc.). They are stored in **Injuries**. Certain illnesses and injuries have been designated by OSHA to be shown on the **OSHA Report**. Codes IL01 through IL07 will appear in the Illnesses section. Any codes beginning with “IJ” will appear in the Injuries section.  
Required values: “IL01” (Skin disorder), “IL03” (respiratory condition), “IL04” (poisoning), “IL07” (all other occupational illnesses), “IL26” (hearing loss)

**INDIVIDUAL TO BE TESTED TYPE:** These are codes that identify the individuals taking a test as a prerequisite for employment (i.e., applicant, employee). This information is entered in the **Pre-Hire Testing** function.  
Required values: “A” (applicant), “E” (employee)

**INSTRUCTION METHODS:** These are codes used to describe the way the course is taught (i.e., seminar, in-house class, etc.). It is associated with a training class through **Course Definition** and **Training Schedule**.

**JOB CLASS:** These are codes used to define classes within job groups. Job Classes and Job Groups are defined within **Rate Indexes**, and are used to store employee hourly pay amounts. A Rate Index, Job Class and Job Grade are entered in **Salary Change**. Job Class data is stored in **Work History** and **Salary History**. Data is also printed on the **Employee Profile Report**.

**JOB EVALUATION POINT MODELS:** These are codes for the different types of models that store point ranges and their associated dollar values. Job evaluation point models are entered in **Job Evaluation Point Definition**. Employee characteristics and their associated number of points are entered for each position through **Position Control**. Using these two functions, the midpoint of the position's salary range is calculated. Minimum and maximum salary range values are calculated using the Low Percentage and High Percentage fields stored in the Level 2 value in **Organization Setup**. When calculating salary ranges, model "Mod01" is used as the "live" model. If job evaluation points are entered for a position, they will override any salary class and grade that are entered, when calculating the position's salary range. The employee's position in range is calculated and displayed in **Salary History**. The salary range calculated for job evaluation points is printed on the **Employee Profile Report**.  
Required value: "Mod01" (live, or current, model)

**JOB GRADE:** These are codes used to define levels within job classes. Job Classes and Job Groups are defined within **Rate Indexes**, and are used to store employee hourly pay amounts. A Rate Index, Job Class and Job Grade are entered in **Salary Change**. Job Grade data is stored in **Work History** and **Salary History**. Data is also printed on the **Employee Profile Report**.

**JOB GROUPS:** These are codes for the sub-classifications of EEO job categories used for the **New Hires Report** (i.e., entry level sales, senior sales, etc.). A Job Group is associated with a title through **Job Titles**.

**JOB REVIEW ITEMS:** These are codes for the different types of job review ratings that employees can be evaluated on. They are associated with job reviews through **Job Review**.

**JOB TITLE CLASS:** These are codes for the different types of major job classifications within the company (i.e., sales, administration, etc.). They are associated with job titles through **Job Titles**.

**LABOR AFFILIATION:** These are codes for the different types of labor unions associated with an employee. They can be entered through **Add Employee, New Hire** or **Work Profile**.

**LANGUAGE CODES:** These are codes used to identify the language(s) spoken. (Field was previously stored in Demographics; data is now stored in Skills.)

**LIFE EVENTS CODES:** These are codes for the different types of evnts that employees can select in the **Life Events** function in Employee Self Service.

Required values: 01 (LEM, for Marriage), 02 (LEB, for Birth of Child), 03 (LED, for Divorce), 04 (LES, for Legal Separation), 05 (LEX, for Dependent Death), 06 (LMV, for Change of Address), 07 (LDS, for change of Dependent Student Status), 08 (LSE, for Spouse Employment Status), 09 (LEA, for Adoption of Child), 10 (LSC, for Employment Status Change), 11 (LEO, for Employee Ages Out), 12 (LDO, for Dependent Ages Out), 13 (LDE, for Dependent Eligibility), 14 (LCM, for Court Mandated Dependent)

**LOAN REASON CODES:** These are codes for the different reasons why a loan was requested by an employee from his/her defined contribution balance (i.e., tuition, mortgage, etc.)

**MARITAL STATUS:** These are codes for the different marital statuses associated with an employee (i.e., married, single, etc.). This information is entered in **Add Employee, New Hire or Demographics**.

**MEDICAL TESTS:** These are codes for the different types of medical tests associated with an employee. They are entered in the **Medical Visits** function.

**MEDICAL VISIT TYPES:** These are codes for the different types of medical visits for which an employee went to a doctor or medical office (i.e., drug test, physical, etc.). These are entered in the **Medical Visits** function.

**MILITARY BRANCH:** These are codes for the different branches of the military associated with an employee (i.e., army, marines, etc.)

**MILITARY RANK AT DISCHARGE:** These are codes for the different military ranks associated with an employee when he/she was discharged (i.e., Admiral, Captain, etc.)

**MINNESOTA PERA CLASSES:** These are codes for the different employee types for PERA Reporting.

Required values: “FT” (Full Time), “IO” (Inter/On Call), “OT” (Other), “PT” (Part Time), “SL” (Seasonal).

**MINNESOTA PERA EMPLOYMENT STS:** These are codes for the different types of employment statuses for PERA Reporting.

Required values: “A” (Return To Work), “C” (Death), “K” (Maternity Leave), “L” (Layoff), “M” (Medical Leave), “N” (New Enrollee), “P” (Personal Leave), “T” (Terminated), “W” (Worker’s Comp), “X” (Military Leave).

**MINNESOTA PERA EXCLUSIONS:** These are codes for the different reasons why an employee is excluded from participation in PERA.

Required values: “001” (Student), “002” (PERA Disability), “003” (PERA Annuity), “004” (Foreign Citizen), “005” (Federal Service), “006” (Residency Program), “007” (Student Intern), “008” (Patient/Inmate), “009” (Contractor), “010” (Grant Employee), “102” (Emergency Employee), “103” (Teaching Service), “104” (Volunteer Ambulance), “105” (Elec. Officers), “106” (Officers NC), “202” (Pre-1972 Exempt), “203” (City Manager), “301” (Less Than \$425), “302” (Less Than \$5100), “303” (Part Year Less than \$425), “401” (Less Than \$425 + 6 Months), “402” (Less Than \$5100 + 6 Months).

**MINNESOTA PERA PLANS:** These are codes for the different types of plans in which employees can be enrolled.

Required Values: “01” (Basic Plan), “02” (Coordinated Plan).



**MINNESOTA PERA POSITIONS:** These are codes for the different types of job positions that employees belong to.

Required Values: “ADMN” (Administrator), “CROF” (Correctional Officer), “CTMG” (City Manager), “ELOF” (Elected Officer), “FRFT” (Firefighter), “MDPH” (Physician), “OTHR” (Other), “PLOF” (Police), “PRMD” (Paramedic), “UNOF” (Union Officer).

**MONTHS OF THE YEAR:** These are codes for the different months within the year (i.e., January, February, etc.). This table is used by **Paid Time Off Policies** when defining Paid Time Off 1st Year Accrual Rules.

Required values: January (01), February (02), March (03), April (04), May (05), June (06), July (07), August (08), September (09), October (10), November (11), December (12)

Field:

Month Code (2A)

**NEW HIRE FORMS:** These are codes for the forms that need to be filled out by a newly-hired employee. The Form Type is entered on the **Forms** function.

Fields:

Directory For Form (40A)

Required For New Hire (Yes/No)

**NOTES CATEGORY:** These are codes representing the categories for **Employee Notes**.

Categories are optional. If they are used, you may specify whether or not to Use Notes Category Authorization. If this checkbox is selected, users will only be able to work with Employee Notes where they have a **Notes Category Authorization** record setup.

Field:

Use Notes Category Authorization.

**OBJECT CAUSING INJURY:** These are codes representing objects that caused occupational injuries (i.e., hammer, spill, etc.). These codes are used in **Injuries**, and are shown on the **OSHA Report**.

**PAID TIME OFF BUCKETS:** These codes represent amounts that will be stored separately within a particular Paid Time Off Policy. For example, if a Paid Time Off Policy for sick time included a maximum 100 hours accrual, and then further accrued hours are to be considered “reserve” sick time, two buckets would be set up: Sick Time and Reserve Sick Time. Each bucket has a maximum accrual. Accruals and Hours Used will affect the Bucket #1 until the maximums have been reached, then Bucket #2, etc. Buckets are set up in Paid Time Off Policies. An Paid Time Off Group is assigned to an employee through the **Add Employee, New Hire** or **Work Profile** function. Balances, stored in hours, are updated during **Payroll Feeder**. Employees only receive the paid time off that is associated with their Paid Time Off Group, where the accrual rules are defined. Balances for employees can be viewed through the **Paid Time Off** function.

**PAID TIME OFF CODES:** These codes represent different types of paid time off from work (i.e., vacation, holiday, etc.). They are associated with a Paid Time Off Group through **Paid**

**Time Off Policies.** Balances, stored in hours, are updated through the **Payroll Feeder**. Balances for employees can be viewed through the **Paid Time Off** function.

**PAID TIME OFF FORMULA:** Standard paid time off processing is provided with iCON. If you need to modify the formula, additional values can be added to this table to provide a user exit to the modified program. Paid Time Off Formulas are associated with paid time off codes in **Paid Time Off Policies**. When adding a new value to be used with special paid time off processing, use the Process Name field to enter the name of the custom program. You may use a program called ent\_pds.p, which is provided with iCON, which accrues at the rate the employee is at as of January 1st. By using this program, the rate of accrual does not change during the year. This program can only be used with Calendar plans.

Required value: blank (Standard Processing)

**PAID TIME OFF GROUP:** These are codes for groups of paid time off policies which may be offered to a certain type of employee (i.e., full-time, part-time, etc.). Paid Time Off Codes are associated with paid time off groups through **Paid Time Off Policies**. A Paid Time Off Group is assigned to an employee through the **Add Employee, New Hire** or **Work Profile** function. Balances, stored in hours, are updated through the **Payroll Feeder**. Employees only receive the paid time off that is associated with their paid time off group, where the accrual rules are defined. Balances for employees can be viewed through the **Paid Time Off** function.

**PAID TIME OFF PLAN TYPE CODES:** These are codes for the different ways of accruing paid time off (i.e., anniversary plan or calendar plan). A plan type code is associated with paid time off through the **Paid Time Off Policies** function. The **Payroll Feeder** uses this field to determine when a new accrual record is written. If paid time off is on the anniversary plan, a new accrual will begin on the anniversary of the first field it finds in the **Work Profile** function in the following order: Paid Time Off Start Date, Adjusted Hire Date, or Original Hire Date. If paid time off is on the calendar plan, accruals and hours used will be reset on January 1 of each year. Required values: “A” (anniversary plan), “C” (calendar plan)

**PAID TIME OFF REQ DESCRIPTION:** These are codes for the different requirements an employee must meet in order to earn paid time off hours (i.e., hours worked, months employed, etc.). Requirements are associated with paid time off in the **Paid Time Off Policies** function. The **Payroll Feeder** uses this field to determine the amount of accrued hours that an employee receives, based on the number of hours worked or months employed. If the paid time off is based on the number of hours worked, the system will calculate the number of hours the employee worked for this pay period. The pay types that are used for this calculation are indicated with a Yes in **Pay Code Definition** in the Accrue Paid Time Off field. If this field is No, those hours will not be used to accrue paid time off. If the paid time off accrues based on months employed, the update process will compare the time between the Adjusted Hire Date from the **Work Profile** function (or if none, the Original Hire Date) and the Pay Period End Date. Required values: “H” (hours worked), “M” (months employed), “B” (employee birthday), “O” (paid holiday), “P” (per pay period)

**PAID TIME OFF UPDATE OPTION:** This code is used in **Paid Time Off Policies** to determine whether the paid time off is updated during the **Payroll Feeder**.  
Required values: “H” (Human Resources), “P” (Payroll)

**PAYMENT METHODS:** These are codes for the various ways in which payments are made (i.e., credit card, check, etc.). They are entered in the **Requisition Cost** and **COBRA Payments** functions.

**PAYROLL DEDUCTIONS:** These are codes for the different types of payroll deductions that can be assigned to an employee (i.e., union dues, benefit costs, etc.). If employees contribute to the cost of a benefit, the payroll deduction is entered in the **Benefit Plans** function, and is assigned to an employee through either **Benefit Enrollment**. On the payroll side, deductions are defined by legal entity using the **Deduction Definitions** and **Employer Deduction Contributions** functions. Deductions are assigned to employees through **Deductions** function.  
Fields:

Garnishment (Y/N): If “Y”, **Deduction** will require a Garnishment Type in order to calculate wages exempt from garnishment.

Reduces Disposable (Y/N): This is in effect only for garnishment deductions. Normally, disposable income is calculated as gross pay minus taxes. However, if there is a deduction that must be subtracted from disposable income, set this to “Y”. It will then be subtracted before the garnishment deduction is calculated.

W-2 Box 10 Dependent Care: If “yes”, the year-to-date amount of this deduction will print in Box 10 of the W-2 form.

W-2 Box 11 Non-Qualified Plan: If “y”, the year-to-date amount of this deduction will print in Box 11 of the W-2 form. If “g”, the year-to-date amount of this deduction will print in Box 11 with a “G” next to it.

(Up to 2000: W-2 Box 12 Fringe Benefits): No longer used

W-2 Box 12: Employee: If a value is selected in this field, it will cause the year-to-date amount of the employee-paid deduction to print in Box 12 of the W-2 form. Only the current allowable letters appear in the pull-down box.

W-2 Box 14 Other: If “yes”, the first three characters of the deduction’s Short Description will print in Box 14 of the W-2 form, along with the year-to-date amount.

W-2 Deferred Comp. (PR CODA, Annual Comp. Limit): This field is used for two purposes. (1) If “yes”, the Deferred Compensation amount will print on the Puerto Rico W-2 form. (2) If “yes” and an amount exists in Annual Compensation Limit for Deferred Compensation Plans in the HR System Defaults function, the system will stop deduction amounts when the employee’s year-to-date FIT Tax Base, plus deductions with D, E or G in Box 12, plus year-to-date amounts for deductions whose Long Description starts with “125”, exceed the annual compensation limit.

W-2 Retirement Plan: If “yes”, the Retirement Plan box in Box 13 will contain an “X”.

Puerto Rico W-2 Code: When printing the Puerto Rico form 499R-2/W-2PR, a value in this box will cause the year-to-date amount of this deduction to be printed as follows: “D” will print in Box 6B – Charitable Contributions; “C” will print in Box 8 – Commissions; “A” will print in Box 9 – Allowances; “R” will print in Box 12 – Reimbursed Expenses; “M” will print in Box 16A – Contributions to the Save and Duplicate your Money Program

Savings Bond: If “yes”, the deduction can be set up as a savings bond deduction with the corresponding information.

Kansas Retirement System: If “yes”, the deduction amount will be written to the Kansas W-2 file. This applies to the Kansas Public Employees’ Retirement Systems (KPERS) or Kansas Police & Firemen’s Retirement System (KP&F).

Display in Paycheck Calculator: select this checkbox to display the deduction in the Paycheck Calculator function in Employee Self Service and Manager Services.

W-2 Box 12: Employer: If a value is selected in this field, it will cause the year-to-date amount of the employer-paid deduction to print in Box 12 of the W-2 form. Only the current allowable letters appear in the pull-down box. As of this writing, employer HSA deductions must be included in Box 12 code W. Also as of this writing, employer HSA deductions are taxable for California and New Jersey.

W-2 Box 12: Prior Year: If this deduction represents a contribution to a prior year deferred compensation plan under USERRA, enter the 2-digit year in this field. This will cause the amount to print in Box 12 of the W-2 form with the Box 12 code and the 2-digit year.

Deduction Type: If this deduction has a global deduction limit, select the corresponding deduction type. The Max Per Year field can then default to 999,999,999.99 and the global deduction limit will be used. This eliminates the need to create new deduction formulas when the IRS changes the ceilings for deductions such as 401(k).

Employer Match SUI Taxable: Select this checkbox if the employer contribution should be added to SUI taxable wages for Arkansas, Illinois and Massachusetts.

457(b) Employer Match FICA/FICM Taxable: Select this checkbox if the employer contribution should be added to FICA and FICM taxable wages.

HSA Employer Contribution AL SIT/SUI Taxable: if employer deductions for your HSAs are taxable for Alabama, select this checkbox.

**PHONE NUMBER TYPE:** These are codes for the different types of phone numbers (i.e., main, fax, etc.) associated with an outside supplier. They can be entered in the **Address** function or the Carrier Phonebook option of **Carrier Addresses**. In Employee Self Service, they can be entered in **Address Information**.

Field:

Employee Directory Type: If you give your employees access to the Employee Directory in Employee Self Service, select Primary or Secondary if you want to display this phone type in the directory.

**PHYSICAL DEMAND DEFINITION:** These are codes for the different types of physical abilities required by a job position. It is associated with a category, which can be accessed through the **Physical Demand Categories** option. When the **Physical and Environmental Job Requirements** option is accessed, the Physical Demand Category is selected. Physical Demand Definitions can then be selected from within the category and associated with the job title.

Field: Category (4A): The category code from Physical Demand Categories is entered here.

**POSITION POINTS DEFINITION:** These are codes for the different types of job evaluation points that are associated with a position through **Position Control**. The number of points for a

position is totaled, and the salary range is calculated from the live model set up in **Job Evaluation Points Definition**.

**POSITION STATUSES:** These are codes for the different statuses that may be assigned to a position when the FTE Position Control module is being used. They are entered in **FTE Position Number Maintenance**. Employees may only be assigned to a position that has a status of Open and Approved.

Required values: Budgeted (BUD), Deleted (DEL), Eliminated (ELM), Filled and Approved (FAP), Open and Approved (OAP), Open (OPN)

**PROCESS IDS:** These codes represent processes that have been set up in the system to automate certain functions. As an example, **Requisition Approval** is a process. In **Process Authorization**, employees must be given security to the process. When the employee attempts to run the process, the system will check that he/she is authorized to the process itself on the **PIN Number Validation** panel. If so, the employee's PIN from the **PIN Assignment** function will be verified. If it matches the PIN that the employee entered, processing will continue; otherwise, an error message will prevent the employee from completing the process.

Required value: "Req" (Requisition Approval)

**PROPERTY CATEGORY:** These are codes for the broad categories into which a property might be defined. Along with Property Type, it defines different types of property that can be issued to an employee (i.e., car phone, office key, etc.). This is entered in the **Property** function. If an employee is terminated through **Terminate Employee** and unreturned property is detected, the system will display those items.

**PROPERTY TYPE:** These are codes for the different types of property that can be issued to an employee (i.e., car phone, office key, etc.). This is entered in the **Property** function. If an employee is terminated through **Terminate Employee** and unreturned property is detected, the system will display those items.

**QUALIFYING STATUS:** These are codes for the reason why a person is qualified for COBRA.

**RACE CODES:** These are codes for the different races associated with an employee or applicant. Race is entered in **Add Employee, New Hire** or **Demographics**. The **EEO-1 Report** gives the number of employees by race. Required values are those specified by the Equal Employment Opportunity Commission.

Required values: "A" (Asian), "B" (Black or African American), "H" (Hispanic or Latino), "I" (American Indian/Alaskan Native), "P" (Native Hawaiian or other Pacific Islander), "T" (Two or more races) and "W" (White)

**RATE INDEX:** These are codes which represent rate indexes, used in conjunction with job classes and job grades to specify pay rates for a group of employees. An employee's salary can be entered in the **Salary Change** function as (1) a standard amount, (2) an hourly amount by job title, or (3) a job class and job grade within a rate index. The rate index holds the hourly rates by class and grade, and can be viewed or changed in **Salary Change**. The **Salary History** function

stores changes in rate indexes. Step progressions may be used when an employee is paid a different based on the number of hours worked in that class/grade. Rates are entered in **Rate Indexes**.

**REASON FOR POSITION:** These codes describe the reason why an employee was assigned, transferred, or removed from a position. When an employee is assigned to a position through **Position Assignment**, a reason must be entered. This is then stored in **Work History** with other position information. The **Transfer Employee** function also requires that a reason be entered. When making changes through the **Employee Positions** function, reasons are entered. The **Employee Profile Report** prints this information.

Required value: NEW (this code is written to **Work History** when adding a new employee and entering a job title in **Add Employee** or **New Hire**).

Field: Position Deletion

**REFERENCE TYPE:** This code describes reference that was contacted to determine a job candidate's qualifications. Example of a reference type would be supervisor, business associate, character reference, etc. Results of reference checks are entered in the **Pre-Hire References** function, or through the **Pre-Hire Tracking** window if the Applicant Stage Code has been defined as a reference. Questions from the **Reference Question Builder** can be displayed and the reference's answers can be recorded. The **Open Selected Reference** function will be active if a document name has been entered in the Sample Reference Questions field.

Field:

Sample Reference Questions (11 A/N): Enter document name which will be accessed in the Open Selected Reference window, based on the drive/library path in **Directory Defaults** in the References Path field.

**RELATIONSHIP TYPE:** These codes describe the relationship between two people. It is used throughout the system in the following areas: **Benefit Enrollment** (for employee's relationship to dependents and beneficiaries), **Employee Claims** (for relationship to dependent), **Dependents**, **Add Employee**, **New Hire** and **Emergency Contacts** (relationship to emergency contact) and **Previous Employment** (relationship to reference). In Employee Services, relationship types defined as Dependent will be available for selection when adding dependents in **First Time Enrollment**, **Life Events** and **Open Enrollment**. All relationship types will be available for selection when adding beneficiaries. This also applies to the **Open Enrollment** function in Manager Services.

Fields:

Spouse (used with Coverage Lists to restrict dependent selection in on-line enrollment)

Child (used with Coverage Lists to restrict dependent selection in on-line enrollment)

Dependent (used to restrict the types that may be added as dependents in on-line enrollment)

**REQUISITION COST TYPE:** The type of cost associated with a requisition is stored in this table. Costs such as newspaper advertisement and recruitment fees are entered in the **Requisition Cost** function.

**REQUISITION REASON:** This table stores reasons that a requisition was created. This information is entered through the **Requisition Worksheet** function.

**REVIEW RATING:** The rating which an employee receives at the time of his/her review is stored in this table. The rating could be numerical, or descriptive such as “Exceptional” or “Meets Job Requirements”. Review ratings are entered through the **Job Reviews** function.

**REVIEW TYPE:** This table stores the various types of reviews that are given to employees. Example of review types would be annual review, performance review, salary review, etc. Review types are entered through the **Job Reviews** function.

**ROUNDING INDEX:** These are codes for the different ways in which a benefit coverage amount is rounded, for example to the next \$1000. The rounding index is entered in **Benefit Plans**. When an employee is enrolled in a benefit through **Benefit Enrollment**, the rounding index, if any, is used to determine the amount of coverage that the employee will receive.  
Fields:

Coverage Rounding Amount (6N): Enter the amount by which to round

Round Up (Y/N): Enter “Y” to round up to the next Coverage Rounding Amount, or “N” to round down.

**SALARY CHANGE REASONS:** When a change is made to employee salary information in **Salary Change**, the user will be required to enter a salary change reason. This will describe why the change was made, for example, an annual increase, a merit raise, etc. This information can be viewed in the **Salary History** function. The **Employee Profile Report** will print employee salary data.

**SALARY CLASSES:** A salary class is used in conjunction with a salary grade. With these two values, a salary range is assigned a minimum and maximum salary amount. They are defined within a Salary Range Model and Year in the **Salary Ranges** function. A salary class and grade may be associated with a position through **Position Control**. Minimum and maximum salary range values displayed in Position Control. **Salary History** stores changes to an employee’s salary classes.

**SALARY GRADES:** A salary grade is used in conjunction with a salary class. With these two values, a salary range is assigned a minimum and maximum salary amount. They are defined within a Salary Range Model and Year in the **Salary Ranges** function. A salary class and grade may be associated with a position through **Position Control**. Minimum and maximum salary range values displayed in Position Control. **Salary History** stores changes to an employee’s salary grades.

**SALARY RANGE MODELS:** These are codes for the different types of models that store salary classes and grades and their associated dollar values. Salary range models are entered, by year, in **Salary Ranges**. A salary class and grade is then entered with an associated salary range containing a minimum and maximum amount. A salary class and grade may be associated with a position through **Position Control**. Minimum and maximum salary range values displayed in

Position Control. When calculating salary ranges, model “Rg001” is used as the “live” model. If job evaluation points are not entered for a position, the system will use the salary class and grade that is defined in Position Control when calculating the position’s salary range. The employee’s position in range is calculated and displayed in **Salary History**. The salary range calculated for job evaluation points is printed on the **Employee Profile Report**.

Required value: “Rg001” (live, or current, model)

**SALUTATIONS:** These are codes for the different titles associated with an employee (i.e., Mr., Mrs., etc.)

**SECURITY CLASS:** These are codes which represent an additional level of user authorization by organization level. A security class can be entered in **Add Employee, New Hire** or **Work Profile**. In **Organization Security**, user authorization can be defined by up to seven levels of organization, in conjunction with security class. A user can be restricted from a particular security class, or be authorized to employees within the class.

**SEPARATION REASONS:** These codes represent reasons why an employee left the company. It is entered in the **Exit Interview** function, accessed separately or through **Terminate Employee**.

**SHIFT CODES:** These are codes for the different types of shifts employees may work (i.e., day shift, night shift, etc.) An employee’s “regular” shift is entered on the **Add Employee, New Hire** or **Work Profile** function. Rate differentials by shift are entered in **Rate Indexes**. For an employee to be paid the shift differential, it must be entered in **Time and Attendance** functions, **Manual Payment** or **Lump Sums**.

Values: 3 A/N

**SKILL GROUPS:** These are codes which represent the second of three fields which define a skill that a person might have. A code from this table is used in conjunction with a code from both the Skills table and Skill Level table to provide a full description of the skill in the **Skills Definition** function. Skills that people possess may be recorded in **Skills**. Skills are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.

**SKILL LEVELS:** These are codes which represent the third of three fields which define a skill that a person might have. A code from this table is used in conjunction with a code from both the Skills table and Skill Group table to provide a full description of the skill in the **Skills Definition** function. Skills that people possess may be recorded in **Skills**. Skills are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.

**SKILLS:** These are codes which represent the basic skill that a person might have. A code from this table is used in conjunction with a code from both the Skill Group table and Skill Level table to provide a full description of the skill in the **Skills Definition** function. Skills that people possess may be recorded in **Skills**. Skills are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.



**SPECIAL RATES:** These are codes for the different types of rates that an employee may be paid (overtime, on call pay, etc.). When a special rate is entered in **Time and Attendance** functions, **Manual Payment** or **Lump Sum**, the definition supplied in either the **Rate Indexes** or this COD table will be used to calculate an hourly pay amount.

**STATE CODES:** These codes represent the two-character abbreviations for states as defined by the U.S. Postal Service. They are used in the following functions: **Add Employee, New Hire, Demographics, Address, Agency Information, Dependents, Medical Visits, Injuries, Previous Employment, Organization Setup** and **Training Facilities**. Payroll processing uses state codes for **Payroll Activation, Tax Manager, Tax Elections, SUI + W-2 Manager, Employee Locations, SUI Quarterly Report, SUI Magnetic Data Generation, SUI Diskette Data Inquiry, SUI Diskettes Creation, Quarterly State Income Tax Report, Quarterly Disability Report, Quarterly Local Tax Report, W-2 Additional State Taxes, W-2 Data Generation, W-2 Diskette Inquiry, W-2 Diskette Creation** and **W-2 Register**.

Fields:

Allow SIT Assignment to Work State: If this checkbox is “yes”, and an employee’s Work State entered in Payroll Activation Process differs from his/her residence state (the active Mailing Address from Employee Addresses), the system will automatically assign the state income tax for the Work State. If this checkbox is “no”, the state income tax will be assigned for the Residence State.

Additional SUI Code #1: If information other than the standard data found in SUI + W-2 Manager, Entity State Requirements section, is required by the state when creating the quarterly wage diskette, enter the name of the field here. Define the field length in the SUI Code #1 Format field. When creating SUI diskettes, information in the corresponding fields in SUI + W-2 Manager are written to the diskette. The current specifications for each state have been used.

Formats in Additional SUI Code #1 and Code #2 are set up to correspond with these specifications, and should not be changed unless you are instructed by Software Plus to do so.

Addition SUI Code #2: If further information other than the standard data found in SUI + W-2 Manager, Entity State Requirements section, is required by the state when creating the quarterly wage diskette, enter the name of the field here. Define the field length in the SUI Code #2 Format field. When creating SUI diskettes, information in the corresponding fields in SUI + W-2 Manager are written to the diskette. The current specifications for each state have been used.

Formats in Additional SUI Code #1 and Code #2 are set up to correspond with these specifications, and should not be changed unless you are instructed by Software Plus to do so.

SUI Code #1 Format: This field defines the format of the field described in Addition SUI Code #1. A “9” represents a numeric digit 0 through 9, and an “x” represents an alpha-numeric character. Any other character, such as a dash “-“ or slash “/” will be displayed as is. A six digit field would be defined here as 999999; a six-character field would be defined as xxxxxx. This field should only be changed according to state instructions.

SUI Code #2 Format: This field defines the format of the field described in Addition SUI Code #2. A “9” represents a numeric digit 0 through 9, and an “x” represents an alpha-numeric character. Any other character, such as a dash “-“ or slash “/” will be displayed as is. A six-digit field would be defined here as 999999; a six-character field would be defined as xxxxxx. This field should only be changed according to state instructions.

State Account Number Format: If anything exists here, it will determine the format of the State Unemployment ID# field in the Entity State Requirements section of SUI Manager. . A “9” represents a numeric digit 0 through 9, and an “x” represents an alpha-numeric character. Any other character, such as a dash “-“ or slash “/” will be displayed as is. Since some states have requirements for the format of the account number, this feature will ensure that the number is entered properly for each legal entity. For example, a state may have a six-digit account number with a check digit, separated by a dash. This field would then contain 999999-9.

Location Number Format: The entry in this field will determine the format of the SUI Location field in the Location Maintenance section of SUI + W-2 Manager. A “9” represents a numeric digit 0 through 9, and an “x” represents an alpha-numeric character. Any other character, such as a dash “-“ or slash “/” will be displayed as is. For example, a 3-digit plant number assigned by the state would be formatted as 999; a 3-character unit number would be formatted as xxx.

Required values: Blank. No other values are required, however states that are entered must have the correct two-character code so that payroll reporting can be run correctly for each state’s requirements:

AK	ALASKA
AL	ALABAMA
AR	ARKANSAS
AZ	ARIZONA
CA	CALIFORNIA
CO	COLORADO
CT	CONNECTICUT
DC	WASHINGTON, D.C.
DE	DELAWARE
FL	FLORIDA
GA	GEORGIA
HI	HAWAII
IA	IOWA
ID	IDAHO
IL	ILLINOIS
IN	INDIANA
KS	KANSAS
KY	KENTUCKY
LA	LOUISIANA
MA	MASSACHUSETTS
MD	MARYLAND
ME	MAINE
MI	MICHIGAN
MN	MINNESOTA
MO	MISSOURI
MS	MISSISSIPPI
MT	MONTANA
NC	NORTH CAROLINA
ND	NORTH DAKOTA
NE	NEBRASKA

NH	NEW HAMPSHIRE
NJ	NEW JERSEY
NM	NEW MEXICO
NV	NEVADA
NY	NEW YORK
OH	OHIO
OK	OKLAHOMA
OR	OREGON
PA	PENNSYLVANIA
PR	PUERTO RICO
RI	RHODE ISLAND
SC	SOUTH CAROLINA
SD	SOUTH DAKOTA
TN	TENNESSEE
TX	TEXAS
UT	UTAH
VA	VIRGINIA
VT	VERMONT
WA	WASHINGTON
WI	WISCONSIN
WV	WEST VIRGINIA
WY	WYOMING

**STATUS CHANGE REASON:** These are codes for the different reasons why an employee's status has changed (i.e., promoted, demoted, etc.). They are entered in **Add Employee, New Hire, Transfer Employee, Employment Status, Status History, and Terminate Employee.**

**TEST SERVICES:** These are codes for the different types of companies which conduct employment tests for candidates who have applied for an open position. Tests that are administered by these services are entered in the **Test Services** function. Areas of testing are entered in the **Test Category Builder** within this function. **Pre-Hire Testing** holds the results of the tests for each candidate.

**TEST TYPE:** These codes represent the different types of tests that are administered by a test service. The tests are given to candidates who are applying for a position within the company. Test types are added in **Test Services**. Results of each test are stored by candidate in the **Pre-Hire Testing** function.

**TRADE OR CRAFT FOR APPRENTICE:** These are codes for trades, or crafts, for which a job services as an apprenticeship. The trade or craft is entered in **Job Titles**. It is used when printing the **EEO-2 Report**. If a job title contains a trade or craft, any changes that occur in an employee's position will prompt the user for a reason applicable to the EEO-2 Report. This can be viewed in **Work History**.

**TRAINING CLASS:** These are codes for the different training classes that an employee might attend. The Training Class is used in conjunction with a Training Group and Training Type to further define the type of training. Classes are set up in **Training Definition**. Training classes that people have completed may be recorded in **Training Information**. Training classes are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.

**TRAINING GROUP:** These are codes which group different training classes together, for example, computer training, sales training, etc. The Training Group is used in conjunction with a Training Class and Training Type to further define the type of training. Classes are set up in **Training Definition**. Training classes that people have completed may be recorded in **Training Information**. Training classes are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.

**TRAINING MATERIAL CODES:** In the expanded training module, training materials can be associated with a training course. These would be items such as overhead projector, workbooks, etc., which are used within the course. They are entered in the **Training Course Administration** function, and reserved in the **Training Schedule** function.

**TRAINING TYPES:** These are codes for the different types of training classes that an employee might attend. The Training Type is used in conjunction with a Training Class and Training Type to further define the type of training. Classes are set up in **Training Definition**. Training classes that people have completed may be recorded in **Training Information**. Training classes are also associated with a job title, and therefore with a position, by linking them through the **Job Titles** function.

**UNIT OF TIME CODES:** These codes represent the frequency per year in which an event will occur, for example, monthly, quarterly, etc. The code must be entered as the actual number per year, such as “04” for quarterly. The codes are used for benefit costing purposes in **Benefit Plans** and for calculating benefits costs in **Benefit Enrollment**.

**USER BENEFIT COVERAGE METHODS:** In **Benefit Plans**, you may define alternate methods of calculating employee benefit coverages. If you choose the “Other” Coverage Calculation Method, you can specify a user exit. The User Benefit Coverage Method value must have a corresponding program (xxxxxxx.p). When an employee is enrolled in this benefit, the system will use your customized program to calculate benefit coverage. Two standard fields are provided for use with your program; one appears in the Employer Benefit Plans function, and one appears in the enrollment function.

Required value: BCVGGTLI (This has been programmed to be a multiplier of the employee’s previous year’s non-imputed income. Program BCVGGTLI.p performs the calculations based on the multiplier you specify in Employer Benefit Plans. The system accumulates all year-to-date amounts from Pay Distribution where the Reverse Deduction is blank, and the legal entity is the one associated with the employee’s home organization (Level 2), and the tax year is the year prior to the coverage date year in process.)

Fields:

Use Employee Value: yes/no. If Yes, an additional field will appear in the Update window of either Benefit Enrollment or Flex Benefit Enrollment. The field name is specified in Employee Value Description.

Use Employer Value: yes/no. If Yes, an additional field will appear in the Add and Update windows of Employer Benefit Plans. The field name is specified in Employer Value Description.

Employee Value Description: If “Use Employee Value” is Yes, enter the field name that corresponds to this information.

Employer Value Description: If “Use Employer Value” is Yes, enter the field name that corresponds to this information.

**VENDOR CODES:** These are codes for various companies which supply training-related services. If an outside vendor supplies the actual training class, it would be associated with that class through **Training Course Administration**. If you use another company’s facilities for the class, it would be entered in **Training Facilities**. If additional costs are incurred, the vendor and corresponding data would be entered in **Training Schedule**.

**VETERAN STATUS:** These are codes for the different types of veteran statuses (i.e., honorable discharge, disabled, etc.). They are entered in **Add Employee, New Hire** and **Demographics**.

**VETS-100 Data Generation** uses this information.

Required values:

- 1 (other protected veteran)
- 2 (Vietnam era and other protected veteran )
- 3 (special disabled and other protected veteran )
- 4 (Vietnam era, special disabled and other protected veteran )
- 5 (newly separated and other protected veteran)
- 6 (newly separated, special disabled and Vietnam era veteran)
- 7 (newly separated, Vietnam era and other protected veteran)
- 8 (newly separated, special disabled and other protected veteran)
- 9 (newly separated, special disabled, Vietnam era and other protected veteran)
- B (special disabled Vietnam era veteran)
- P (newly separated and special disabled veteran)
- Q (newly separated veteran)
- R (newly separated and Vietnam era veteran)
- S (special disabled veteran)
- V (Vietnam era veteran)

**VETERAN STATUS (VETS-100A):** These are codes for the different types of veteran statuses for VETS-100A reporting purposes. They are entered in **Add Employee, New Hire** and **Demographics**. The VETS-100A Report, submitted from **VETS-100 Data Generation**, uses this information.

Required values:

- D (disabled veteran)
- DE (disabled veteran and other protected veteran)
- DEB (disabled veteran, other protected veteran, Armed Forces Service Medal veteran and recently separated veteran)

DEM (disabled veteran, other protected veteran, Armed Forces Service Medal veteran)  
DEO (disabled veteran, other protected veteran, recently separated veteran)  
DM (disabled veteran, Armed Forces Service Medal veteran)  
DO (disabled veteran, recently separated veteran)  
E (other protected veteran)  
EM (other protected veteran, Armed Forces Services Medal veteran)  
EMO (other protected veteran, Armed Forces Services Medal veteran, recently separated veteran)  
EO (other protected veteran, recently separated veteran)  
M (Armed Forces Services Medal veteran)  
MO (Armed Forces Services Medal veteran, recently separated veteran)  
O (recently separated veteran)

**VETERAN STATUS (VETS-4212):** These are codes for the different types of veteran statuses for VETS-4212 reporting purposes. They are entered in **Add Employee, New Hire** and **Demographics**. The reporting for VETS-4212 will be released in a future update once the government requirements are finalized.

Required values:

B	Wartime or Campaign Badge
BM	Badge/Medal
D	Disabled Veteran
DB	Dis/Badge
DBM	Dis/Badge/Medal
DM	Dis/Medal
DS	Dis/RecSep
DSB	Dis/RecSep/Badge
DSBM	Dis/RecSep/Badge/Medal
DSM	Dis/RecSep/Medal
M	AFS Medal Veteran
N	Not Protected Veteran
P	Protected Veteran
S	Recently Separated Vet
SB	RecSep/Badge
SBM	RecSep/Badge/Medal
SM	RecSep/Medal

**WFM SECURITY ROLE:** These are codes representing an employee's security role in the Workforce Management module. These codes are to be used if you have instructed to do so by the Workforce Management Technical Support staff.

**WFM WORK SCHEDULE:** These are codes representing an employee's work schedule in the Workforce Management module. These codes are to be used if you have instructed to do so by the Workforce Management Technical Support staff.

**WORK ENVIRONMENT DEFINITION:** These are codes for the different types of work environments that will be encountered within a job position. It is associated with a category, which can be accessed through the **Work Environment Definition** option. When the **Physical and Environmental Job Requirements** option is accessed, the Work Environment Category is selected. Work Environments can then be selected on the Available Working Environment window and associated with the job title.

Field:

Category (4A): The category code from Work Environment Categories is entered here.

**WORKER'S COMPENSATION CODES:** These are codes for the different job risk classes, which determine worker's compensation insurance rates that are collected by the state. A worker's compensation code is associated with **Job Titles**. When a job title is linked to a position, the code from the job title record is brought into the **Position Control** record, where it can be overridden if necessary.

**YEAR SEGMENTS:** (not used in the package)