



## **Unicorn HRO**

# **Human Resources Procedures**

## ADD AN ORGANIZATION UNIT (DEPARTMENT, LOCATION, ETC.)

Step	Function	Optional/ Mandatory	Action
1	Organization Level Description	Optional	If the new unit does not apply to an existing organization level, you may need to add another level. You can use up to 7 organization levels. You may also use the Security Class field in Employee Direct as an extra “level” for security purposes.
2	Organization Setup	Mandatory	Define the new unit within the appropriate level of organization. If this unit represents a location or establishment that will be reporting EEO-1 or VETS-100 information, make sure that it is entered in the same level as your other locations. Enter the applicable information in the EEO Setup screen.
3	HR Common Object Dictionary	Optional	If you will be using Security Classes as part of your security set-up, enter them in the common object called Security Class. Each class can be separately defined in Organization Security, and employees can be assigned to a class in Employee Direct.
4	Organization Security	Optional	If necessary, add separate records for users who will be authorized to access data in this unit.
5	SUI and W-2 Manager	Optional	If the new unit represents a geographic location, and you have been assigned location numbers by your state unemployment department, add the location to the SUI Locations section of this function.
6	SUI and W-2 Manager	Optional	To assign employees to the new SUI Location, use the Employee Locations section of this function.
7	HR Common Object Dictionary	Optional	If you use salary ranges, enter any new values in common objects Salary Range Models, Salary Grades and Salary Classes.
8	Salary Ranges	Optional	Enter salary ranges.
9	HR Common Object Dictionary	Optional	If you use job evaluation points, enter any new values in Job Evaluation Point Models.
10	Job Evaluation Point Definition	Optional	Enter job point definitions.
11	Job Title Information	Optional	Enter any new job titles that will be used.
12	Position Control	Optional	Enter positions in Position Control.
13	Employee Direct or Employee Positions	Mandatory	Add/transfer employees to new organization. If you use Employee Positions, make sure you select “Update Primary Position” so that the organization and job title in Employee Direct are also changed.

## ADD A BENEFIT GROUP OR PLAN

Step	Function	Optional/ Mandatory	Action
1	HR Common Object Dictionary	Optional	If the plan will be assigned to a new benefit group, enter the group in common object Benefit Group. If the group contains flexible, or cafeteria-style benefits, select the Flexible Benefit Group checkbox. Otherwise, leave this field blank.
2	HR Common Object Dictionary	Optional	If a new benefit plan is needed, add it to the Benefit Plans common object.
3	HR Common Object Dictionary	Optional	If a new benefit option is needed, add it to the Benefit Options common object.
4	HR Common Object Dictionary	Optional	If a new benefit carrier is needed, add it to the Benefit Carriers common object.
5	HR Common Object Dictionary	Optional	If a new coverage category is needed, add it to the Benefit Category common object.
6	HR Common Object Dictionary	Optional	If a new rounding option is needed, add it to the Rounding Index common object.
7	Date Rounding Formula	Optional	If a new date rounding formula is needed, enter it here.
8	HR Common Object Dictionary	Optional	If a new deduction is needed, either for employee-paid or employer-paid amounts, add it to the Payroll Deductions common object.
9	Deduction Definition	Optional	If deductions were added in the previous step, set them up in this function for all deduction groups that will be using them.
10	Employer Deduction Contributions	Optional	If deductions were added in Step 8, set them up in this function for each legal entity to which they apply. Make sure you enter the G/L Account Number.
11	Deduction Taxation Exemptions	Optional	If the deduction is pre-tax, set up the taxation rules in this function.
12	Deduction Pay Exclusions	Optional	If the deduction should not be taken from certain pay types, enter them here.
13	Employer Benefit Plans	Mandatory	Add the benefit plan to the appropriate benefit group.
14	Employee Direct	Optional	If applicable, change the employee's benefit group in Employee Direct.
15	Employee Benefit Groups	Optional	Enroll employees in the plan. This will automatically create employee deductions, employer deductions, or both, depending on how you set up the plan.

## ADD A FLEXIBLE SPENDING ACCOUNT

Step	Function	Optional/ Mandatory	Action
1	HR Common Object Dictionary	Optional	If the plan will be assigned to a new flexible spending account group, enter the group in common object FSA Group.
2	HR Common Object Dictionary	Optional	If a new FSA is needed, add it to the Flexible Spending Accounts common object.
3	HR Common Object Dictionary	Optional	If a new deduction is needed, add it to the Payroll Deductions common object.
4	Deduction Definition	Optional	If deductions were added in the previous step, set them up in this function for all deduction groups that will be using them.
5	Employer Deduction Contributions	Optional	If deductions were added in Step 3, set them up in this function for each legal entity to which they apply. Make sure you enter the G/L account number.
6	Deduction Taxation Exemptions	Optional	If the deductions are pre-tax, set up the taxation rules in this function.
7	Deduction Pay Exclusions	Optional	If the deductions are exempt from any pay types, enter them here.
8	Flexible Spending Account Plans	Mandatory	Add the FSA to the appropriate group.
9	Employee Direct	Optional	If applicable, change the employee's FSA group in Employee Direct.
10	Flexible Spending Accounts	Optional	Enroll employees in the FSA. This will automatically create a payroll deduction based on the employee's Planned Contribution and number of pay periods remaining in the year.