Fidelity 401k Eligibility

Interface Requirements Specification

# Fiskars Living

# Contact Information

## Customer Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Tel** | **Email** |
| Glenn Smith |  | glenn.smith@fiskars.com |

## Vendor Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Tel** | **Email** |
|  |  |  |

## Integration Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Tel** | **Email** |
| Lea King |  | lking@tekpartners.com |

# Revision History

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Date** | **Version** | **Revision Description** | **Comments** | **Author** |
| **1** | 05/06/2021 | 1.0 | Initial Draft |  | Lea King |
| **2** |  |  |  |  |  |
| **3** |  |  |  |  |  |
| **4** |  |  |  |  |  |

# 

# File Information

|  |  |  |  |
| --- | --- | --- | --- |
| **File Type** | Space delimited | **Output Type** |  |
| **Interface Decommissioning** | Are there current / otherinterfaces that this interface is replacing?):  ☐ No | **File Name** |  |
| **Frequency** | Weekly | | |
| **Is automated Transmission required?** | ☐ Yes |  |  |
| **Export Selection Criteria Functionality** | **Select all that apply:** | **Qualifier Notes:** | |
| ☐ Pay Period Range |  | |

# Business Rules - Customer Confirmation

401k

1. Vendor Name:  
   Fidelity
2. Confirm Group or Plan Number: 00088
3. Type of 401K File

|  |  |  |
| --- | --- | --- |
| Type | Employees to Include | Notes |
| **Enrollment** Employees on applicable ded codes  *This file typically will include All Employees Enrolled in the plan whether they contribute or not.* | | |

1. Will you have employees that have active Deductions in multiple component companies?

☐ No

1. Are there any Employee Types, Pay Groups, Org Levels, etc. that need to be excluded?

☐ Yes

If Yes, please list field and values to exclude or include *(whichever is a shorter list)*:

Groups to exclude eecemptype = TES

1. UltiPro Deduction Codes:

**Code**

L401P = 401K contribution %

LROTH = Roth %

401CU = 401k Catch Up

L401M = 401k match

Loan1 = 401k loan 1

Loan2 = 401k loan 2

Loan3 = 401k loan 3

# Business Rules - Vendor Confirmation

401k

1. **Confirm how you would like to send termination of coverage on this file:**

**☐Terminations sent one time only - based on the actual (audit) date entered into UltiPro.**

Click or tap here to enter text.

# Notes to Developer

File will be for the Fiskars Living company only.

This is a new company being built in UKG.

Employee data will be loaded in the client’s test site around 5/17.