

**Matrix Absence Management**

**HR Data**

**Standard Disability / FMLA/LOA Specification**

**File Specification**

* Please review the entire document prior to the initial data file review meeting.
* The data file review meeting requires at least one 90-minute review session with key client contacts and the party

responsible for the building and development of the file.

* The specifications in this document will be reviewed and finalized specification

document provided within 3 business days.

* Client is required to pass all fields based on sold product lines, fields that are not applicable based on business need

are to be passed as blank.

* Client key reminder items highlight within the document.

**Take Away List From Initial File Review:**

* **< >**
* **< >**
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* **< >**
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| **Account Specific Note Type** | **Account Specific Detail** | **Additional Comments:** |
| **Client Effective Date:** | 06/01/2020 |  |
| **Eligibility Types Passing:**  STD / LTD / FMLA | STD, LTD, FMLA/State |  |
| **File Submission Name:**  - Name cannot contain spaces. | Testing = Test\_  Test\_Midwestdental\_mmddyyyy.txt  Production =  Midwestdental\_mmddyyyy.txt | ABC\_Corporation\_mmddyyyy.txt  Test file naming is the production file submission name with the word Test\_ in front of the name.  Test\_ABC\_Corporation\_mmddyyyy.txt |
| **Approximate number of records in the file** | 2,230 |  |
| **Frequency of Data File** | Preferred Weekly | Weekly or Bi-weekly |
| **File Submission –** Internal or Vendor, if vendor name | Ulti Pro |  |
| **File Submission Method:**   * SFTP / eServices * Confirm Global IP Address for Testing and Production Files (may be a range if necessary) | SFTP or eServices  Global IP Address:  Test –  Production - | No IP Address is needed if eServices  Global IP Addresses are needed to white list for SFTP delivery of the file. This allows additional security measures as all other IP addresses not white listed do not have access to the SFTP site. |
| **PGP Encryption:** (Yes or No) |  |  |
| **File Format Type:**  Pipe / Tab / CSV / Excel | Preferred Pipe | Date the file transmission details provided: |
| **Required Test File #1 Due Date:** | Due Date: 03/30/2020 | Date Submitted: |
| **Required Production File Due Date:** | Due Date: 04/13/2020 | Date Submitted: |
| **Confirmation of Salary Process:** All files with any component of Matrix administered Check Cutting or Advice-to-Pay with Calculations requires confirmation of salary. | Required for all ATP with Calc. and Check Cutting Clients | Salary confirmation completed by:  Date Confirmed:  Required for all ATP with Calc. & Check Cutting clients |
| **Post Effective Date Salary Claims Confirmation Process:**  All files with any component of Matrix administered Check Cutting or Advice-to-Pay with Calculations requires confirmation of salary on Initial 5-10 claims and semiannual review. | Required for all ATP with Calc. and Check Cutting Clients | Salary confirmation completed by:  Date confirmed:  Required for all ATP with Calc. & Check Cutting clients |
| **Eligibility File Confirmation Process:**  email address required |  | File notifications emailed at time of file receipt and once file upload has been confirmed. |
| **Eligibility Feed Labeling** | Required for all Sub Group & Add Data fields include in this document. | Matrix set up administrative function completed the implementation unit. |
| **Eligibility file changes and/or updates** | Changes and/or updates to the eligibility file after finalization may be subject to additional programming fees. See Administrative Services Agreement for additional details. | |
| **Contact Details** | | |
| **RSL/Matrix Account Manager:**  **Key contacts for all eligibility file and Data file related questions.** | **Account Manager Email: Saskia.Barylak@rsli.com**  **Telephone:** | |
| **Implementation Manager Email: Michelle.Williams@rsli.com**  **Telephone** | |
| **Person responsible for production Data file:**  **External/Vendor or Internal** | **Lead IT Email Address:**  **Telephone:** | |

**Document Aim**

This document provides a definition of the Matrix process, file layout specification and transmission protocol for HR (demographic) data. The document will provide an insight into what information is required and why certain elements are mandatory. This document contains the technical specification and layout of the standard Matrix Absence Management, Inc. HR data file. The goal of this document is be self-explanatory to both business and technical consumers.

**Intended Audience**

This document is intended for business users and those performing HR data extracts.

# File Transmission Detail

There are 2 methods that a client can use to transmit data to Matrix. Only one method of transmission can be used, if the client wants to change the transport mechanism then matrix must be informed or this will result in data not be loaded. Option election will be noted under Account Specific details and on the preference pages of this document.

**Option #1** SFTP encrypted with or without PGP encryption

* + - The Matrix server is configured for SFTP
    - **SFTP file:** File can be transferred using the “SFTP” mechanism. Matrix will provide a PGP key (as needed).
    - You will be provide with an account ID and password, the site is s[ftp.matrixcos.com](ftp://ftp.matrixcos.com)
    - File to be passed in **binary mode** using **Port 22**

**Option #2** Upload via our (Secure Website) https web site with or without PGP

* + - The client/vendor contact must have an eServices login before this method can be used

# File Formats

1. **Most Preferred file format:** Pipe delimited text
2. **Next recommended file format**: Tab delimited text
3. **Matrix can accept also these formats with these conditions**:
   * Comma Separated (CSV) – File cannot contain comma within the data elements (files containing additional commas in the layout will fail to load). Most common issues are found when passing in salary fields on the file.
   * Excel File – Cannot be password protected (’97 – 2007 software versions) Most common issues are in the layout fields when setting up the file, leading zeros being dropped for fields as a result of incorrect format on the file.

# File Rules

* Test Files **must** be representative of the actual production data in terms of its diversity and in particular the maximum length of the data

elements. **Test files should not contain manufactured “Dummy” data**.

* When submitting data files, a **full** file is **required** each time and **not** a change file.
* The data feed cannot contain any special characters.
* The File Name cannot contain spaces.
* Only one file can be submitted per day.

## Matrix Responsibilities

* Establish an SFTP or eServices account for file transmission and provide the Matrix Public PGP Key if needed
* Perform decryption of data from encrypted files
* Perform mapping from client format to Matrix Standard format
* Perform test loads and notify success or failure status to the clients
* Perform on-going data loading of the client’s data file.

## Client Responsibilities

* Provide a layout document for the data file being sent to Matrix a header row is not included, which clearly identifies the data elements in the file and the order number in which they will be received on the file. This document should also include a description of what the data elements represent.
  + The client must supply any reference data that is required for conversion of data elements within the file
  + Client must supply the number of data elements being supplied.
* Should it be necessary to change the data file specification in terms of its layout then Matrix must be notified prior to the amended file being transmitted.
* Supply the name of the file to be sent to Matrix, for both test and production files. Naming convention must remain constant. If the file names are changed without notification to Matrix this will prevent the file from being loaded.
* Provide all information in the Client Preferences section of this document and return to Account Manager.
* If anything changes within the Client Preferences then Matrix must be notified, as technical changes will prevent HR data from loading.
* Please use binary mode when transferring files via SFTP.
* Once a client goes live with Matrix - any testing for new fields, data changes or system/vendor changes will be subject to programming fees.

## Testing Specific Process Reminders:

* Initial test file is required **eight weeks** prior to a client’s effective date.
* All files require header fields, if no headers fields are included Matrix requires a field ordering key prior to testing.
* Test date must be representative of production type data, this data can be generated from a client’s test environment.
* File must be submitted through the agreed upon submission method and in the format agreed.
* Matrix will map and test data once received and takes **seven to ten** business days.
* Matrix requires a second test file be submitted with **true production data**, if that file tests correctly it will be loaded to production.
* FMLA/Leave administered clients are required to have a production file in place not less than **five weeks** prior to the effective date.
* Disability only clients are required to have a production file in place no later than **three weeks** prior to the effective date.

# Timing of Key Components

|  |  |  |  |
| --- | --- | --- | --- |
| **Implementation Activity** | **Client Responsibility** | **Matrix Responsibility** | |
| HR data feed – test file #1 submission | At least 6-8 weeks prior to go-live | Turnaround time 7 -10 business days | |
| HR data feed – test file #2 and #3 (if applicable) | 5 to 6 weeks prior to go-live date | Turnaround time 3-5 business days | |
| HR data questions or clarification | Response from client within 2 business days from notification by Matrix | Matrix updates dates within 2-3 days for processing of second client test file | |
| HR data production file requirements: (Failure to meet these requirements delay a client effective date) | Disability only administration 3 weeks before go-live.  Disability administration with takeover or historical data transfer requirements 5 weeks before go-live (Eligibility must be loaded prior to loading takeover or historical data)  FMLA/Leave administration only 4 weeks before go-live.  Disability/FMLA/Leave administration 5 weeks before go-live with or without historical data transfer (Eligibility must be loaded prior to loading takeover or historical data) | | Turnaround time 3-5 business days |

# Data File Specification

**File Requirements:**

* **A header row is required and all fields noted below must be provided in the ordering of specification layout.**
* **File cannot contain footer row.**
* **Single line per employee record.**
* **All data must be passed within the "Maximum Length" noted by field type, otherwise truncated prior to submission.**
* **A Production File must be sent after testing is complete. Matrix will not push a Test File to Production.**

**Important Notes for Developer**

**This is a Full File**

**It is a Pipe Delimited File**

**The file must include all employees regardless if they have the STDRS and/or LTDRS deduction codes.**

**Exclude employees – with emp type = TES and employees in Pay Groups Contractors-Doctors, Contractors - Hygienists**

**Terminations should remain on the file for 30 days after termination date then drop from the file**

| **Order** | **Field Names and Labels (Client specific notes)** | **Required/Not Required** | **Intake Form**  **Format** | **Max Length** | **Description** | **UltiPro Field Mapping Notes** |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Employee Demographic Section** | | | | |  |
| 1 | Date of Birth | Required Field | MM/DD/YYYY | 10 | Employee birth date. | eepdateofbirth  Format = MM/DD/YYYY |
| 2 | Date of Hire Most Recent | Required Field | MM/DD/YYYY | 10 | Most recent date of hire (Must populate for all records with Rehire date or original date of hire) | eecdateoflasthire  Format = MM/DD/YYYY |
| 3 | Date of Hire Original | Required Field | MM/DD/YYYY | 10 | Required for LOA eligibility determination | eecdateoforiginalhire  Format = MM/DD/YYYY |
| 4 | Date of Hire Adjusted | Optional  Otherwise Blank | MM/DD/YYYY | 10 | Required if adjusted service date is benefit drive (A calculated date based on client specific factors) | Leave Blank |
| 5 | SSN | Required Field | Character | 11 | The SSN may contain dashes (not slashes) or just 9 digits  (Note: full SSN is encrypted in the system and is not displayed anywhere-only last 4 digits are displayed). This is a mandatory element. | eepssn  Format - may contain dashes (not slashes) or just 9 digits |
| 6 | Employee ID | Required Field | Character | 20 | Required to identify employees for reporting. | eepempno  Include leading zeros |
| 7 | First Name | Required Field | Character | 40 | Employee first name | eepnamefirst |
| 8 | Middle Initial | Required Field | Character | 1 | Employee middle initial | 1st digit of eepnamemiddle |
| 9 | Last Name | Required Field | Character | 40 | Employee last name | eepnamelast |
| 10 | Home Address 1 | Required Field | Character | 50 | Employee address line 1 | eepaddressline1 |
| 11 | Home Address 2 | Required Field | Character | 50 | Employee address line 2 | eepaddressline2 |
| 12 | Home Address 3 | Optional  Otherwise Blank | Character | 50 | Employee address line 3 | Leave Blank |
| 13 | Home City | Required Field | Character | 35 | Employee city | eepaddresscity |
| 14 | Home State | Required Field | Character | 2 | Employee state code. If Canadian employees will be managed by Matrix two digit providence code is required. | Eepaddressstate |
| 15 | Home Zip | Required Field | Character | 10 | Employee zip code. If Canadian employees will be managed by Matrix zip code must pass in Canadian format (ex. A9A 9A9). | Eepaddresszip |
| 16 | Home Country | Optional  Otherwise Blank | Character | 3 | Home country - pass as USA and/or CAN for Canadian employees. Both USA and CAN be passed if client will have Matrix manage Canadian employees. | Leave Blank |
| 17 | Home Phone | Optional  Otherwise Blank | Character | 25 | Employee home phone number  - Cannot accept +1 or 1 prefix | eepphonehomenumber |
| 18 | Home Email Address | Optional  Otherwise Blank | Character | 255 | Employee personal email address | eepaddressemailalternate |
| 19 | Marital Status | Required Field | Character | 10 | Employee marital status  - Can pass as single character or full word | if eepmaritalstatus = M send M  if eepmaritalstatus = S send S  Else send blank |
| 20 | Gender | Required Field | Character | 8 | Employee gender  - Can pass as single character or full word | if eepgender = F send F  if eepgender = M send M  Else send blank |
| 21 | Work State | Required Field | Character | 2 | Employee work state abbreviation. This will trigger the inclusion of state specific statutory applications in the Intake packet (NY DBL, NJ TDB, Hawaii TDI and/or CA EED. Required for LOA eligibility determination. | Locaddressstate in eeclocation |
| 22 | Work Phone  (Confirm whether number is unique to EE or not) | Optional  Otherwise Blank | Character | 25 | Employee work phone number  - Cannot accept +1 or 1 prefix | EecPhoneBusinessNumber  Send phone number if available  else Leave Blank |
| 23 | Work Email Address | Required Field | Character | 255 | Employee work email address. Must be passed for the clients supervisors and above. **Note:** Cannot be a personal email address or mix of work and personal email addresses. Unless it is all work email then must pass blank. | eepAddressEMail |
| 24 | Department Number | Required Field | Character | 20 | Department number | EecOrgLvl2  Send code not the description |
| 25 | Department / Location Name  Provide Sample | Required Field | Character | 40 | Department name - This will appear on the HR Notification as Department / Location. | LocDesc where LocCode = EecLocation |
| 26 | Location Code | Required Field | Character | 20 | Location Code | eeclocation  send code not the description |
| 27 | Location Name | Required Field | Character | 50 | Description of Location | LocDesc where LocCode = EecLocation |
| 28 | Position | Required Field | Character | 50 | Employee job title - This needs to the primary Job title for the employee. | JbcDesc where JbcCode = EecJobCode – remove any commas |
| 29 | Shift Worked | Optional  Otherwise Blank | Character | 25 | Shift worked - required if shift affects wages or benefits**.** Please provide a legend as to what the values represent For example 1,2,3. | Leave Blank |
| 30 | Is Active  Y = Is active  N = all the others | Required Field | Character | 1 | Employee status – Values will be "Y" or "N. Y should pass for anyone that is not terminated and in active status. If employee is out on LOA should pass as active. | If eecemplstatus = T send N else send Y |
| 31 | Termination Date | Required Field | MM/DD/YYYY | 10 | Termination date – Terms can be dropped or can be passed for x number of times for our reference. If termination date is passed the is Active field should be “N”  **\*Required for all FMLA/Leave of absence clients.** If not provided client is responsible for communicating to Matrix and providing termination dates for EE’s with an open leave. | If eecemplstatus = T send eecdateoftermination  Include for 30 days then drop from file |
| 32 | Is Fulltime  Y = Is Full time  N = all others | Required Field | Character | 1 | Fulltime - Values will be "Y" or "N". Fulltime status based on the client’s definition for FT employee status. | If EecFullTimeOrPartTime = F send Y else send N |
| 33 | Is Exempt  Y = Is exempt  N= Non exempt | Required Field | Character | 1 | Exempt or non-exempt - Values will be "Y" or "N", | if EjhFLSACategory = E or Z send Y else send N |
| 34 | Annual Salary | Required Field  Required For ATP Calcs. or Check Cutting | Number 16,2 | 16 | Gross pay amount - should contain decimal point even if decimal value is 00. Salary must support plan definition for salary.  - This field should not include dollar sign ($) or commas (,)  - Not applicable for FMLA/LOA only clients | EecAnnSalary |
| 35 | Hourly Rate | Required Field  Required For ATP Calcs. or Check Cutting | Number 16,2 | 16 | Hourly salary - should contain decimal point even if decimal value is 00.  - This field should not include dollar sign ($) or commas (,)  - Not applicable for FMLA/LOA only clients | EecHourlyPayRate |
| 36 | FICA Year To Date | Optional  Otherwise Blank | Number  11,2 | 16 | FICA YTD withheld - required for taxable plans Not required field for Advice to Pay clients.  - This field should contain decimal point even if decimal value is 00.  - This field should not include dollar sign ($) or commas (,) | Leave Blank |
| 37 | HR Rep Name | Passing if applicable otherwise blank | Character | 50 | HR Representatives Name (Primary HR contact) | Leave Blank |
| 38 | HR Rep Email Address | Passing if applicable otherwise blank | Character | 255 | HR Representatives email address - must be added if client wants to send communications to HR Rep (Primary HR Contact). If an alias is provided client will not have direct access to Absence Radar Calendar and access will need to be hard coded to contacts. | Leave Blank |
| 39 | HR Rep Phone | Passing if applicable otherwise blank | Character | 25 | HR Representatives phone number  - Cannot accept +1 prefix | Leave Blank |
| 40 | Supervisor Name | Passing if applicable otherwise blank | Character | 50 | Supervisor name (Primary Supervisor /Manager contact) This field filters to Intake and Absence Radar. | Eepnamefirst space eepnamelast from EecSupervisorID  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi’s name would be in this field |
| 41 | Supervisor Email Address | Required Field | Character | 255 | Supervisor email address-  **must be present to send communications to supervisor** (Direct Supervisor /Manager contact) | Eepaddressemail from EecSupervisorID  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi’s email address would be in this field |
| 42 | Supervisor Phone | Passing if applicable otherwise blank | Character | 25 | Supervisors phone number(Primary Supervisor /Manager contact). Helpful to confirm RTW of claimant.  - Cannot accept +1 prefix | EecLocation phone number from EecSupervisorID  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi’s phone number (from location record) would be in this field |
| 43 | HR Manager Name | Passing if applicable otherwise blank | Character | 50 | HR manager name (Additional HR contact). | Leave Blank |
| 44 | HR Manager Email | Passing if applicable otherwise blank | Character | 255 | HR manager email (Additional HR contact). If an alias is provided client will not have direct access to Absence Radar Calendar and access will need to be hard coded to contacts. | Leave Blank |
| 45 | HR Manager Phone | Passing if applicable otherwise blank | Character | 25 | HR manager phone (Additional HR contact)  - Cannot accept +1 prefix | Leave Blank |
| 46 | Manager Name | Passing if applicable otherwise blank | Character | 50 | Manager name (Additional Supervisor/Manager contact). | This is the employees Supervisor’s Manager  Eepnamefirst space eepnamelast from EecSupervisorID – supervisors  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi Berg’s manager is Margaret Reimer (Emp No = 005331)  Margaret’s name would be sent in this field |
| 47 | Manager Email | Passing if applicable otherwise blank | Character | 255 | Manager email address (Additional Supervisor/Manager contact). If an alias is provided client will not have direct access to Absence Radar Calendar and access will need to be hard coded to contacts. | This is the employees Supervisor’s Manager  Eepaddressemail from EecSupervisorID  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi Berg’s manager is Margaret Reimer (Emp No = 005331)  Margaret’s email address would be sent in this field |
| 48 | Manager Phone | Passing if applicable otherwise blank | Character | 25 | Manager phone (Additional Supervisor/Manager contact)  - Cannot accept +1 prefix | This is the employees Supervisor’s Manager  EecLocation phone number from EecSupervisorID  For example  Employee = Colleen Bartles (Emp No = 005002)  her Supervisor is Jodi Berg (Emp No = 005110)  Jodi Berg’s manager is Margaret Reimer (Emp No = 005331)  Margaret’s phone number (from location record) would be sent in this field |
| 49 | Sub Group A - Work State | Standard  Passing  **Work state** **Abbreviation** | Character | 2 | Client group data A; Client specific groupings- used for reporting; **This is reserved for Work state** **abbreviation**. NO SPACES WITHIN CODE PLEASE. (This is a required field for all accounts). | Locaddressstate from eeclocation |
| 50 | Sub Group B - Location Code | Standard  Passing  (Confirm Detail) | Character | 20 | Client group data B; Client specific groupings- used for reporting; **This is reserved for Location Code** (if applicable to the client)  - NO SPACES WITHIN THE CODE. | Eeclocation send description |
| 51 | Sub Group C -  (Update Label) | Standard  Passing  (Confirm Detail) | Character | 20 | Client group data C; Client specific groupings- used for reporting;  - NO SPACES WITHIN THE CODE. | EecJobCode |
| 52 | Sub Group D -  (Update Label) | Standard  Passing  (Confirm Detail) | Character | 20 | Client group data D; Client specific groupings- used for reporting;  - NO SPACES WITHIN THE CODE. | if EjhFLSACategory = E send Exempt else send Non-Exempt |
| 53 | Sub Group E -  (Update Label) | Standard  Passing  (Confirm Detail) | Character | 20 | Client group data E; Client specific groupings- used for reporting;  - NO SPACES WITHIN THE CODE. | Leave blank |
| 54 | Sub Group F -  (Update Label) | Standard  Passing  (Confirm Detail) | Character | 20 | Client group data F; Client specific groupings- used for reporting;  - NO SPACES WITHIN THE CODE. | Leave blank |
| 55 | Is STD Eligible | Required Field | Character | 1 | Plan participant - Y or N / Required for all STD clients | If EedDedCode = STDRS send Y  Else send N |
| 56 | Std Plan Effective | Required Field | MM/DD/YYYY | 10 | STD employee plan participation date - required for STD plans / Required for all STD clients.  - If above is Y a date must be provided. | EedBenStartDate |
| 57 | Is STD Supplemental Eligible (Buy Up / Supp Plan) | Passing if applicable otherwise blank | Character | 1 | Plan participant - Y or N / Required for all Supp/ Buy STD clients | Leave blank |
| 58 | Std Supp Effective | Passing if applicable otherwise blank | MM/DD/YYYY | 10 | STD-supp employee plan participation date - required for STD-supp plans / Required for all Supp/ Buy STD clients  - If above is Y a date must be provided. | Leave blank |
| 59 | Is California Voluntary Plan Eligible | Passing if applicable otherwise blank | Character | 1 | Plan participant - Y or N  If Matrix administering California Voluntary Plan (Required) | Leave blank |
| 60 | California Voluntary Plan Effective | Passing if applicable otherwise blank | MM/DD/YYYY | 10 | VP employee plan participation date - required for VP plans. If Matrix administering California Voluntary Plan (Required),  - if above is Y a date must be included | Leave blank |
| 61 | Is LTD Eligible | Passing if applicable otherwise blank | Character | 1 | Plan participant - Y or N / Required for all LTD clients | If EedDedCode = LTDRS send Y  Else send N |
| 62 | LTD Effective Date | Passing if applicable otherwise blank | MM/DD/YYYY | 10 | LTD employee plan participation date - required for LTD plans. Required for all LTD clients.  - if above is Y a date must be included | EedBenStartDate |
| 63 | Is Other Eligible (Buy Up / Supp LTD Plan) | Passing if applicable otherwise blank | Character | 1 | Plan participant - Y or N / Required for all Buy Up / Supp LTD clients | Leave blank |
| 64 | Is Other Eligible (Buy Up / Supp LTD Plan) Effective Date | Passing if applicable otherwise blank | MM/DD/YYYY | 10 | Employee plan participation date - Other plans  Required for all Buy Up / Supp LTD clients.  - if above is Y a date must be included | Leave blank |
| 65 | Hours Worked  scheduled hours worked per week | Passing if applicable otherwise blank | Character | 25 | **Hours worked -** **total # of hours worked in the past 12 months (preferred)** or alternatively regular scheduled work hours per week. Required for FMLA. This is a field on the intake labeled "Hours Worked Per Week". **For LOA eligibility there is no calculation performed on the data in this field. i.e. # of hours per week x 52** (This is a required field for all FMLA administered account)  - Required for all FMLA/Leave of absence clients,  - If employees in WI requires second "hours paid" field in  Add Data field below. | This field must send the Weekly Hours for the employee  **If employee PgrPayFrequency = Biweekly send** EecScheduledWorkHrs  **Divided by 2**  **If employee PgrPayFrequency = Semi Monthly send** EecScheduledWorkHrs  **Divided by 4 or 5 depending on weeks in the month** |
| 66 | At Worksite | Passing if applicable otherwise blank | Character | 50\* | Telecommuter Question - is employee working at a company worksite? Pass only if remote worker or telecommuter and flag as N. | Leave Blank |
| 67 | Domestic Partner  Indicator for Affidavits on-file | Passing if applicable otherwise blank | Character | 50 | Domestic Partner – Is there and Affidavits on file (Y/N) | Leave Blank |
| 68 | Spouse Working at the Same Company | Passing if applicable otherwise blank | Character | 50 | Spouse working at the same company (Spouse Last/First Name or Y/N) | Leave Blank |
| 69 | Key Employee Indicator | Passing if applicable otherwise blank | Character | 50 | Key employee rule - Required if administering key employee top 10% tier rule (Y/N) - Required if Key Employee Rule Applies | Leave Blank |
| 70 | Employees 50 in 75 Mile Indicator | Passing if applicable otherwise blank | Character | 50 | **Eligibility Notification** – Required if following 50 employees in a 75 mile radius (Y/N or define with a key) Required if 50 in 75 rule indicator applies. | Leave Blank |
| 71 | Add Data 01  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 72 | Add Data 02  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 73 | Add Data 03  (Update Label) | Passing if applicable otherwise blank  provide detail  blank | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 74 | Add Data 04  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 75 | Add Data 05  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 76 | Add Data 06  (If NY DBL/PFL client add indicator EE opt in of PFL = Y) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 77 | Add Data 07  (If NY DBL/PFL client add last 8 weeks of W2 earnings) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 78 | Add Data 08  (work state is WI - Paid Hours Worked Last 12 months) If WI EE passing paid hours, otherwise pass as blank | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 79 | Add Data 09  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |
| 80 | Add Data 10  (Update Label) | Passing if applicable otherwise blank  provide detail | Character | 50\* | Extra information /Additional information – Info that client would like Matrix to have regarding an employee | Leave Blank |

|  |  |
| --- | --- |
| **Contacts Provided** | **Available Functionality** |
| **No HR or Supervisor Contacts passed on HR Data File** | * **NOTIFICATIONS: Specified HR Users can receive HR Notification for ALL employees on leave** * **CALENDAR: Specified HR Users can have view ALL access for Absence Calendar** * **No notifications to supervisors** * **No calendar to supervisors** |
| **HR Email Alias passed on HR Data File** | * **NOTIFICATIONS: HR Notification for ALL employees (where alias is on the EE record in HR data) on leave distributed to alias** * **CALENDAR: Specified HR Members can have view ALL access for Absence Calendar- This must be configured by Matrix** |
| **HR Rep Email and or HR Manager Email Address passed on HR Data File** | * **NOTIFICATIONS: HR Notification for employees on EE record linked to HR contact are distributed to HR contact** * **CALENDAR: HR Contact receives Absence Calendar access for employees that are out that are linked to them** |
| **Manager Email Address** | * **NOTIFICATIONS: Supervisor Notification emails for employees on leave linked to Manager contact are distributed to Manager contact** * **CALENDAR: Manager receives Absence Calendar access for employees that are out that are linked to them** |
| **Supervisor Email Address (if supervisor work email is blank)** | * **NOTIFICATIONS: Supervisor Notification emails for employees on leave linked to Supervisor contact are distributed to Supervisor contact** * **CALENDAR: Supervisor receives Absence Calendar access for employees that are out that are linked to them – No My Hierarchy view** |
| **Supervisor Email Address (if supervisor work email is passed)** | * **NOTIFICATIONS: Supervisor Notification emails for employees on leave linked to Supervisor contact are distributed to Supervisor contact** * **CALENDAR: Supervisor in this scenario receives 2 Calendar Views:**  1. **Supervisor receives Absence Calendar access for employees that are out that are linked to them (MY DIRECT REPORTS)** 2. **Supervisor receives Absence Calendar access for any employees that are out that are linked to the Supervisors’ hierarchical chain (MY HIERARCHY)** |