Employee General Data with Benefits Administration Specification Sheet

General Information

- An asterisk (*) in the first position of any non-required field deletes the data in that field, unless otherwise noted.

- File must be uploaded in .csv format.

- To add more than one state or more than three locals to an employee, add additional rows. Each additional state must be on its own row. Up to three locals can be added per row.

  Note: These additional rows should not have any other non-state or non-local data. If there is any other non-state or non-local data it will be ignored. The non-state and non-local data must be in the employee's first row in the file.
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- When adding an employee without an employee number, all rows for a single employee must share the same value in the EE Sequence field.

- If the file contains multiple rows with multiple states and neither an Employee ID nor an EE Sequence value for those rows exist, the entire file will fail.

Field Name	Max Length	Field Format	Description
Company ID*	8	Alphanumeric	Paychex Client Number
Employee ID*	10	Alphanumeric	The value must be unique across all employees within a client. This value can't match the employee's SSN value. If the Employee ID is missing, the import process assumes the employee is being added and not updated.
Employee Type*	2	Values: EE, ICI, or ICC	EE = Employee ICI = Independent Contractor Individual ICC = Independent Contractor Company
First Name*[1,8]	30	Alphanumeric	
Middle Initial	1	Alphanumeric	

Last Name*	30	Alphanumeric	
Preferred Name	15	Alphanumeric	This field is optional.
IC Company Name*	80	Alphanumeric	
SSN*[8]	11	Format = XXX-XX-XXXX or XXXXXXXXX	The SSN field is used for the employee's Social Security Number. This field is optional.
Federal ID Number[3]	10	For company - XX-XXXXXXX	The Federal ID Number field is used for an independent contractor's Federal ID. This field is optional.
Birth Date*[8]	10	mm/dd/yyyy	Required when adding employees on Paychex HR Solutions (PHRS) or PEO clients Required when for adding employees who will be set up with a recurring GTL calculation on non-PHRS or PEO clients.
Clock ID	9		Employee's punch clock identifier. This value can't match the employee's SSN value.
Sex*[8]	1	Values: M or F	Required when adding employees with a State Unemployment state of CT, ME, NY, VT
Ethnic Origin	1	Values: 1, 2, 3, 4, 5, 6, or 7	1 = White (Not Hispanic or Latino) 2 = Black or African American (Not Hispanic or Latino) 3 = Hispanic or Latino 4 = Asian (Not Hispanic or Latino) 5 = American Indian or Alaskan Native (Not Hispanic or Latino) 6 = Native Hawaiian or other Pacific Islander (Not Hispanic or Latino) 7 = Two or More Races (Not Hispanic or Latino)
Address 1*[8] (Either the Address 1 field or the PO Box needs data)	30		Can be deleted with an asterisk (*) but a new value must be sent. Valid Values include Alphanumeric characters A-Z, a-z, 0-9, and symbols # and &.

			Address 1, City, State/Province, Zip/Postal Code, and Country must be populated the file when adding or updating an address.
Address 2	30		Optional Valid Values include Alphanumeric characters A-Z, a-z, 0-9, and symbols # and &.
PO Box Number*	10	Numeric	When the PO Box Number field is used, the Country field must = 'US'.
City*[8]	30		Address 1, City, State/Province, Zip/Postal Code, and Country must be populated the file when adding or updating an address.
State / Province*[8]	2	Alphanumeric	Valid 2 Digit Postal State / Province Code Address 1, City, State/Province, Zip/Postal Code, and Country must be populated the file when adding or updating an address.
Zip / Postal Code*[8]	10		5 or 9 = Zip Code 6 = Postal Code 10 = If Country does not equal 'CA' or 'US' Address 1, City, State/Province, Zip/Postal Code, and Country must be populated the file when adding or updating an address.
Country	2	Alphanumeric	Valid 2-digit abbreviated Country Code Address 1, City, State/Province, Zip/Postal Code, and Country must be populated the file when adding or updating an address.
Telephone	10	Numeric XXXXXXXXXX	The phone number must include area code and contain no punctuation.
Cell Phone	10	Numeric XXXXXXXXXX	The phone number must include area code and contain no punctuation. This field is optional.

Work Phone	10	Numeric XXXXXXXXXX	The phone number must include area code and contain no punctuation. This field is optional.
Work Phone Ext	7	Numeric XXXXXXX	This field is optional.
Full/Part Time*[8]	43	Values: FT, PT, or exact customized values	FT = Full Time PT = Part Time Customized values from CA For custom values, include FT or PT followed by the pipe character followed by the custom status. Example: If the custom value is 'Temporary' use FT|Temporary or PT|Temporary. This field is required when: • Adding any employee for Paychex HR Solutions (PHRS) clients • Adding employees assigned with a **State Unemployment** state of Indiana (IN) for non-PHRS clients This field can be left blank when adding employees assigned with a SUI state other than IN, on non-PHRS clients.
Eligible for Retirement Plan	1	Values: Y or N	
PEO Class Code	2		Field limited to the values set up on the client.
Organization Unit	69		Based on 10 level maximum Example: 246856|2543|26487|2485
Business Location Name	30		Location the employee is assigned to
Position	30		Current Job Title

EEO Job Category	3	Values: 1.1, 1.2, 2 ,3, 4, 5, 6, 7, 8 or 9	Valid values include: 1.1 = Executive/senior Level Officials and Managers 1.2 = First/Mid-level Officials and Managers 2 = Professionals 3 = Technicians 4 = Sales Employees 5 = Office and Clerical 6 = Craft Employees (Skilled) 7 = Operatives (semi-skilled) 8 = Laborers (unskilled) 9 = Service Employees
Work State	2	Alpha	This field represents the work state for employee's workers' compensation policy. Valid 2-digit State Abbreviation
Officer Type	1	Values: C, P, or S	Valid values include: Blank C = Corporate Officer P = Partner S = Sole Proprietor
Class Code	6	Alphanumeric	
Class Code Suffix	2		Needs a value if employee is covered by a Workers' Compensation Policy and does not have a waive code.
Waive Code	2	Values: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, or 13	Available Codes: 1 = Executive/corporate officer 2 = Sole proprietor 3 = Partner 4 = Farm employee 5 = Clergy 6 = Household employee 7 = Casual labor 8 = Real estate salesperson or independent contractor 9 = Educational employee 10 = Non-profit officer 11 = System generated 12 = Miscellaneous 13 = EE covered under other policy
Employee Status*	1	Values: A, T, L, or M	Employee Valid Values: A = Active T = Terminated L = On Leave (Inactive in CA reporting) M – Transferred (PBS only)

		Values: T, A, or L	Independent Contractor Valid Values: T = Terminated A = Active L = On Hold (Inactive in CA reporting) **Note:** Import is not able to terminate a supervisor until they have been removed from all employees. See *Supervisor field below*.
Reason (* if Employee Status is provided)	2	Values: 1, 2, 3, 4, 5, or 6	Active Status: 1 = Activate 2 = Hired 3 = Rehire 4 = Return from Leave 5 = Begin Contract (Ind Contractor) 6 = Resume Contract (Ind Contractor)
		Values: 1, 2, 3, 4, 5, 6, or 7	Terminated Status: 1 = Discharged 2 = Resigned 3 = Retired 4 = Deceased 5 = Terminate Contract (Ind Contractor) 6 = Termination 7 = PEO Services Cancelled (PBS Clients only) Or any valid custom termination reason that is already set up, which must match the custom reason (but is case sensitive) as displayed including a dash space, then the word "– voluntary" or "-involuntary". Ex. Leave - involuntary.
		Values: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, or 13	On Leave Status: 1 = Adoption Leave 2 = Disability 3 = Education Leave 4 = Family Leave 5 = Inactive 6 = Jury Duty 7 = Maternity Leave 8 = Medical Leave 9 = Military Leave 10 = Paternity Leave 11 = Seasonal Employee 12 = Student on Break 13 = Work is slow

		Value: 1	Transferred Status: 1 = Employee Transfer
		Value: 1	On Hold Status: 1 = Contract on Hold (Ind Contractor)
Benefits Termination Reason*9	2		Valid Values: VT = Voluntary Employment Termination DS = Divorce Separation EC = Employment Change NE = Ineligible IT = Involuntary Employment Termination LA = Leave of Absence RS = Resignation MC = Eligible for Medicare RH = Reduction in Hours DB = Disability DE = Deceased Employee EM = Entrance into Military Govt RT = Retirement GM = Gross Misconduct
Status Date	10	mm/dd/yyyy	This field can represent an Active, Termed, or On Leave date. Optional field when Employee Status of A (Active/Begin Contract) is provided. If this field is not populated and the Employee Status field is with A, the import will use the import run date for the Status date. Required field when the employee Status of L (On Leave) or T (Terminated) is provided.
Supervisor	10	Alphanumeric	This field is used to assign, update or remove a supervisor to an employee. The field is optional. This value must match the employee ID of the applicable supervisor. The supervisor can be unassigned by using an * in this field for the employee. **Note:** Import is not able to terminate a supervisor until they

			have been removed from all employees.
Pay Rate 1*8	2	Values: HR, PS, AS, DR, or PR	Valid Values: HR = Hourly Rate PS = Per Pay Period Salary AS = Annual Salary DR = Daily Rate PR = Piecework Rate
Pay Rate Amount 1*8	13	Numeric Rate format = XXXX.XXXX Salary format = XXXXXXXXX.XX	
Pay Rate 2	2	Values: HR, DR, or PR	Valid Values: HR = Hourly Rate DR = Daily Rate PR = Piecework Rate
Pay Rate Amount 2	9	Numeric	
Pay Rate 3	2	Values: HR, DR, or PR	Valid Values: HR = Hourly Rate DR = Daily Rate PR = Piecework Rate
Pay Rate Amount 3	9	Numeric XXXX.XX	Value for Rate is XXXX.XX
Pay Rate 4	2	Values: HR, DR, or PR	Valid Values: HR = Hourly Rate DR = Daily Rate PR = Piecework Rate
Pay Rate Amount 4	9	Numeric XXXX.XX	Value for Rate is XXXX.XX

Pay Rate 5	2	Values: HR, DR, or PR	Valid Values: HR = Hourly Rate DR = Daily Rate PR = Piecework Rate
Pay Rate Amount 5	9	Numeric from 0 to 9999.99	
Pay Frequency*[8]	2	Values: 52, 26, 24, 12, 4, 2 or 1	Amount of pay periods in a year 52 = Weekly 26 = Bi-weekly 24 = Semi-monthly 12 = Monthly 4 = Quarterly 2 = Semi-annually 1 = Annually
Benefits Pay Frequency*[8]	1-8		Valid Values: WKL = Weekly B-WKL = Bi-weekly SM-MNT = Semi-Monthly MNT = Monthly B-MNT = Bi-Monthly QRT = Quarterly ANN = Annually WKL-2 = Weekly2 B-WKL-2 = Bi-Weekly2 SM-MNT-2 = Semi-Monthly2 WKL-3 = Weekly3 B-WKL-3 = Bi-Weekly3 SM-MNT-3 = Semi-Monthly3 WKL-4 = Weekly4 B-MNT-4 = Bi-Monthly4 SM-MNT-4 = Semi-Monthly4 WKL-5 = Weekly5 B-WKL-5 = Bi-Weekly5 SM-MNT-5 = Semi-Monthly5
Standard Pay Hours*[8]	6	Numeric from 0 to 999.99 XXX.XX	Optional field - Use when the employee should be paid the same hours each pay period. Do not combine with Standard Hours 1-5 fields or Standard OT Hours 1-5 fields in the same file for an employee. It must be one or the other.
Standard OT Hours	6	Numeric from 0 to 999.99 XXX.XX	Optional field - Use when the employee should be paid the same OT Hours each pay period. Do not combine with Standard Hours 1-5 fields or Standard OT Hours 1-5

			fields in the same file. It must be one or the other.
Standard Hours 1	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same hours for Rate 1 each pay period. If this field is populated, then the Pay Rate 1 and the Pay Rate Amount 1 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard Hours 2	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same hours for Rate 2 each pay period. If this field is populated, then the Pay Rate 2 and the Pay Rate Amount 2 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard Hours 3	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same hours for Rate 3 each pay period. If this field is populated, then the Pay Rate 3 and the Pay Rate Amount 3 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard Hours 4	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same hours for Rate 4 each pay period. If this field is populated, then the Pay Rate 4 and the Pay Rate Amount 4 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.

Standard Hours 5	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same hours for Rate 5 each pay period. If this field is populated, then the Pay Rate 5 and the Pay Rate Amount 5 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard OT Hours 1	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same over time hours for Rate 1 each pay period. If this field is populated, then the Pay Rate 1 and the Pay Rate Amount 1 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard OT Hours 2	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same over time hours for Rate 2 each pay period. If this field is populated, then the Pay Rate 2 and the Pay Rate Amount 2 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard OT Hours 3	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same over time hours for Rate 3 each pay period. If this field is populated, then the Pay Rate 3 and the Pay Rate Amount 3 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the

			same file. It must be one or the other.
Standard OT Hours 4	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same over time hours for Rate 4 each pay period. If this field is populated, then the Pay Rate 4 and the Pay Rate Amount 4 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Standard OT Hours 5	6	Numeric from 0 to 999.99 XXX.XX	Optional field – Use when the employee should be paid the same over time hours for Rate 5 each pay period. If this field is populated, then the Pay Rate 5 and the Pay Rate Amount 5 fields are required. Do not combine with Standard Hours or Standard OT Hours fields in the same file. It must be one or the other.
Overtime Exempt	1	Values: Y, N, or leave Blank	Y = Withhold N = Taxable Blank = I.C.s and Fed-exempt Employees
Federal Tax Residency	2	Values: R or N	R = Resident N = Non-Resident
Federal Taxability Status	1	Values: Y or N	Value = Y or N Y is not valid for Independent Contractors Employees cannot be loaded with a Federal status of Exempt. It must be either Y or N, then changed in the system, if necessary.
Federal Filing Status	3	Values: S, M, or MWS	S = Single M = Married MWS = Married but withhold at a single rate

Field	Length	Format	Description
Federal Allowances	2	Numeric from 0 to 99	0 - 99
Federal Additional Tax Amount	12	Numeric from .01 to 999999999.99	
Federal Additional Tax Percentage	8	Numeric from .0001 to 999.9999	
Federal Override Tax Amount	12	Numeric from .01 to 999999999.99	
Federal Override Tax Percentage	8	Numeric from 0 to 999.9999	
EE Sequence	10	Alphanumeric	This field is required when adding an employee, without an employee number in the file, that has multiple states and or locals. It is used to group the states and locals to that employee. The sequence number must be the same for all rows that relate to an employee. For example: Janet has 3 states. 	EE Sequence	State Income Tax	 	3EF	NY	 	3EF	OH	 	3EF	NJ	 This is not required or needed for updating employee information even if they have multiple states and locals. Optional
State Income Tax	2	Alphanumeric	Valid 2-digit State Abbreviation Required for employees in states that have state withholding.

			This is also needed for ICs, but only triggers withholding if state code is **PA.**
State Tax Residency	1	Values: Y, N or Blank	Required when adding an employee that has multiple states. An employee can only have one resident state.
State Percent Worked	3	Numeric Values: 0-100 whole numbers only	Required when adding an employee that has multiple states: • The state percent must equal 100% across all states for that employee in the file. Updating an employee: • Optional when updating an employee to add a state with 0 percent. • Required when updating an employee and changing the percentage worked for any state. The rows must equal 100% in the file for that employee.
State Taxability Status[1]	1	Values: Y, N, or Blank	Y = Wages are taxable and withhold taxes N = Wages are taxable, but do not withhold taxes Employees cannot be loaded with a state taxability status of Exempt (wages not taxable). It must be either Y or N, then changed in the system. Leave blank for: • Employees who are assigned a state that does not have state tax withholding • Independent Contractors assigned to any state except Pennsylvania (Y or N is required for PA ICs)
State Unemployment (* if State Taxability Status provided)	2	Alphanumeric	Valid 2 digit State Abbreviation

			If NY, Paid Family Leave tax may automatically be applied to new employees per client setup If WA, Paid Family Leave and Paid Medical Leave taxes may automatically be applied to new employees per client setup. Leave blank for Independent Contractors

Worksite Code	21	Alphanumeric and
		
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			Optional field
			
			When adding an employee,
			
			    If the assigned Business Location has a new employee Worksite default, and this field is not populated, the default will be used.
			
			    If the field is populated, it will override the new employee default.
			
			    If there's no Business Location default, a Worksite Code will not be assigned unless a value is populated.
			
			To update an employee, a value should be populated (the Business Location default cannot be applied)

State Disability (* if State Taxability Status provided)	1	Values: Y, N, or Blank	Valid values for the State Disability field when the SUI state has Disability Y = Wages are taxable and withhold taxes. N = Wages are taxable but do not withhold taxes. Leave Blank for: • Employees whose SUI state does not have Disability • Employees whose wages are not taxable for Disability • Independent Contractors

State Filing Status ([1] Only when state has a filing status)	4		Based on State Regulation Table Leave Blank if State Taxability is N or blank
State Allowance Name 1	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by State	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance Leave blank for AZ, MS, PA (these states have unique withholding setups), and any states that do not have state withholding.
State Allowance Number 1	2	Numeric from 0 to 99	Leave blank if State Allowance Name 1 is blank
State Allowance Amount 1	9	Numeric from 0 to 999999999	Leave blank if State Allowance Name 1 is blank
State Allowance Name 2	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by State	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance Leave blank for: • AZ, MS, PA • if the assigned state only has one type of exemption, or • any states that do not have state withholding.
State Allowance Number 2	2	Numeric from 0 to 99	Leave blank if State Allowance Name 2 is blank
State Allowance Amount 2	9	Numeric from 0 to 999999999	Leave blank if State Allowance Name 2 is blank

State Allowance Name 3	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by State	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance Leave blank for: • AZ, MS, PA • if the assigned state only has one type of exemption, or • any states that do not have state withholding.
State Allowance Number 3	2	Numeric from 0 to 99	Leave blank if State Allowance Name 3 is blank
State Allowance Amount 3	9	Numeric from 0 to 999999999	Leave blank if State Allowance Name 3 is blank
State Additional Tax Amount	12	Numeric from .01 to 999999999.99	Valid for EEs and PA ICs Only one of the following can be populated: • State Additional Tax Amount • State Additional Tax Percentage • State Override Tax Amount • State Override Tax Percentage Can be deleted with an asterisk (*). This reinstates withholding at the system rate.
State Additional Tax Percentage	8	Numeric from .01 to 999.9999	Valid for EEs and PA ICs Only one of the following can be populated: • State Additional Tax Amount • State Additional Tax Percentage • State Override Tax Amount

			• State Override Tax Percentage Can be deleted with an asterisk (*). This reinstates withholding at the system rate.
State Override Tax Amount	12	Numeric from .01 to 999999999.99	Valid for EEs and PA ICs Only one of the following can be populated: • State Additional Tax Amount • State Additional Tax Percentage • State Override Tax Amount • State Override Tax Percentage Can be deleted with an asterisk (*). This reinstates withholding at the system rate.
State Override Tax Percentage	8	Numeric from .0001 to 999.9999	Valid for EEs and PA ICs Only one of the following can be populated: • State Additional Tax Amount • State Additional Tax Percentage • State Override Tax Amount • State Override Tax Percentage Can be deleted with an asterisk (*). This reinstates withholding at the system rate.
Reduced Withholding Amount	10	Numeric from .01 to 999999999.99	Optional for CT & VA State income tax only, otherwise leave blank.
State Withholding %	8	Numeric from .0001 to 999.9999	Populate for AZ state income tax only, otherwise leave blank.

Dependent Health Insurance Benefits Indicator	1	Values: Y, N, or Blank	Leave blank for independent contractors. Populate only if SUI = NY, otherwise leave blank.
Date Dependent Health Ins Benefits are Available	10	mm/dd/yyyy	Leave blank for independent contractors. Populate only if SUI = NY, otherwise leave blank.
Employee Health Insurance Benefits Indicator	1	Values: Y, N or Blank	Leave blank for independent contractors Populate only if SUI = GA, IA, MD, MS, ND or PR, otherwise leave blank
Date Employee Health Ins Benefits are Available	10	mm/dd/yyyy	Leave blank for independent contractors Populate only if SUI = IA, otherwise leave blank
County	30	Alphnumeric	Required for MD residents only, otherwise leave blank.
Family Owned Business Owner Indicator	1	Values: Y, N, or Blank	Populate only if SUI = Michigan, otherwise leave blank.
Seasonal Indicator	1	Values: Y, N, or Blank	Leave blank for independent contractors Populate only if SUI = ME or CO, otherwise leave blank
State Jurisdiction 1	2	Alphanumeric	Valid 2 digit State Abbreviation
Local Regulation Name 1	8	Alphanumeric	Value = Local Short Name Required for adding or updating for this tax Do not include Employer tax locals, i.e. NY MCTMT

Local Tax Residency 1	1	Values: R, N, E, B, or Blank	MI & NY: R = Resident N = Non-Resident OH: E = Employment R = Residence B = Employment/Residence Leave blank for NYC local
PA Live/Work Status 1	1	Values: 1, 2, 3, 4, or 5	Valid Values: 1 = Lives here/works in a different PA Local 2 = Lives here/works out of the state 3 = Works and lives in this local 4 = Works here/lives in a different PA local 5 = Works here/lives out of state
Local Taxability Status 1	1	Values: Y or N	Y not valid for Independent Contractors
Local Filing Status 1	4		Based on Filing Status Table
Local Allowance Name 1	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by Local	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance
Local Allowance Number 1	2	Numeric from 0 to 99	
% of Earnings Taxed 1	5	Numeric from 0 to 100	
Ohio Local Residence Tax Rate 1	8	Numeric from .0001 to 999.9999	
Local Additional Tax Amount 1	12	Numeric from .01 to 999999999.99	
Local Additional Tax Percent 1	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Local Override Tax Amount 1	12	Numeric from .01 to 999999999.99	Use for locals in NY, PA, DE, and IN.

Local Override Tax Percent 1	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Employee Waiver Indicator 1	1	Values: Y, N or Blank	Use for AL, CO, and PA Occupational Privilege Tax (OPT).
State Jurisdiction 2	2	Alphanumeric	Valid 2 digit State Abbreviation
Local Regulation Name 2	8	Alphanumeric	Value = Local Short Name Required for adding or updating for this tax Do not include Employer tax locals, i.e. NY MCTMT
Local Tax Residency 2	1	Values: R, N, E, B, or Blank	MI & NY: R = Resident N = Non-Resident OH: E = Employment R = Residence B = Employment/Residence Leave blank for NYC local
PA Live/Work Status 2	1	Values: 1, 2, 3, 4, or 5	Valid Values: 1 = Lives here/works in a different PA Local 2 = Lives here/works out of the state 3 = Works and lives in this local 4 = Works here/lives in a different PA local 5 = Works here/lives out of state
Local Taxability Status 2	1	Values: Y, N, or Blank	Y not valid for Independent Contractors
Local Filing Status 2	4		Based on Filing Status Table
Local Allowance Name 2	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by Local	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance
Local Allowance Number 2	2	Numeric from 0 to 99	

% of Earnings Taxed 2	5	Numeric from 0 to 100	
Ohio Local Residence Tax Rate 2	8	Numeric from .0001 to 999.9999	
Local Additional Tax Amount 2	12	Numeric from .01 to 999999999.99	
Local Additional Tax Percent 2	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Local Override Tax Amount 2	12	Numeric from .01 to 999999999.99	Use for locals in NY, PA, DE, and IN.
Local Override Tax Percent 2	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Employee Waiver Indicator 2	1	Values: Y, N, or Blank	Use for AL, CO, and PA Occupational Privilege Tax (OPT).
State Jurisdiction 3	2	Alphanumeric	Valid 2 digit State Abbreviation
Local Regulation Name 3	8	Alphanumeric	Value = Local Short Name Required for adding or updating for this tax Do not include Employer tax locals, i.e. NY MCTMT
Local Tax Residency 3	1	Values: R, N, E, B, or Blank	MI & NY: R = Resident N = Non-Resident OH: E = Employment R = Residence B = Employment/Residence Leave blank for NYC local
PA Live/Work Status 3	1	Values: 1, 2, 3, 4, or 5	Valid Values: 1 = Lives here/works in a different PA Local 2 = Lives here/works out of the state 3 = Works and lives in this local 4 = Works here/lives in a different

			PA local 5 = Works here/lives out of state
Local Taxability Status 3	1	Values: Y, N, or Blank	Not valid for Independent Contractors.
Local Filing Status 3	4		Based on Filing Status Table
Local Allowance Name 3	5	Values: ADDL, EXEM, OTHER, PERS, SPEC, or WA Varies by Local	ADDL = Additional withholding Allowance EXEM = Exemption Allowance OTHER = Other Deduction PERS = Personal Allowance SPEC = Special Allowance WA = Withholding Allowance
Local Allowance Number 3	2	Numeric from 0 to 99	
% of Earnings Taxed 3	5	Numeric from 0 to 100	
Ohio Local Residence Tax Rate 3	8	Numeric from .0001 to 999.9999	
Local Additional Tax Amount 3	12	Numeric from .01 to 999999999.99	
Local Additional Tax Percent 3	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Local Override Tax Amount 3	12	Numeric from .01 to 999999999.99	Use for locals in NY, PA, DE, and IN.
Local Override Tax Percent 3	8	Numeric from .0001 to 999.9999	Use for locals in NY, PA, DE, and IN.
Employee Waiver Indicator 3	1	Values: Y, N, or Blank	Use for AL, CO, and PA Occupational Privilege Tax (OPT).
Job Number	25	Alphanumeric and special characters	Optional field

Labor Assignment	25	Alphanumeric	Active Labor assignments set up on client
Home Email	250	Alphanumeric	Can be used to add a Home email address. Use standard email format. Ex: XXXX@imperial.com. Can be deleted with an asterisk (*).
Work Email	250	Alphanumeric	Can be used to add a Work email address. Use standard email format. Ex: XXXX@imperial.com. Can be deleted with an asterisk (*).
Hired Date	10	mm/dd/yyyy	Can be used to set the Hired Date when an employee or independent contractor is being added with a status and reason other than Active/Hired or Active/Begin Contract, or when an existing Hired Date is being updated. Cannot be deleted with an asterisk (*).
Benefits Eligibility Indicator*[7]	1		Y or N
Benefits Override Date	10		mm/dd/yyyy
Benefits Custom Field Name 1*[8]	30		Based on Custom Field label 1
Benefits Custom Field Value 1*[8]	35		Based on Custom Field Value 1 drop-down values
Benefits Custom Field Name 2*[8]	30		Based on Custom Field label 2
Benefits Custom Field Value 2*[8]	35		Based on Custom Field Value 2 drop-down values
Benefits Custom Field Name 3*[8]	30		Based on Custom Field label 3
Benefits Custom Field Value 3*[8]	35		Based on Custom Field Value 3 drop-down values

Benefits Custom Field Name 4*[8]	30		Based on Custom Field label 4
Benefits Custom Field Value 4*[8]	35		Based on Custom Field Value 4 drop-down values
Benefits Custom Field Name 5*[8]	30		Based on Custom Field label 5
Benefits Custom Field Value 5*[8]	35		Based on Custom Field Value 5 drop-down values
Benefits Custom Field Name 6*[8]	30		Based on Custom Field label 6
Benefits Custom Field Value 6*[8]	35		Based on Custom Field Value 6 drop-down values
Benefits Custom Field Name 7*[8]	30		Based on Custom Field label 7
Benefits Custom Field Value 7*[8]	35		Based on Custom Field Value 7 drop-down values
Insurance Standard Hours Same as Standard Hours	1		Y or N
Insurance Standard Hours*[8]	3		XXX.XX - Numbers between 0 and 999.99
Insurance Annual Salary Override	1		Y or N
Insurance Annual Salary	13		Required if Insurance Annual Salary Override is set to Y Value for Salary is XXXXXXXXX.XX

* Required field.

[1] Required field when adding an employee.

[2] Updating of this field is not allowed.

[3] Value masked within the message.

[4] 7 digits = "Blank" Area Code; parenthesis and dashes can be included (will be stripped during import).

[5] Subscript removed

[6] Subscript removed

[7] Required if adding an employee or updating an existing employee for whom the Benefits Eligible value has not been set.

8 Required if adding an employee who is benefits eligible or updating an existing employee who has not yet been set up as benefits eligible.

9 Required if updating an existing employee's status to T (Terminated) and employee is benefits eligible.