

## Fields Transferred Ascentis HR to Sage Pro ERP

The following tables show how fields are transferred from Ascentis HR to Sage Pro ERP:

From Ascentis HR	To Sage Pro ERP
Birth Date	Birth Date
Citizen	Citizen
City	City
Department	Department (as mapped in Payroll Setup Wizard)
Employee Status	Status
First Name	Employee First Name
Group - Term Life Insurance	Group - Term Life Insurance
Home/Work Phone	Phone
Hours per Week	Regular Hours
Job Title	Job (as mapped in Payroll Setup Wizard)
Last Name	Last Name
Last Pay Date	Last Pay Date
Last Raise Date	Last Raise Date
Last Review Date	Last Review Date
Location	Mapping depends on how the field is set up in Payroll Setup Wizard
Middle Name	Will be shown in Employee First Name
Next Review Date	Next Review Date
Pay Period	Pay Cycle
Sex	Gender (Male or Female)
SSN/SIN	SSN/SIN
Start Date for current salary	Effective Date
State	State
Street 1	Address Line 1
Street 2	Address Line 2
Termination Date	Termination Date
Zip or Postal Code	Zip or Postal Code

**Accrual/Leave Fields to be Transferred:**

PR Name	PR Constraints	Comments
Active	On or Off	Turn off when a leave type accrues zero, has no adjustment, no leave is taken, and available hours are zero.
Use Regular Pay Rate	On or Off	Always turn on.
Standard Posting Entry	On or Off	Must be on; otherwise, it will not be included in posting.
Regular Hours	Cannot be negative	Any leave taken during the payroll period goes here.
Begin Accrual		Start date of leave type or start of calendar year, whichever is later.
Accrual Rate Period (not named – follows Accrual Rate Field)		Any leave accrued goes here.
Accrual Limit	On or Off	Set to 9999; the limit will be traced in Ascentis HR, not in Payroll.
Carryover %		Set to zero (0); carryover will be calculated in Ascentis HR.
Balance Forward		<p>Plug in whatever value would make this formula balance:            Balance Forward + YTD Amount Accrued – YTD Amount Taken = Amount Available.</p> <p>The Balance Forward Field will be affected by carry over amounts and adjustments.</p>
YTD Amount Accrued		<p><b>Note:</b> YTD is always based on the calendar year. Use calculated value of YTD accrued leave from Ascentis HR.</p> <p><b>Note:</b> Figure out if YTD always means the calendar year.</p>
YTD Amount Taken		<p>Use calculated value of YTD accrued leave taken from Ascentis HR.</p> <p><b>Note:</b> Figure out if YTD always means the calendar year.</p>
Amount Available		Use calculated value from Ascentis HR of leave available at the end of the payroll period.

**Health, Life, Disability, and Other Deduction Fields to be Transferred:**

PR Name	PR Constraints	Comments
Active	On or Off	On if the amount is non-zero.
Standard Posted Entry	On or Off	Must be on; otherwise it will not be included in posting.
Deduction Amount		Employee contribution.
Yearly Max		Not applicable. Can be zero? Or else something very large?
Goal		Not applicable. Can be zero? Or else something very large?
Employer Match Amount		Employer contribution.
Effective Date		Enrollment effective date.
Active	On or Off	Turn off if both contributions are zero.

**Retirement Deduction Fields to be Transferred for Rate Based Deductions:**

PR Name	PR Constraints	Comments
Active	On or Off	On if the amount is non-zero.
Standard Posted Entry	On or Off	Must be on; otherwise it will not be included in posting.
Deduction Rate		If the Ascentis HR deduction is expressed as an amount and the Payroll deduction is defined as using a rate, then give a warning and do not transfer the amount.
Yearly Max		Get the employee yearly contribution from Ascentis HR.
Goal		Not applicable. Can be zero? Or else something very large?
Employer Match Amount		Do not change – use defaults.
Maximum Match		Do not change – use defaults.

**Retirement Deduction Fields to be Transferred for Amount (Flat) based Deductions:**

PR Name	PR Constraints	Comments
Active	On or Off	On if the amount is non – zero.
Standard Posted Entry	On or Off	Must be on; otherwise it will not be included in posting.
Deduction Amount		If the Ascentis HR deduction is expressed as a percent and the Payroll deduction is defined as a flat amount, then give a warning and do not transfer the percent.
Yearly Max		Get the employee yearly contribution from Ascentis HR.
Goal		Not applicable. Can be zero? Or else something very large?
Employer Match Amount		Employer contribution from Ascentis HR.

**Note:** Section 125 Dependent and Medical Care Spending Accounts work the same way, except there should be no employer match

**Bonus Fields to be Transferred:**

PR Name	PR Constraints	Comments
Active	On or Off	On if there is a bonus amount during this payroll period.  Off if there is no bonus.
Standard Posted Entry	On or Off	Must be on; otherwise it will not be included in posting.
Pay Rate		The total of all linked bonuses paid during that period.

**Group Term Life Fields to be Transferred for the Calculation of Tax on Life Imputed Income:**

PR Name	PR Constraints	Comments
Active	On or Off	On if the amount of life + Supplemental life coverage exceeds \$50,000.
Standard Posted Entry	On or Off	Must be on; otherwise it will not be included in posting.
Pay Rate		Put the employer's cost for the whole year of linked life and supplemental life plans. \$50,000 of coverage is exempt from the tax, so prorate the cost according to the excess amount of coverage over \$50,000 versus the base \$50,000.

