



# **Management Planning Guide**

**Version 4.4**

The information contained in this guide is subject to change without notice. Bond International Software, Inc., (Bond) shall not be liable for technical or editorial errors or omissions contained herein; nor for incidental or consequential damages resulting from the furnishing, performance, or use of this material.

This manual contains information protected by copyright. No part of this guide may be photocopied or reproduced in any form without prior written consent from Bond. The software described in this manual is furnished under a license agreement or nondisclosure agreement. This software may be used or copied only in accordance with terms of the agreement.

© 2018, Bond International Software, Inc. All rights reserved.

Printed in the U.S.A.

# Table of Contents

|                                             |           |
|---------------------------------------------|-----------|
| <b>Section 1: The MPL Session .....</b>     | <b>1</b>  |
| Creating Your Adapt Team .....              | 2         |
| Customer Roles and Responsibilities.....    | 2         |
| Recruit Roles and Responsibilities .....    | 3         |
| Preparing for your Management Planning..... | 5         |
| <b>Section 2: Manage Lists .....</b>        | <b>7</b>  |
| Introduction .....                          | 8         |
| List Concepts .....                         | 9         |
| System and User-Defined Lists.....          | 9         |
| Standard Codes .....                        | 9         |
| Manage Lists.....                           | 10        |
| Selecting a List.....                       | 10        |
| Adding a Parent Code to a List .....        | 11        |
| Adding a Child Code to a List .....         | 11        |
| Editing an Existing Code on a List .....    | 12        |
| Deleting an Existing Code on a List .....   | 12        |
| <b>Section 3: Lists .....</b>               | <b>13</b> |
| List Customization.....                     | 14        |
| Arrival Call Result .....                   | 16        |
| Attire .....                                | 17        |
| Bill Group (Back Office Only) .....         | 18        |
| Candidate Availability Notice.....          | 19        |
| Candidate Job Preference.....               | 20        |
| Candidate Log a Call Outcome.....           | 21        |
| Candidate Ranking.....                      | 23        |
| Certification .....                         | 24        |
| Check Handling.....                         | 26        |
| Client Evaluation Result .....              | 27        |
| Client Evaluation Status.....               | 28        |
| Company Service Level.....                  | 29        |
| Contact Job Role .....                      | 30        |
| Contact Level .....                         | 33        |
| Contact Log a Call Outcome.....             | 34        |
| Contact Type .....                          | 36        |
| Degrees.....                                | 38        |
| Division.....                               | 39        |
| GL Account Type.....                        | 40        |
| Healthcare Cancellation Reason .....        | 41        |

|                                             |     |
|---------------------------------------------|-----|
| Healthcare Decline Reason .....             | 42  |
| Healthcare No Offer Reason .....            | 43  |
| Healthcare Offer of Coverage .....          | 44  |
| Healthcare Plans.....                       | 45  |
| Incident Type .....                         | 46  |
| Industry Sector .....                       | 47  |
| Invoice Handling US (Back Office Only)..... | 52  |
| Invoice Template (Back Office Only).....    | 53  |
| Invoice Terms.....                          | 54  |
| Job Category.....                           | 55  |
| Job Priority .....                          | 71  |
| Languages .....                             | 72  |
| Metropolitan Areas.....                     | 74  |
| Occupational Code (Back Office Only).....   | 94  |
| Onboarding Group .....                      | 95  |
| Probationary Code (Back Office Only).....   | 96  |
| Project Contract Type .....                 | 97  |
| Project Type .....                          | 98  |
| Reason Assignment/Placement Ended .....     | 99  |
| Reason for Leaving Previous Employment..... | 100 |
| Reference Relationship .....                | 101 |
| Rehire Reason .....                         | 102 |
| Salutation Title .....                      | 103 |
| Security Clearance Agency .....             | 104 |
| Security Clearance Level .....              | 105 |
| Separation Reason.....                      | 106 |
| Shifts .....                                | 107 |
| Skill .....                                 | 108 |
| Skill Proficiency.....                      | 117 |
| Source.....                                 | 118 |
| Supplier Discipline.....                    | 120 |
| Test Level.....                             | 121 |
| Test Names.....                             | 122 |
| Topics for Companies .....                  | 123 |
| Topics for People .....                     | 125 |
| UDF Candidate Code x .....                  | 126 |
| UDF Candidate Multi Code x .....            | 127 |
| UDF Client Code x.....                      | 128 |
| UDF Client Multi Code x.....                | 129 |
| UDF Job Order Code x .....                  | 130 |
| UDF Job Order Multi Code x.....             | 131 |
| Visa Type .....                             | 132 |
| VMS Req Reactivate Reason.....              | 133 |

|                                                                           |            |
|---------------------------------------------------------------------------|------------|
| VMS Req Reject Reason.....                                                | 134        |
| WC Claim Status.....                                                      | 135        |
| WC Duty Status .....                                                      | 136        |
| WC Claim Category.....                                                    | 137        |
| WC Topic.....                                                             | 138        |
| WC Outcome.....                                                           | 139        |
| UE Claim Status.....                                                      | 140        |
| UE Determination .....                                                    | 141        |
| UE Topic.....                                                             | 142        |
| UE Outcome.....                                                           | 143        |
| <b>Section 4: Security Profiles.....</b>                                  | <b>145</b> |
| Permissions.....                                                          | 146        |
| Permissions Grid.....                                                     | 153        |
| <b>Section 5: User Profiles.....</b>                                      | <b>159</b> |
| <b>Section 6: Notifications .....</b>                                     | <b>163</b> |
| Merge Fields.....                                                         | 164        |
| 1st Report of Injury (Internal).....                                      | 171        |
| Auto Create Potential Duplicate Candidate from Broadbean (Internal).....  | 173        |
| Candidate Completed Onboarding Item on Portal (Internal).....             | 175        |
| Candidate Declined to eSign Onboarding Item on Portal (Internal).....     | 177        |
| Candidate Document Uploaded From Web (Internal).....                      | 179        |
| Candidate Merged (Internal).....                                          | 181        |
| Candidate Unemployment Flag Updated (Internal).....                       | 183        |
| Change Contract Assignment Rates (Internal).....                          | 185        |
| Change Contract Job Rates (Internal) .....                                | 187        |
| Close Job Order (Internal).....                                           | 189        |
| Compass Candidate Applied (Internal).....                                 | 191        |
| Employee Direct Deposit Created, Updated or Deleted (Internal) .....      | 193        |
| End Contract Assignment (Internal) .....                                  | 195        |
| I9 Form - Section One of the I9 Form Complete (Internal).....             | 197        |
| LinkedIn CSA (Cross System Awareness) Bulk Linking Error (Internal) ..... | 199        |
| LinkedIn Limited Listing Job Posting Failure (Internal).....              | 201        |
| LinkedIn Seat Holder Retrieval Failure (Internal).....                    | 203        |
| New Assignment Incident (Internal).....                                   | 205        |
| New Contract Assignment (Internal) .....                                  | 207        |
| New Contract Job from Web (Internal) .....                                | 209        |
| New Contract Job Order (Internal) .....                                   | 211        |
| New Direct Job from Web (Internal) .....                                  | 213        |
| New Direct Job Order (Internal) .....                                     | 215        |
| New Direct Placement (Internal) .....                                     | 217        |
| New Web Portal Candidate (Internal).....                                  | 219        |
| Payroll Tax Record Added or Updated (Internal).....                       | 221        |

|                                                             |            |
|-------------------------------------------------------------|------------|
| Potential Duplicate from Broadbean Search (Internal) .....  | 223        |
| Reassign Candidate (Internal) .....                         | 225        |
| TempBuddy Failure Notification (Internal) .....             | 227        |
| Unemployment Claim Status Updated (Internal) .....          | 229        |
| VMS: Automated Update to Converted VMS Req (Internal) ..... | 231        |
| VMS: New Requisition (Internal) .....                       | 233        |
| VMS Req Converted to Job Opportunity (Internal) .....       | 235        |
| VMS Req Converted to Job Order (Internal) .....             | 237        |
| VMS Req Failed (Internal) .....                             | 239        |
| VMS Requisition Updated (Internal) .....                    | 241        |
| Web Portal Candidate My Profile Updated (Internal) .....    | 243        |
| WC Claim Status or Modified Duty Updated (Internal) .....   | 245        |
| WOTC Questionnaire Completed by Candidate (Internal) .....  | 247        |
| Candidate Assigned (External) .....                         | 249        |
| Candidate Password Reset (External) .....                   | 251        |
| Candidate Submitted - Contract (External) .....             | 253        |
| Compass Candidate Applied (External) .....                  | 255        |
| Document eSigned (External) .....                           | 257        |
| New Candidate From Portal (External) .....                  | 259        |
| OB Item Assigned (External) .....                           | 261        |
| OB Item Completed (External) .....                          | 263        |
| <b>Section 7: Onboarding .....</b>                          | <b>267</b> |
| Onboarding Relationship .....                               | 268        |
| Classic Onboarding Policies .....                           | 269        |
| Classic Onboarding Policies .....                           | 270        |
| Classic Onboarding Policies .....                           | 271        |
| Classic Onboarding Policies .....                           | 272        |
| Classic Onboarding Policies .....                           | 273        |
| Classic Onboarding Policies .....                           | 274        |
| Classic Onboarding Policies .....                           | 275        |
| Classic Onboarding Policies .....                           | 276        |
| Classic Onboarding Policies .....                           | 277        |
| Classic Onboarding Policies .....                           | 278        |
| Compass Onboarding Policies .....                           | 279        |
| Compass Onboarding Policies .....                           | 280        |
| Compass Onboarding Policies .....                           | 281        |
| Compass Onboarding Policies .....                           | 282        |
| Compass Onboarding Policies .....                           | 283        |
| Compass Onboarding Policies .....                           | 284        |
| Compass Onboarding Policies .....                           | 285        |
| Compass Onboarding Policies .....                           | 286        |
| Compass Onboarding Policies .....                           | 287        |
| Compass Onboarding Policies .....                           | 288        |



# The MPL Session

**Congratulations** on your purchase of Adapt, Erecruit's world-class staffing and recruiting software. We know you are eager and excited to start using it. The best way to ensure success with the software is to have a thoroughly planned and carefully executed implementation.

The first milestone of your implementation is the Management Planning (MPL) session. This is the time for your team and the Adapt implementation team to join together to plan out the implementation and setup of your new Adapt system.

This workbook is designed to aid you in preparing for the Management Planning session and to guide you through that process.

# Creating Your Adapt Team

The overall goal of your implementation is to improve operating efficiency while simultaneously improving customer service and employee morale. The key to successfully completing this goal is a simultaneous roll-out of application, process and culture with continuous change management. As you move your new software into production, your employees need to have the confidence and ability to perform their daily tasks without an adverse impact on your customers or company.

To successfully implement both a new application and change management requires team collaboration. This team will consist of members from both Erecruit and your company. If your organization is relatively small or simply structured, you may find that some roles can be successfully performed by the same person and that your team may be limited to as few as 2 people. If you have a larger or more complex organization, you may find that more people are needed and some roles split across multiple employees.

---

## Customer Roles and Responsibilities

---

Here is a list of the responsibilities that will be required of your team and suggested related roles. A list of responsibilities and roles of the Erecruit implementation team are included for reference as well.

### **Executive Sponsor**

- ✓ Sets overall project visions
- ✓ Drives organization adoption
- ✓ Acts as final point of escalation

### **Project Manager**

- ✓ Drives project/deliverables
- ✓ Delivers the vision of the Executive Sponsor
- ✓ Communicates project status
- ✓ Defines and designs business workflows and requirements
- ✓ Engages in change management process
- ✓ Ensures all job functions within the company have provided input and validated requirements
- ✓ Identifies and enlists appropriate team members when required
- ✓ Organizes the testing of migrated data, application or custom built solutions
- ✓ Develops the roll-out plan for training and development

**IT Specialist**

- ✓ Ensures hardware, software and network requirements are met and optimally laid into the existing infrastructure to ensure successful operation of the product by all users and administrators
- ✓ Provides assistance to Erecruit installers for installation of software
- ✓ Tests and maintains systems

**Trainers**

- ✓ Trains the company on the new application
- ✓ Assists in the development of custom training documents (if required)

**Change Management**

- ✓ Identifies and shares management objectives throughout the organization
- ✓ Prepares employees for transition and sets expectations as to the impact of change
- ✓ Increases speed, breadth and depth of user adoption

---

## **Erecruit Roles and Responsibilities**

---

**Implementation Consultant**

- ✓ Manages project from start to end
- ✓ Identifies project scope
- ✓ Creates project plan
- ✓ Assists in identification of customer's unique business workflows
- ✓ Identifies and enlists appropriate team members when required
- ✓ Tests migrated data, application or custom built solutions
- ✓ Provides application training
- ✓ Develops customized training plans

**Data Migrations Engineer**

- ✓ Performs analysis of legacy data
- ✓ Creates data migration timeline for inclusion in master project plan
- ✓ Creates data maps
- ✓ Creates translation tables
- ✓ Provides data samples for validation
- ✓ Performs any corrections and/or changes to sample migrated data
- ✓ Coordinates data pull for actual go live migration
- ✓ Conducts final go live migration run

**System Engineer**

- ✓ Installs Erecruit related software
- ✓ Creates appropriate environments (PROD, DEMO, etc.)
- ✓ Installs all patches, upgrades, service packs, etc., prior to go live
- ✓ Assists the Data Migration Engineer in loading final go live data

# Preparing for your Management Planning

The Management Planning session is designed for you to determine how Adapt will function in your organization. The discussions will include topics that are both technical and process oriented. Some of the planned topics during the Management Planning are:

- ✓ Business processes of your sales, recruiting and administration teams
- ✓ Corporate structure
- ✓ Applicable tax and workers comp considerations
- ✓ Users and Security
- ✓ Check and Invoice printing
- ✓ Bank transmission files
- ✓ WebPortal branding
- ✓ Hardware and software requirements
- ✓ Data migration plans
- ✓ Implementation planning

The team attending the Management Planning should be able to discuss and make decisions on these various topics. Your entire implementation team may or may not need to be present for the entire Management Planning.

The pages of this workbook describe the drop-down lists (or Code Groups) in Adapt that can be modified to meet the needs of your business processes. You and your team should review this workbook in advance to understand the different areas that will be discussed and designed in the Management Planning session. Doing so will allow the session to be much more productive and efficient.

As you review the workbook, feel free to reach out to your Erecruit Implementation Consultant if you have any questions.





# Manage Lists

**This** section is designed to introduce you to Manage List maintenance and give you a good overview of creating and editing lists.

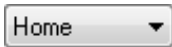
When you are finished with this section, you will:

- ✓ Understand how to add codes to a list
- ✓ Understand how to edit codes in a list
- ✓ Understand how to delete codes in a list
- ✓ Understand how to inactivate codes in a list

# Introduction

No two staffing services are exactly alike. One service may use letters as an overall rating for employees while another might use numbers. One service might want general information from a report while another might like specifics.

Erecruit understands that you don't want to be fit into a mold. To you, Adapt is a tool to be used by you and not vice-versa. Therefore, Adapt was designed with diversity in mind. The lists allow you the flexibility to make Adapt fit your needs.



You have probably used computer programs before that have fields with little arrows on the side. When you click on the arrow, a list of options is presented to you. These options came from a list within the program. In other words, somebody told the program that these were the valid options for this field. In Adapt, that person is you. Most of the drop down boxes (that's its official name) in Adapt are designed to be edited by you.

As you are going through this workbook, you will see several lists. These lists represent the editable lists in the system. Using this workbook and the Management Planning Session, you will decide what should go into these lists. Needless to say, this is not a one person task and your team will be essential in coming up with a good list of values for each drop down box.

# List Concepts

In order to understand how the lists are created and edited, there are a few important concepts to grasp. These concepts are simple, but essential to understand in order to comprehend all that the lists have to offer.

---

## System and User-Defined Lists

---

Lists are divided into two categories: user-defined and system-defined. User-defined lists are determined by your staffing service and may be modified. System defined lists are determined by Erecruit and cannot be changed. Test Names is an example of a user-defined list. It allows you to select the various types of skill tests taken by your candidates. The options in the list are determined by you. States is an example of a system-defined edit list. Erecruit automatically adds all states into the system.

---

## Standard Codes

---

Based on our experiences in the staffing industry, Adapt comes equipped with the most commonly used codes for the user-defined lists. For example, if you open the Reference Relationship list, you will find entries such as Friend, Indirect Supervisor, Peer, etc. These are listed because they are typical to most staffing firms. Your job is to modify the standard user-defined lists based on your specific terminology, ratings, and/or codes. This teaches Adapt your language.

## List Maintenance

**Select List for Maintenance**

☐ Arrival Call Result
 

^

☐ Attire
 

▬

☐ Bank Account Type
 

v

<

>

Code Name

Code

Parent

Parent

Active

Select List

Arrival Call US

Find

Clear

| Code Name                          | Code Description | Parent Name | Parent Description | Active | Web Flag |
|------------------------------------|------------------|-------------|--------------------|--------|----------|
| <input checked="" type="radio"/> L | Late             |             |                    | Yes    |          |
| <input type="radio"/> N            | No Show          |             |                    | Yes    |          |
| <input type="radio"/> O            | On-Time          |             |                    | Yes    |          |

## Selecting a List

1. In the *Select List for Maintenance* area, use the scroll bar to find the list you want to edit.
2. Click the radio button to the left of the list name.
3. Click the **Select List** button.
4. The contents (values or codes) of the list appear in the grid below the Select List button.

**Note:** The Skill list is somewhat different. Since it is possible to have many skills, the system filters the skills presented by the search criteria to the right of the Select List for Maintenance box. You must enter at least three characters in one of the Filtering fields (Code Name, Code Description, Parent Name and/or Parent Description). Click **Find** to open the *Set Filter for List* window, enter your filtering criteria and click **Run**. StaffSuite displays any skill codes that match the filtering criteria.

---

## Adding a Parent Code to a List

---

To add a parent (top-level) code to a list:

1. Without clicking the radio button on any code in the list, click **Add**.
2. The Add Code screen displays.
3. The *Parent* field defaults to <blank>. If you accidentally selected a value in the list before clicking Add and you see a value in this field, click **Cancel** and restart at step 1. NOTE: Some lists do not allow parent/child codes. In this case, you will not see a *Parent* field.
4. In the *Code* field, enter a short Code Name for the code you are adding. Codes must be unique within the list. A Code Name can be as small as 1 character or as large as 8 characters.
5. In the *Description* field, enter a longer description of the code you are adding. It is the Description that shows up on drop down lists within the system.
6. Make sure that the *Active* box is checked.
7. Some lists allow you to designate whether the code should display when using Web Services. Place a check in the *Web Portal* checkbox if you want the code to appear in Web Services. Enter the way you would like the code to appear in the *Web Portal Description* field.
8. Click **Save**.

---

## Adding a Child Code to a List

---

To add a child code to a list:

1. On the code grid, select the code (by clicking the radio button to the left of the code's row) that you want to be the parent of the code you are about to add.
2. Click **Add**.
3. The Add Code screen displays.
4. The *Parent* field displays the code you selected in step 1. If you did not select a code, click **Cancel** and restart at Step 1. NOTE: Some lists do not allow parent/child codes. In this case you will not see a *Parent* field.
5. In the *Code* field, enter a short Code Name for the code you are adding. Codes must be unique within the list. A Code Name can be as small as 1 character or as large as 8 characters.
6. In the *Description* field, enter a longer description of the code you are adding. It is the Description that shows up on drop down lists within the system.
7. Make sure that the *Active* box is checked.
8. Some lists allow you to designate whether the code should display when using Web Services. Place a check in the *Web Portal* checkbox if you want the code to appear in Web Services. Enter the way you would like the code to appear in the *Web Portal Description* field.
9. Click **Save**.

---

## Editing an Existing Code on a List

---

To edit a code that already exists on a list:

1. On the code grid, select the code that you want to edit (by clicking the radio button to the left of the code's row).
2. Click **Edit**.
3. The Edit Code screen displays.
4. Neither the *Parent* field nor the *Code* field may be edited. To set a new parent for a code or to change the code name, delete the original code and add a new one. NOTE: Some lists do not allow parent/child codes. In this case you will not see a *Parent* field.
5. In the *Description* field, edit the text to the description, if desired. It is the Description that shows up on drop down lists within the system.
6. In the *Active* field, click the checkbox to toggle the setting between Active (checked) and Inactive (not checked). Inactive codes do not show up on drop downs.
7. Some lists allow you to designate whether the code should display when using Web Services. Place a check in the *Web Portal* checkbox if you want the code to appear in Web Services. Enter the way you would like the code to appear in the *Web Portal Description* field
8. Once you have made all desired changes, click **Save**.

---

## Deleting an Existing Code on a List

---

You may not delete a code that is used anywhere in the system nor can you delete a parent code without deleting all child codes first. To delete an existing code:

1. On the code grid, select the code you want to delete (by clicking the radio button to the left of the code's row).
2. Click **Delete**.
3. The Delete Code screen displays. Make sure the code displayed is the one you want to delete. To delete the code, click **Delete**. To cancel the deletion, click **Cancel**.



# Lists

**Lists** are groups that contain codes. For example, the Arrival Call Result list has the codes L (Late), N (No Show) and O (On-Time). The Code Descriptions are displayed as dropdown selections (or lookup selections) on various fields. Adapt uses these lists and codes throughout the application to capture data and control business workflows.

This section details each editable list and codes delivered with your system.

# List Customization

The following shows the system-delivered lists that can be customized. You will find a description of the list, some examples of where the field can be found and any system delivered codes. You can use the following tables during your Management Planning Session to determine which lists you want to customize and which codes you want to add, edit or delete.

Some lists allow a parent/child relationship while other lists allow only a one-level hierarchy. If the list allows a parent/child relationship, you will see Parent Name and Parent Description columns in the table. If it only allows a one-level hierarchy, you will only see the Code Name and Code Description columns.

In addition, some lists allow you to select whether you want a specific code to be available on the web portal and if so, how you want the code presented. If this is the case, there will be additional columns for you to enter that information.

The following tables show the lists that allow a Parent Code and those that do not:

| Allows Parent Code                     |                            |                              |                                       |
|----------------------------------------|----------------------------|------------------------------|---------------------------------------|
| Arrival Call Result                    | Attire                     | Candidate Log a Call Outcome | Candidate Ranking                     |
| Certification                          | Client Evaluation Status   | Contact Level                | Contact Log a Call Outcome            |
| Contact Type                           | Degrees                    | GL Account Type              | Healthcare Cancellation Reason        |
| Healthcare Decline Reason              | Healthcare No Offer Reason | Healthcare Offer of Coverage | Healthcare Plans                      |
| Incident Type                          | Industry Sector            | Invoice Template             | Invoice Terms                         |
| Job Category                           | Job Priority               | Metropolitan Areas           | Occupational Code                     |
| Onboarding Group                       | Project Contract Type      | Project Type                 | Reason Assignment/<br>Placement Ended |
| Reason for Leaving Previous Employment | Rehire Reasons             | Salutation Title             | Security Clearance Agency             |
| Security Clearance Level               | Separation Reason          | Shifts                       | Skill                                 |
| Source                                 | Supplier Discipline        | Test Level                   | Test Names                            |
| Topics for Companies                   | Topics for People          | UDF Candidate Code x         | UDF Candidate Multi Code x            |
| UDF Client Code x                      | UDF Client Multi Code x    | UDF Job Order Code x         | UDF Job Order Multi Code x            |
| Visa Type                              | VMS Req Reactivate Reason  | VMS Req Reject Reason        | Void Reason                           |

| Does Not Allow Parent Code |                               |                          |                        |
|----------------------------|-------------------------------|--------------------------|------------------------|
| Bill Group                 | Candidate Availability Notice | Candidate Job Preference | Check Handling         |
| Client Evaluation Result   | Company Service Level         | Contact Job Role         | Division               |
| Invoice Handling US        | Languages                     | Probationary Code        | Reference Relationship |
| Skill Proficiency          |                               |                          |                        |

## Arrival Call Result

An Arrival Call is performed on the first day of a Candidate's Assignment. This list allows you indicate the overall outcome of your call. For example, was the candidate on time, late or missing?

Assignment > Calls and Emails > Log a Call > Arrival

[illegible]

## Attire

Attire allows you to track the preferred dress attire for each company. For example, select “Uniform” if the employees are required to wear a uniform.

## Companies > Policies and Billing

[illegible]

## Bill Group (Back Office Only)

Allows you to process invoices separately that have unique billing requirements. Invoices in different bill groups can be processed in different batches.

Companies > Clients > Policies and Billing > Billing Profile

[illegible]

## Candidate Availability Notice

Notice allows you to document the advance notice each candidate requires to be available for work. For example, select “2 weeks” for candidates who must provide 2 weeks notice to their current employers.

Candidate &gt; Summary

[illegible]

## Candidate Job Preference

Use Preference to distinguish a candidate's choice of employment. For example, select "Direct Hire Only" for Candidates pursuing only full time jobs.

Candidate &gt; Summary

[illegible]

## Candidate Log a Call Outcome

Use Log a Call Outcome to specify the results of a call made to a Candidate. You may not add a parent code to this list. You also may not edit or delete a parent code.

Candidate > Calls and Emails > Log a Call > Outcome

Supplier Candidate > Calls and Emails > Log a Call > Outcome

| Code Name | Code Description                       | Parent Name | Parent Description |
|-----------|----------------------------------------|-------------|--------------------|
| AA        | Accepted Assignment                    | CO          | Conversation       |
| ASCMP     | Refused - Company Not Acceptable       | CO          | Conversation       |
| ASCPT     | Refused - On Assignment via Competitor | CO          | Conversation       |
| ASHRS     | Refused - Hours Not Acceptable         | CO          | Conversation       |
| ASINT     | Refused - Interviewing for Full Time   | CO          | Conversation       |
| ASNOR     | Refused - No Reason                    | CO          | Conversation       |
| ASWCB     | Will Call Back                         | CO          | Conversation       |
| AVA       | Availability - Any Time                | CO          | Conversation       |
| AVL       | Availability - Limited                 | CO          | Conversation       |
| CIL       | Child Illness                          | CO          | Conversation       |
| CNSAP     | Counsel - Appearance                   | CO          | Conversation       |
| CNSAT     | Counsel - Attitude                     | CO          | Conversation       |
| CNSTA     | Counsel - Tardiness                    | CO          | Conversation       |
| CO        | Conversation                           |             |                    |
| IL        | Refused - Illness                      | CO          | Conversation       |
| IP        | In Person                              | LMO         | Left Message       |
| LMO       | Left Message                           |             |                    |
| LTF       | Refused - Location Too Far             | CO          | Conversation       |
| NAO       | No Answer                              |             |                    |
| OV        | Refused - On Vacation                  | CO          | Conversation       |
| PTL       | Refused - Pay Too Low                  | CO          | Conversation       |
| QCE       | Quality Check - Excellent              | CO          | Conversation       |

[illegible]

## Candidate Ranking

Ranking allows you to “score” your candidates. For example: “1” = top quality candidate, “2” = good candidate, etc.

Candidate &gt; Summary

[illegible]

## Certification

Certifications are tracked on candidate and job order records. This allows you to track candidates who possess a certain certification or a job order that requires a certain certification. For example, select “Oracle DBA” for candidates who have acquired this certification or for job orders that require a candidate to have this certification.

By default, the Web Portal Description matches the Code Description and therefore, is not listed in the table below. However, you can change the Web Portal Description in Adapt, if needed.

Candidate > Skills and Education

Job Order > Summary

| Code Name | Code Description            | Parent Name | Parent Description | Web Portal | Web Portal Description |
|-----------|-----------------------------|-------------|--------------------|------------|------------------------|
| ACA       | Avaya Certified Associate   |             |                    | Yes        |                        |
| ACDT      | Apple Desktop Technician    |             |                    | Yes        |                        |
| ACHDS     | Apple Help Desk Specialist  |             |                    | Yes        |                        |
| ACPT      | Apple Portable Technician   |             |                    | Yes        |                        |
| ACSA      | Apply Sys Admin             |             |                    | Yes        |                        |
| ACTC      | Apple Technical Coordinator |             |                    | Yes        |                        |
| ATE       | Adobe Technical Expert      |             |                    | Yes        |                        |
| CCDA      | Cisco CCDA                  |             |                    | Yes        |                        |
| CCDP      | Cisco CCDP                  |             |                    | Yes        |                        |
| CCNA      | Cisco CCNA                  |             |                    | Yes        |                        |
| CCNP      | Cisco CCNP                  |             |                    | Yes        |                        |
| CCSE      | Check Point Security Expert |             |                    | Yes        |                        |
| CCSP      | Cisco CCSP                  |             |                    | Yes        |                        |
| CLPAPP    | CLP Principal App Developer |             |                    | Yes        |                        |
| CLPNTS    | CLP Notes Developer         |             |                    | Yes        |                        |
| CLPSA     | CLP Notes System Admin      |             |                    | Yes        |                        |
| CNA       | Certified Netware Administ. |             |                    | Yes        |                        |
| CNE       | Certified Netware Engineer  |             |                    | Yes        |                        |
| CPA       | Certified Public Accountant |             |                    | Yes        |                        |



Check Handling

This is used to indicate how a candidate receives his/her paycheck. Is it picked up at the branch, mailed or delivered to the candidate?

Candidate > Employee Financial > Payroll/Taxes  
Assignment > Summary

| Code Name | Code Description         |
|-----------|--------------------------|
| DC        | Deliver to Customer Site |
| Fed Ex    | Fed Ex                   |
| HLD       | Hold Check               |
| ML        | Mail Check               |
| OLD       | OnLine Delivery          |
| PCK       | Pickup Check             |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |
|           |                          |

Client Evaluation Result

When recording an assignment evaluation from a client, this list is used to indicate what outcome, if any, results from the evaluation. “Replaced” might be used at the end of an assignment rather than “No Change” if conducted while the Candidate is still working.

Assignment > Add New > QA Activity > Client Evaluation

| Code Name | Code Description |
|-----------|------------------|
| NC        | No Change        |
| RE        | Replaced         |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |
|           |                  |

## Client Evaluation Status

The Status can be used to categorize the stage an evaluation is in with regard to your quality assurance process. For example, has it been “Completed” or are you awaiting feedback from the client (“Open”)?

Assignment > Add New > QA Activity > Client Evaluation

[illegible]

## Company Service Level

If you have or choose to establish service levels for your clients, use this list to track that level. For example, select “Platinum” for your clients who should be provided the maximum level of service.

Company &gt; Summary

[illegible]

## Contact Job Role

Job Role allows you to assign a uniformed title or role to each contact. You may choose to assign a designated “title” as defined by your staffing firm for each contact. This designated “Job Role” will be what your firm internally chooses to categorize the contact as, even though their official title may be something else. For example, select “Manager” for a contact even though their official title could be “branch manager”, “area manager”, “floor manager”, etc.

Contact > Summary

| Code Name | Code Description             |
|-----------|------------------------------|
| 1         | Accounting Manager           |
| 10        | Consultant                   |
| 11        | Controller                   |
| 12        | Director                     |
| 13        | Finance Director             |
| 14        | Finance Manager              |
| 15        | Finance Vice President       |
| 16        | Financial Analyst            |
| 17        | Financial Reporting Director |
| 18        | Financial Reporting Manager  |
| 19        | General Manager              |
| 2         | Assistant Controller         |
| 20        | Human Resources Director     |
| 21        | Human Resources Manager      |
| 22        | Human Resources VP           |
| 23        | Internal Audit Director      |
| 24        | Internal Audit Manager       |
| 25        | Internal Audit Staff         |
| 26        | Investor Relations Director  |
| 27        | IT Director                  |
| 28        | IT Manager                   |
| 29        | IT Network Administrator     |

| Code Name | Code Description              |
|-----------|-------------------------------|
| 3         | Assistant Treasurer           |
| 30        | IT Project Manager            |
| 31        | IT Systems Analyst            |
| 32        | Manager                       |
| 33        | Partner                       |
| 34        | President                     |
| 35        | Professor                     |
| 36        | Staff Accountant              |
| 37        | Tax Accountant                |
| 38        | Tax Director                  |
| 39        | Tax Manager                   |
| 4         | Attorney                      |
| 40        | Tax Vice President            |
| 41        | Treasurer                     |
| 42        | Treasury Vice President       |
| 43        | Vice President                |
| 44        | Risk Management Director      |
| 45        | Risk Management Manager       |
| 46        | IT VP                         |
| 47        | Chief Technology Officer      |
| 48        | Director of Financial Systems |
| 49        | IT Business Analyst           |
| 5         | Chairman                      |
| 50        | Administrative Assistant      |
| 51        | Human Resources Supervisor    |
| 52        | Chief Officer                 |
| 6         | Chief Executive Officer       |
| 7         | Chief Financial Officer       |

[illegible]

## Contact Level

Contact Level tracks the level of authority each contact has within the organization. For example, select “Decision Maker” if the contact has the authority to execute a contract.

Contact &gt; Summary

[illegible]

## Contact Log a Call Outcome

Use Log a Call Outcome to specify the results of a call made to a Contact. You may not add a parent code to this list. You also may not edit or delete a parent code.

Contact > Calls and Emails > Log a Call > Outcome

Supplier Contact > Calls and Emails > Log a Call > Outcome

| Code Name | Code Description                     | Parent Name | Parent Description |
|-----------|--------------------------------------|-------------|--------------------|
| CC        | Cold Call                            | CO          | Conversation       |
| CO        | Conversation                         |             |                    |
| COLAT     | Collection Call - Attorney           | CO          | Conversation       |
| COLIF     | Collection Call - Insufficient Funds | CO          | Conversation       |
| COLPD     | Collection Call - Past Due           | CO          | Conversation       |
| INP       | In Person                            | LMO         | Left Message       |
| JL        | Sales - Job Lead                     | CO          | Conversation       |
| LMO       | Left Message                         |             |                    |
| NAO       | No Answer                            |             |                    |
| PRGFE     | Job Progress - Found Employee        | CO          | Conversation       |
| PRGLG     | Job Progress - Longer Than Expected  | CO          | Conversation       |
| PRGRS     | Job Progress - Ready Soon            | CO          | Conversation       |
| QCE       | Quality Check - Excellent            | CO          | Conversation       |
| QCF       | Quality Check - Fair                 | CO          | Conversation       |
| QCG       | Quality Check - Good                 | CO          | Conversation       |
| QCP       | Quality Check - Poor                 | CO          | Conversation       |
| RP        | Sales - Rates Presentation           | CO          | Conversation       |
| SALIC     | Sales - Introductory Call            | CO          | Conversation       |
| SL        | Scheduled Later                      | NAO         | No Answer          |
| SM        | Sales - Skill Marketing              | CO          | Conversation       |
| SR        | Sales - Service Review               | CO          | Conversation       |
| ST        | Sent Text                            | NAO         | No Answer          |



## Contact Type

Type allows you to classify your contacts based on how they are associated with your firm. For example, select “left company” if the contact no longer works with the company, but you still want to track their information until you have a new company with which to associate them.

Contact > Summary

| Code Name | Code Description  | Parent Name | Parent Description |
|-----------|-------------------|-------------|--------------------|
| ACT       | Active            |             |                    |
| AMGR      | Account Manager   |             |                    |
| ARC       | Archival          |             |                    |
| ASST      | Assistant         |             |                    |
| BILL      | Billing           |             |                    |
| C         | Client            |             |                    |
| DECM      | Decision Maker    |             |                    |
| DEL       | Delete            |             |                    |
| DNA       | Do Not Approach   |             |                    |
| HIR       | Hiring Manager    |             |                    |
| HRM       | HR Manager        |             |                    |
| HRS       | Hiring Supervisor |             |                    |
| LC        | Left Company      |             |                    |
| MISC      | Misc              |             |                    |
| NOIN      | No Interest       |             |                    |
| OTH       | Other             |             |                    |
| PASE      | Past Employer     |             |                    |
| REC       | Recommender       |             |                    |
| REF       | Referral          |             |                    |
| SUPER     | Supervisor        |             |                    |
| SUPP      | Supplier          |             |                    |
| UNKN      | Unknown           |             |                    |
| VEND      | Vendor            |             |                    |

[illegible]

# Degrees

Some jobs will require a certain degree or level of education. This list helps track that information. For example, select “Master of Arts” for jobs that require the candidate to have an MA degree.

Job Order &gt; Summary

[illegible]

## Division

Division is used to track the division of your firm with which records are associated. A default division is assigned to each branch and then applied to records during creation based on the creating User's default branch.

Found on most records on the Summary screen.

[illegible]

## GL Account Type

GL Account Type allows you to indicate the type of account you are adding to your Chart of Accounts.

Financials > Financial Processing > General Ledger Process > Chart of Accounts > Add/Edit.

[illegible]

## Healthcare Cancellation Reason

Healthcare Cancellation Reason indicates why healthcare coverage was cancelled for the employee. This allows you to comply with Affordable Care Act (ACA) requirements.

Selected when completing the Healthcare Cancellation workflow.

[illegible]

## Healthcare Decline Reason

Healthcare Decline Reason indicates why the employee declined healthcare coverage. This allows you to comply with Affordable Care Act (ACA) requirements.

Selected when completing the Healthcare Decline workflow.

[illegible]

Healthcare No Offer Reason indicates why healthcare coverage was not offered to the employee. This allows you to comply with Affordable Care Act (ACA) requirements.

[illegible]

## Healthcare Offer of Coverage

Healthcare Offer of Coverage contains a series of IRS codes used to report year-end information concerning the Affordable Care Act (ACA). You should periodically consult the IRS for the newest list of codes and update this list as needed.

Selected when completing the Healthcare Offer, No Offer or Cancellation workflows.

[illegible]

The Healthcare Plans list indicates the type of plan accepted by the employee. This allows you to comply with Affordable Care Act (ACA) requirements.

[illegible]

This is used to classify incidents that are recorded from assignments. Commonly used Types are “Injury” or “Rule Violation”.

[illegible]

## Industry Sector

Industry Sector provides a searchable way to track each company's business type(s). For example, select "Banking" if the company's primary business is banking.

Company > Summary

| Code Name | Code Description                           | Parent Name | Parent Description                     |
|-----------|--------------------------------------------|-------------|----------------------------------------|
| BUS       | Business Services                          |             |                                        |
| BUS001    | Audio/Visual                               | BUS         | Business Services                      |
| BUS002    | Business Centres                           | BUS         | Business Services                      |
| BUS003    | Business Consultancy                       | BUS         | Business Services                      |
| BUS004    | Business Travel                            | BUS         | Business Services                      |
| BUS005    | Cleaning                                   | BUS         | Business Services                      |
| BUS006    | Estate Agents/Valuers                      | BUS         | Business Services                      |
| BUS007    | Exhibition/Event Organizers                | BUS         | Business Services                      |
| BUS008    | General Business and Professional Services | BUS         | Business Services                      |
| BUS009    | Import/Export                              | BUS         | Business Services                      |
| BUS010    | Legal Services                             | BUS         | Business Services                      |
| BUS011    | Outsourcing/Call Centre                    | BUS         | Business Services                      |
| BUS012    | Postal/Courier Services                    | BUS         | Business Services                      |
| BUS013    | PR/Advertising/Marketing                   | BUS         | Business Services                      |
| BUS014    | Printing & Publishing                      | BUS         | Business Services                      |
| BUS015    | Recruitment                                | BUS         | Business Services                      |
| BUS016    | Security                                   | BUS         | Business Services                      |
| ENG       | Engineering/Construction/Manufacturing     |             |                                        |
| ENG001    | Architects/Surveyors                       | ENG         | Engineering/Construction/Manufacturing |
| ENG002    | Building/Construction                      | ENG         | Engineering/Construction/Manufacturing |
| ENG003    | Electrical                                 | ENG         | Engineering/Construction/Manufacturing |

| Code Name | Code Description             | Parent Name | Parent Description                         |
|-----------|------------------------------|-------------|--------------------------------------------|
| ENG004    | Household/Toiletries         | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG005    | Iron/Steel/Metals            | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG006    | Machinery                    | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG007    | Mining                       | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG008    | Paper Manufacturers          | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG009    | Plastic & Glass              | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG010    | Rubber and Rubber Goods      | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG011    | Textile                      | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG012    | Timber                       | ENG         | Engineering/Construction/<br>Manufacturing |
| ENG013    | Tobacco                      | ENG         | Engineering/Construction/<br>Manufacturing |
| FAB       | Finance and Banking          |             |                                            |
| FAB001    | Accountancy                  | FAB         | Finance and Banking                        |
| FAB002    | Banking                      | FAB         | Finance and Banking                        |
| FAB003    | Building Societies           | FAB         | Finance and Banking                        |
| FAB004    | Financial Services           | FAB         | Finance and Banking                        |
| FAB005    | Insurance                    | FAB         | Finance and Banking                        |
| ITT       | IT/Telecoms                  |             |                                            |
| ITT001    | Computer Hardware            | ITT         | IT/Telecoms                                |
| ITT002    | Computer Software            | ITT         | IT/Telecoms                                |
| ITT003    | IT Consultancy               | ITT         | IT/Telecoms                                |
| ITT004    | Telecommunications & Cable   | ITT         | IT/Telecoms                                |
| NFP       | Not For Profit               |             |                                            |
| NFP001    | Charities                    | NFP         | Not for Profit                             |
| NFP002    | Clubs/Societies/Associations | NFP         | Not for Profit                             |

| Code Name | Code Description              | Parent Name | Parent Description                |
|-----------|-------------------------------|-------------|-----------------------------------|
| NFP003    | Religions                     | NFP         | Not for Profit                    |
| OTH       | Other                         |             |                                   |
| OTH001    | Agriculture/Farming           | OTH         | Other                             |
| OTH002    | Entertainment                 | OTH         | Other                             |
| OTH003    | Film/TV/Radio                 | OTH         | Other                             |
| OTH004    | Legal                         | OTH         | Other                             |
| OTH005    | Private Schools and Colleges  | OTH         | Other                             |
| PPH       | Pharmaceuticals/Petrochemical |             |                                   |
| PPH001    | Chemicals                     | PPH         | Pharmaceuticals/<br>Petrochemical |
| PPH002    | Explosives                    | PPH         | Pharmaceuticals/<br>Petrochemical |
| PPH003    | Petrol/Oil/Fuel               | PPH         | Pharmaceuticals/<br>Petrochemical |
| PPH004    | Pharmaceuticals               | PPH         | Pharmaceuticals/<br>Petrochemical |
| PUB       | Public Sector                 |             |                                   |
| PUB001    | Armed Forces                  | PUB         | Public Sector                     |
| PUB002    | Care                          | PUB         | Public Sector                     |
| PUB003    | Central Government            | PUB         | Public Sector                     |
| PUB004    | Development Agencies          | PUB         | Public Sector                     |
| PUB005    | Education                     | PUB         | Public Sector                     |
| PUB006    | Housing Associations          | PUB         | Public Sector                     |
| PUB007    | Libraries                     | PUB         | Public Sector                     |
| PUB008    | Local Government              | PUB         | Public Sector                     |
| PUB009    | Museums & Galleries           | PUB         | Public Sector                     |
| PUB010    | Non-PASA Hospital/Healthcare  | PUB         | Public Sector                     |
| PUB011    | PASA                          | PUB         | Public Sector                     |
| PUB012    | Prisons                       | PUB         | Public Sector                     |
| PUB013    | Public Services               | PUB         | Public Sector                     |
| PUB014    | Tourist Authorities           | PUB         | Public Sector                     |

| Code Name | Code Description                  | Parent Name | Parent Description |
|-----------|-----------------------------------|-------------|--------------------|
| RET       | Retail                            |             |                    |
| RET001    | Fashion                           | RET         | Retail             |
| RET002    | Food/Beverage/Catering            | RET         | Retail             |
| RET003    | Gaming                            | RET         | Retail             |
| RET004    | General Retailers                 | RET         | Retail             |
| RET005    | Hotel/Leisure/Restaurant          | RET         | Retail             |
| RET006    | Retail Travel                     | RET         | Retail             |
| TRA       | Transport                         |             |                    |
| TRA001    | Freight/Haulage                   | TRA         | Transport          |
| TRA002    | Storage, Distribution & Packaging | TRA         | Transport          |
| TRA003    | Transport Contractors             | TRA         | Transport          |
| TRA004    | Vehicle Dealers                   | TRA         | Transport          |
| TRA005    | Vehicle Manufacturers             | TRA         | Transport          |
| TRV       | Travel                            |             |                    |
| TRV001    | Airlines                          | TRV         | Travel             |
| TRV002    | Other Public Transport            | TRV         | Travel             |
| TRV003    | Rail                              | TRV         | Travel             |
| TRV004    | Tour Operators                    | TRV         | Travel             |
| UTI       | Utilities                         |             |                    |
| UTI001    | Electricity & Gas                 | UTI         | Utilities          |
| UTI002    | Water                             | UTI         | Utilities          |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |
|           |                                   |             |                    |

[illegible]

This list is used to track how a company/contact expects to receive invoices (via “Mail” or other specified means).

[illegible]



## Invoice Terms

This list is used to track the terms concerning payment of an invoice sent to a company (e.g., Due Upon Receipt, Net 30, etc.)

Back Office: Company > Company Financial > Summary

Front Office: Direct Hire Placement > Create Invoice

[illegible]

## Job Category

The values in this list are used to define the types of jobs a Candidate has performed, as well as the type of job associated with a Job Order.

By default, the Web Portal Description matches the Code Description and therefore, is not listed in the table below. However, you can change the Web Portal Description in Adapt, if needed.

Candidate > Summary

Job Order > Summary

| Code Name | Code Description           | Parent Name | Parent Description         | Web Portal | Web Portal Description |
|-----------|----------------------------|-------------|----------------------------|------------|------------------------|
| ACC       | Accounting                 |             |                            | Yes        |                        |
| ACC0006   | A/P Clerk                  | ACC006      | Accounts Payable Clerk     | Yes        |                        |
| ACC0007   | A/P Manager                | ACC007      | Accounts Payable Manager   | Yes        |                        |
| ACC0008   | A/P Supervisor             | ACC008      | Account Payable Supervisor | Yes        |                        |
| ACC001    | Accountant                 | ACC         | Accounting                 | Yes        |                        |
| ACC002    | Qualified Accountant       | ACC         | Accounting                 | Yes        |                        |
| ACC003    | Accounting Assistant       | ACC         | Accounting                 | Yes        |                        |
| ACC004    | Accounting Supervisor      | ACC         | Accounting                 | Yes        |                        |
| ACC005    | Accounting Team Leader     | ACC         | Accounting                 | Yes        |                        |
| ACC006    | Accounts Payable Clerk     | ACC         | Accounting                 | Yes        |                        |
| ACC007    | Accounts Payable Manager   | ACC         | Accounting                 | Yes        |                        |
| ACC008    | Account Payable Supervisor | ACC         | Accounting                 | Yes        |                        |
| ACC009    | Billing Clerk              | ACC         | Accounting                 | Yes        |                        |
| ACC010    | Bookkeeper                 | ACC         | Accounting                 | Yes        |                        |
| ACC011    | Customer Advisor           | ACC         | Accounting                 | Yes        |                        |
| ACC012    | Financial Advisor          | ACC         | Accounting                 | Yes        |                        |
| ACC013    | Mortgage Advisor           | ACC         | Accounting                 | Yes        |                        |
| ACC014    | Pension Advisor            | ACC         | Accounting                 | Yes        |                        |
| ACC015    | Director of Finance        | ACC         | Accounting                 | Yes        |                        |

| <b>Code Name</b> | <b>Code Description</b>       | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ACC016           | Director of Taxation          | ACC                | Accounting                | Yes               |                               |
| ACC017           | Divisional Accountant         | ACC                | Accounting                | Yes               |                               |
| ACC018           | Audit Clerk                   | ACC                | Accounting                | Yes               |                               |
| ACC019           | Audit Manager                 | ACC                | Accounting                | Yes               |                               |
| ACC020           | Audit Specialist              | ACC                | Accounting                | Yes               |                               |
| ACC021           | Auditor                       | ACC                | Accounting                | Yes               |                               |
| ACC022           | Budget Accountant             | ACC                | Accounting                | Yes               |                               |
| ACC023           | Capital Accountant            | ACC                | Accounting                | Yes               |                               |
| ACC024           | Chief Accountant              | ACC                | Accounting                | Yes               |                               |
| ACC025           | Chief Financial Accountant    | ACC                | Accounting                | Yes               |                               |
| ACC026           | Chief Management Accountant   | ACC                | Accounting                | Yes               |                               |
| ACC027           | Credit Manager                | ACC                | Accounting                | Yes               |                               |
| ACC028           | Credit Supervisor             | ACC                | Accounting                | Yes               |                               |
| ACC029           | Director of Accounting        | ACC                | Accounting                | Yes               |                               |
| ACC030           | Director of Commission        | ACC                | Accounting                | Yes               |                               |
| ACC031           | Financial Analyst             | ACC                | Accounting                | Yes               |                               |
| ACC032           | Financial Manager             | ACC                | Accounting                | Yes               |                               |
| ACC033           | Financial Reporting Manager   | ACC                | Accounting                | Yes               |                               |
| ACC034           | Financial Accountant          | ACC                | Accounting                | Yes               |                               |
| ACC035           | Assistant Controller          | ACC                | Accounting                | Yes               |                               |
| ACC036           | Controller                    | ACC                | Accounting                | Yes               |                               |
| ACC037           | Insurance Clerk               | ACC                | Accounting                | Yes               |                               |
| ACC038           | Internal Auditor              | ACC                | Accounting                | Yes               |                               |
| ACC039           | Junior Accountant             | ACC                | Accounting                | Yes               |                               |
| ACC040           | Management Accountant         | ACC                | Accounting                | Yes               |                               |
| ACC041           | Oracle Payroll Project leader | ACC                | Accounting                | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>              | <b>Parent Name</b> | <b>Parent Description</b>   | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|--------------------------------------|--------------------|-----------------------------|-------------------|-------------------------------|
| ACC042           | Payroll Manager/ Supervisor          | ACC                | Accounting                  | Yes               |                               |
| ACC043           | Pensions Administrator               | ACC                | Accounting                  | Yes               |                               |
| ACC045           | Premiums Clerk                       | ACC                | Accounting                  | Yes               |                               |
| ACC046           | Project Accountant                   | ACC                | Accounting                  | Yes               |                               |
| ACC047           | Sales Ledger Supervisor              | ACC                | Accounting                  | Yes               |                               |
| ACC049           | Senior Accountant                    | ACC                | Accounting                  | Yes               |                               |
| ACC050           | Staff Accountant                     | ACC                | Accounting                  | Yes               |                               |
| ACC051           | Systems Accountant                   | ACC                | Accounting                  | Yes               |                               |
| ACC052           | Tax Consultant                       | ACC                | Accounting                  | Yes               |                               |
| ACC053           | Tax Manager                          | ACC                | Accounting                  | Yes               |                               |
| ACC054           | Treasurer                            | ACC                | Accounting                  | Yes               |                               |
| ACC055           | Underwriter                          | ACC                | Accounting                  | Yes               |                               |
| ADM              | Administration                       |                    |                             | Yes               |                               |
| ADM001           | Administrative Assistant             | ADM                | Administration              | Yes               |                               |
| ADM002           | Administrative Clerk                 | ADM                | Administration              | Yes               |                               |
| ADM0021          | CSR                                  | ADM021             | Customer Service Supervisor | Yes               |                               |
| ADM0025          | Administrative Manager               | ADM025             | Office Manager              | Yes               |                               |
| ADM003           | Administrative General               | ADM                | Administration              | Yes               |                               |
| ADM0030          | Human Resources Assistant            | ADM030             | HR Assistant                | Yes               |                               |
| ADM004           | Administrative Operations Specialist | ADM                | Administration              | Yes               |                               |
| ADM005           | Administrative Policy Specialist     | ADM                | Administration              | Yes               |                               |
| ADM006           | Fleet Administrator                  | ADM                | Administration              | Yes               |                               |
| ADM007           | Customer Service Adviser             | ADM                | Administration              | Yes               |                               |
| ADM008           | Data Entry Clerk                     | ADM                | Administration              | Yes               |                               |
| ADM009           | Personal Assistant                   | ADM                | Administration              | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>           | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-----------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ADM010           | Bi-lingual Customer Service Agent | ADM                | Administration            | Yes               |                               |
| ADM011           | Business Support Administrator    | ADM                | Administration            | Yes               |                               |
| ADM012           | Claims Coordinator                | ADM                | Administration            | Yes               |                               |
| ADM013           | Claims Administrator              | ADM                | Administration            | Yes               |                               |
| ADM014           | Classified Administrator          | ADM                | Administration            | Yes               |                               |
| ADM015           | Clerk Typist                      | ADM                | Administration            | Yes               |                               |
| ADM016           | Clinical Administrator            | ADM                | Administration            | Yes               |                               |
| ADM017           | Contract Administrator            | ADM                | Administration            | Yes               |                               |
| ADM018           | Customer Account Manager          | ADM                | Administration            | Yes               |                               |
| ADM019           | Customer Service Coordinator      | ADM                | Administration            | Yes               |                               |
| ADM020           | Customer Service Administrator    | ADM                | Administration            | Yes               |                               |
| ADM021           | Customer Service Supervisor       | ADM                | Administration            | Yes               |                               |
| ADM022           | Customer Service Representative   | ADM                | Administration            | Yes               |                               |
| ADM023           | Office Administrator              | ADM                | Administration            | Yes               |                               |
| ADM024           | Office Assistant                  | ADM                | Administration            | Yes               |                               |
| ADM025           | Office Manager                    | ADM                | Administration            | Yes               |                               |
| ADM026           | Document Controller               | ADM                | Administration            | Yes               |                               |
| ADM027           | Executive Assistant               | ADM                | Administration            | Yes               |                               |
| ADM028           | Executive Secretary               | ADM                | Administration            | Yes               |                               |
| ADM029           | Office Clerk                      | ADM                | Administration            | Yes               |                               |
| ADM030           | HR Assistant                      | ADM                | Administration            | Yes               |                               |
| ADM031           | Legal Assistant                   | ADM                | Administration            | Yes               |                               |
| ADM032           | Medical Assistant                 | ADM                | Administration            | Yes               |                               |
| ADM033           | Logistics Administrator           | ADM                | Administration            | Yes               |                               |
| ADM034           | Organizational Manager            | ADM                | Administration            | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>       | <b>Parent Name</b> | <b>Parent Description</b>  | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------------|--------------------|----------------------------|-------------------|-------------------------------|
| ADM035           | Personnel Administrator       | ADM                | Administration             | Yes               |                               |
| ADM036           | Personal Coordinator          | ADM                | Administration             | Yes               |                               |
| ADM037           | Receptionist                  | ADM                | Administration             | Yes               |                               |
| ADM038           | Sales Secretary               | ADM                | Administration             | Yes               |                               |
| ADM039           | Sales Assistant               | ADM                | Administration             | Yes               |                               |
| ADM040           | Shipping Administrator        | ADM                | Administration             | Yes               |                               |
| ADM041           | Shipping Clerk                | ADM                | Administration             | Yes               |                               |
| ADM042           | Travel Services Administrator | ADM                | Administration             | Yes               |                               |
| APC              | AP Clerk                      | ACC006             | Accounts Payable Clerk     | Yes               |                               |
| APM              | AP Manager                    | ACC007             | Accounts Payable Manager   | Yes               |                               |
| APMech           | Aircraft Mechanics            | INDS               | Industrial/Service         | Yes               |                               |
| APS              | AP Supervisor                 | ACC008             | Account Payable Supervisor | Yes               |                               |
| BilClr           | Billing Clerks                | ADM                | Administration             | Yes               |                               |
| ConsExt          | Construction and Extraction   | INDS               | Industrial/Service         | Yes               |                               |
| ConsLbr          | Construction Laborers         | INDS               | Industrial/Service         | Yes               |                               |
| CrdtAth          | Credit Authorizers            | ADM                | Administration             | Yes               |                               |
| DBA              | DBA                           | ITT12              | Database Administrator     | Yes               |                               |
| EDA              | Educational/Art               |                    |                            | Yes               |                               |
| EDA01            | Artist                        | EDA                | Educational/Art            | Yes               |                               |
| EDA02            | Designer                      | EDA                | Educational/Art            | Yes               |                               |
| EDA03            | Drafting Technician           | EDA                | Educational/Art            | Yes               |                               |
| EDA04            | Design Technician             | EDA                | Educational/Art            | Yes               |                               |
| EDA05            | Graphic Designer              | EDA                | Educational/Art            | Yes               |                               |
| EDA06            | Graphic Production Specialist | EDA                | Educational/Art            | Yes               |                               |
| EDA07            | Illustrator                   | EDA                | Educational/Art            | Yes               |                               |
| EDA08            | Imaging Specialist            | EDA                | Educational/Art            | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>  | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|--------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| EDA09            | Imaging Technician       | EDA                | Educational/Art           | Yes               |                               |
| EDA10            | Museum Host              | EDA                | Educational/Art           | Yes               |                               |
| EDA11            | Photographer             | EDA                | Educational/Art           | Yes               |                               |
| EDA12            | Still Imaging Specialist | EDA                | Educational/Art           | Yes               |                               |
| EDA13            | Summer Teacher           | EDA                | Educational/Art           | Yes               |                               |
| EDA14            | Teacher                  | EDA                | Educational/Art           | Yes               |                               |
| EDA15            | School Helper            | EDA                | Educational/Art           | Yes               |                               |
| EDA16            | Classroom Helper         | EDA                | Educational/Art           | Yes               |                               |
| FstLnSup         | First Line Supervisors   | INDS               | Industrial/Service        | Yes               |                               |
| INDS             | Industrial/Service       |                    |                           | Yes               |                               |
| INDS001          | Area Work Coordinator    | INDS               | Industrial/Service        | Yes               |                               |
| INDS002          | Area Work Supervisor     | INDS               | Industrial/Service        | Yes               |                               |
| INDS003          | Bartender                | INDS               | Industrial/Service        | Yes               |                               |
| INDS004          | Warehouse Assistant      | INDS               | Industrial/Service        | Yes               |                               |
| INDS005          | Carpenter                | INDS               | Industrial/Service        | Yes               |                               |
| INDS006          | Chauffeur                | INDS               | Industrial/Service        | Yes               |                               |
| INDS007          | Construction Inspector   | INDS               | Industrial/Service        | Yes               |                               |
| INDS008          | Driver                   | INDS               | Industrial/Service        | Yes               |                               |
| INDS009          | Electrician              | INDS               | Industrial/Service        | Yes               |                               |
| INDS010          | Equipment Operator       | INDS               | Industrial/Service        | Yes               |                               |
| INDS011          | Gardener                 | INDS               | Industrial/Service        | Yes               |                               |
| INDS012          | Housing Coordinator      | INDS               | Industrial/Service        | Yes               |                               |
| INDS014          | Loader/Unloader          | INDS               | Industrial/Service        | Yes               |                               |
| INDS017          | Housing Specialist       | INDS               | Industrial/Service        | Yes               |                               |
| INDS018          | Industrial Electrician   | INDS               | Industrial/Service        | Yes               |                               |
| INDS019          | Industrial Engineer      | INDS               | Industrial/Service        | Yes               |                               |
| INDS020          | Maintenance Manager      | INDS               | Industrial/Service        | Yes               |                               |
| INDS021          | Mail Clerk               | INDS               | Industrial/Service        | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>         | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|---------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| INDS022          | Maintenance Mechanic            | INDS               | Industrial/Service        | Yes               |                               |
| INDS023          | Maintenance Supervisor          | INDS               | Industrial/Service        | Yes               |                               |
| INDS024          | Maintenance Technician          | INDS               | Industrial/Service        | Yes               |                               |
| INDS025          | Manufacturing Supervisor        | INDS               | Industrial/Service        | Yes               |                               |
| INDS026          | Packing Engineer                | INDS               | Industrial/Service        | Yes               |                               |
| INDS027          | Plant Manager                   | INDS               | Industrial/Service        | Yes               |                               |
| INDS028          | Process Engineer                | INDS               | Industrial/Service        | Yes               |                               |
| INDS029          | Production Engineer             | INDS               | Industrial/Service        | Yes               |                               |
| INDS030          | Production Manager              | INDS               | Industrial/Service        | Yes               |                               |
| INDS031          | Production Supervisor           | INDS               | Industrial/Service        | Yes               |                               |
| INDS032          | Production Worker               | INDS               | Industrial/Service        | Yes               |                               |
| INDS033          | Project Engineer                | INDS               | Industrial/Service        | Yes               |                               |
| INDS034          | Quality Control Manager         | INDS               | Industrial/Service        | Yes               |                               |
| INDS035          | Reservationist                  | INDS               | Industrial/Service        | Yes               |                               |
| INDS036          | Resident Manager                | INDS               | Industrial/Service        | Yes               |                               |
| INDS037          | Transport Specialist            | INDS               | Industrial/Service        | Yes               |                               |
| INDS038          | Warehouse Manager               | INDS               | Industrial/Service        | Yes               |                               |
| INDS039          | Warehouse Shipping Specialist   | INDS               | Industrial/Service        | Yes               |                               |
| INDS040          | Waste Management Specialist     | INDS               | Industrial/Service        | Yes               |                               |
| INDS041          | Construction Estimator          | INDS               | Industrial/Service        | Yes               |                               |
| INDS042          | Construction Project Manager    | INDS               | Industrial/Service        | Yes               |                               |
| InstWkr          | Installation Workers            | INDS               | Industrial/Service        | Yes               |                               |
| ITT              | IT/Technical                    |                    |                           | Yes               |                               |
| ITT01            | Computer Engineer               | ITT                | IT/Technical              | Yes               |                               |
| ITT02            | Computer Information Specialist | ITT                | IT/Technical              | Yes               |                               |
| ITT03            | Multimedia Designer             | ITT                | IT/Technical              | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>       | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ITT04            | Multimedia Developer          | ITT                | IT/Technical              | Yes               |                               |
| ITT06            | Java Developer                | ITT                | IT/Technical              | Yes               |                               |
| ITT07            | Java Programmer               | ITT                | IT/Technical              | Yes               |                               |
| ITT08            | Java/J2EE Tester              | ITT                | IT/Technical              | Yes               |                               |
| ITT11            | Computer Technician           | ITT                | IT/Technical              | Yes               |                               |
| ITT12            | Database Administrator        | ITT                | IT/Technical              | Yes               |                               |
| ITT13            | Database Migration Specialist | ITT                | IT/Technical              | Yes               |                               |
| ITT15            | Network Analyst               | ITT                | IT/Technical              | Yes               |                               |
| ITT16            | Network Engineer              | ITT                | IT/Technical              | Yes               |                               |
| ITT18            | Operations Manager            | ITT                | IT/Technical              | Yes               |                               |
| ITT20            | VB/GUI Developer              | ITT                | IT/Technical              | Yes               |                               |
| ITT21            | Desktop Support Specialist    | ITT                | IT/Technical              | Yes               |                               |
| ITT22            | Data Analyst                  | ITT                | IT/Technical              | Yes               |                               |
| ITT23            | Database Developer            | ITT                | IT/Technical              | Yes               |                               |
| ITT24            | SAN Network Engineer          | ITT                | IT/Technical              | Yes               |                               |
| ITT25            | SAP Engineer                  | ITT                | IT/Technical              | Yes               |                               |
| ITT26            | SAS Developer                 | ITT                | IT/Technical              | Yes               |                               |
| ITT27            | SAS Programmer                | ITT                | IT/Technical              | Yes               |                               |
| ITT28            | SQL Business Analyst          | ITT                | IT/Technical              | Yes               |                               |
| ITT29            | SQL Database Architect        | ITT                | IT/Technical              | Yes               |                               |
| ITT30            | SQL/OLAP Developer            | ITT                | IT/Technical              | Yes               |                               |
| ITT31            | SVT Engineer                  | ITT                | IT/Technical              | Yes               |                               |
| ITT32            | Database Engineer             | ITT                | IT/Technical              | Yes               |                               |
| ITT33            | Design Engineer               | ITT                | IT/Technical              | Yes               |                               |
| ITT34            | Server Developer              | ITT                | IT/Technical              | Yes               |                               |
| ITT35            | Software Developer            | ITT                | IT/Technical              | Yes               |                               |
| ITT36            | Software Engineer             | ITT                | IT/Technical              | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>              | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|--------------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ITT37            | Security System Admin                | ITT                | IT/Technical              | Yes               |                               |
| ITT38            | Solution Architect                   | ITT                | IT/Technical              | Yes               |                               |
| ITT40            | System Administrator                 | ITT                | IT/Technical              | Yes               |                               |
| ITT41            | System Architect                     | ITT                | IT/Technical              | Yes               |                               |
| ITT42            | System Engineer                      | ITT                | IT/Technical              | Yes               |                               |
| ITT43            | Electrical Engineer                  | ITT                | IT/Technical              | Yes               |                               |
| ITT44            | Electrical Safety Engineer           | ITT                | IT/Technical              | Yes               |                               |
| ITT45            | Hardware Engineer                    | ITT                | IT/Technical              | Yes               |                               |
| ITT46            | Cobol As/400 Engineer                | ITT                | IT/Technical              | Yes               |                               |
| ITT47            | Configuration Manager                | ITT                | IT/Technical              | Yes               |                               |
| ITT48            | Help Desk                            | ITT                | IT/Technical              | Yes               |                               |
| ITT49            | IT Manager                           | ITT                | IT/Technical              | Yes               |                               |
| ITT50            | Lab Associate                        | ITT                | IT/Technical              | Yes               |                               |
| ITT51            | Lab Associate Technician             | ITT                | IT/Technical              | Yes               |                               |
| ITT52            | MIS Manager                          | ITT                | IT/Technical              | Yes               |                               |
| ITT53            | Security Analyst                     | ITT                | IT/Technical              | Yes               |                               |
| ITT54            | Network Designer                     | ITT                | IT/Technical              | Yes               |                               |
| ITT55            | Field Engineer                       | ITT                | IT/Technical              | Yes               |                               |
| ITT56            | Support Engineer                     | ITT                | IT/Technical              | Yes               |                               |
| ITT57            | System Design Engineer               | ITT                | IT/Technical              | Yes               |                               |
| ITT58            | Systems Analyst                      | ITT                | IT/Technical              | Yes               |                               |
| ITT59            | Technical Administrative Team Leader | ITT                | IT/Technical              | Yes               |                               |
| ITT60            | Technical Illustrator                | ITT                | IT/Technical              | Yes               |                               |
| ITT61            | Technical Recruiter                  | ITT                | IT/Technical              | Yes               |                               |
| ITT62            | Technical Supporter                  | ITT                | IT/Technical              | Yes               |                               |
| ITT64            | Technician                           | ITT                | IT/Technical              | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>    | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|----------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ITT66            | Telecom Specialist         | ITT                | IT/Technical              | Yes               |                               |
| ITT68            | WAN Specialist             | ITT                | IT/Technical              | Yes               |                               |
| ITT69            | Web Administrator          | ITT                | IT/Technical              | Yes               |                               |
| ITT70            | Web Designer               | ITT                | IT/Technical              | Yes               |                               |
| ITT71            | Web Developer              | ITT                | IT/Technical              | Yes               |                               |
| LEG              | Legal                      |                    |                           | Yes               |                               |
| LEG001           | Lawyer                     | LEG01              | Attorney                  | Yes               |                               |
| LEG01            | Attorney                   | LEG                | Legal                     | Yes               |                               |
| LEG02            | Corporate Counsel          | LEG                | Legal                     | Yes               |                               |
| LEG03            | Paralegal                  | LEG                | Legal                     | Yes               |                               |
| LEG031           | Litigation Paralegal       | LEG03              | Paralegal                 | Yes               |                               |
| LEG032           | Regulatory Paralegal       | LEG03              | Paralegal                 | Yes               |                               |
| LEG033           | Corporate Paralegal        | LEG03              | Paralegal                 | Yes               |                               |
| LEG04            | Legal Executive Assistant  | LEG                | Legal                     | Yes               |                               |
| LEG05            | Legal Secretary            | LEG                | Legal                     | Yes               |                               |
| LEG06            | Litigation Clerk           | LEG                | Legal                     | Yes               |                               |
| LnClrk           | Loan Clerks                | ADM                | Administration            | Yes               |                               |
| MailClr          | Mail Clerks                | ADM                | Administration            | Yes               |                               |
| MED              | Medical                    |                    |                           | Yes               |                               |
| MED01            | Healthcare Recruiter       | MED                | Medical                   | Yes               |                               |
| MED02            | Inpatient Coders           | MED                | Medical                   | Yes               |                               |
| MED03            | Outpatient Coders          | MED                | Medical                   | Yes               |                               |
| MED04            | Physical Therapist         | MED                | Medical                   | Yes               |                               |
| MED05            | Medical Administrator      | MED                | Medical                   | Yes               |                               |
| MED06            | Medical Billing Supervisor | MED                | Medical                   | Yes               |                               |
| MED07            | Medical Data Entry Clerk   | MED                | Medical                   | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>                   | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| MED08            | Medical Records Analyst                   | MED                | Medical                   | Yes               |                               |
| MED09            | Medical Secretary                         | MED                | Medical                   | Yes               |                               |
| MED10            | Medical Billing Manager                   | MED                | Medical                   | Yes               |                               |
| Mllwr            | Millwrights                               | INDS               | Industrial/Service        | Yes               |                               |
| OfcMchRp         | Office Machine Repairers                  | INDS               | Industrial/Service        | Yes               |                               |
| OrdFillr         | Order Fillers                             | ADM                | Administration            | Yes               |                               |
| Pntrs            | Painters                                  | INDS               | Industrial/Service        | Yes               |                               |
| PPEC             | Production Planning and Expediting Clerks | ADM                | Administration            | Yes               |                               |
| PSR              | Professional Services                     |                    |                           | Yes               |                               |
| PSR01            | Analyst                                   | PSR                | Professional Services     | Yes               |                               |
| PSR02            | Associate Deputy Director                 | PSR                | Professional Services     | Yes               |                               |
| PSR03            | Associate Director                        | PSR                | Professional Services     | Yes               |                               |
| PSR04            | Benefits Representative                   | PSR                | Professional Services     | Yes               |                               |
| PSR05            | Benefits Team Leader                      | PSR                | Professional Services     | Yes               |                               |
| PSR06            | Business Analyst                          | PSR                | Professional Services     | Yes               |                               |
| PSR07            | Business Control Analyst                  | PSR                | Professional Services     | Yes               |                               |
| PSR08            | Chief Executive Officer                   | PSR                | Professional Services     | Yes               |                               |
| PSR09            | Chief Financial Officer                   | PSR                | Professional Services     | Yes               |                               |
| PSR108           | CEO                                       | PSR08              | Chief Executive Officer   | Yes               |                               |
| PSR109           | CFO                                       | PSR09              | Chief Financial Officer   | Yes               |                               |
| PSR11            | Chairman of the Board                     | PSR                | Professional Services     | Yes               |                               |
| PSR111           | COB                                       | PSR11              | Chairman of the Board     | Yes               |                               |
| PSR112           | COO                                       | PSR12              | Chief Operations Officer  | Yes               |                               |
| PSR113           | CTO                                       | PSR13              | Chief Technical Officer   | Yes               |                               |
| PSR117           | CIO                                       | PSR17              | Chief Information Office  | Yes               |                               |
| PSR12            | Chief Operations Officer                  | PSR                | Professional Services     | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>        | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|--------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| PSR13            | Chief Technical Officer        | PSR                | Professional Services     | Yes               |                               |
| PSR14            | Business Team Leader           | PSR                | Professional Services     | Yes               |                               |
| PSR15            | Central Director               | PSR                | Professional Services     | Yes               |                               |
| PSR16            | Central Leader                 | PSR                | Professional Services     | Yes               |                               |
| PSR17            | Chief Information Office       | PSR                | Professional Services     | Yes               |                               |
| PSR18            | Chief of Staff                 | PSR                | Professional Services     | Yes               |                               |
| PSR19            | Civil Engineer                 | PSR                | Professional Services     | Yes               |                               |
| PSR20            | Communications                 | PSR                | Professional Services     | Yes               |                               |
| PSR21            | Compensation Analyst           | PSR                | Professional Services     | Yes               |                               |
| PSR22            | Counselor                      | PSR                | Professional Services     | Yes               |                               |
| PSR23            | Customer Liaison Specialist    | PSR                | Professional Services     | Yes               |                               |
| PSR24            | Customs Specialist             | PSR                | Professional Services     | Yes               |                               |
| PSR25            | Director                       | PSR                | Professional Services     | Yes               |                               |
| PSR26            | Division Leader                | PSR                | Professional Services     | Yes               |                               |
| PSR27            | Editor                         | PSR                | Professional Services     | Yes               |                               |
| PSR28            | Executive Chief of Staff       | PSR                | Professional Services     | Yes               |                               |
| PSR29            | Executive Advisor              | PSR                | Professional Services     | Yes               |                               |
| PSR30            | Executive Staff Director       | PSR                | Professional Services     | Yes               |                               |
| PSR31            | Facility Coordinator           | PSR                | Professional Services     | Yes               |                               |
| PSR32            | Facility Manager               | PSR                | Professional Services     | Yes               |                               |
| PSR33            | Facility Operations Manager    | PSR                | Professional Services     | Yes               |                               |
| PSR34            | Facility Operations Specialist | PSR                | Professional Services     | Yes               |                               |
| PSR35            | Group Leader                   | PSR                | Professional Services     | Yes               |                               |
| PSR36            | Human Resources Representative | PSR                | Professional Services     | Yes               |                               |
| PSR37            | Inspector                      | PSR                | Professional Services     | Yes               |                               |
| PSR38            | Intern                         | PSR                | Professional Services     | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>        | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|--------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| PSR39            | Investigator                   | PSR                | Professional Services     | Yes               |                               |
| PSR40            | Library Associate              | PSR                | Professional Services     | Yes               |                               |
| PSR41            | Operations Manager             | PSR                | Professional Services     | Yes               |                               |
| PSR42            | Operations Specialist          | PSR                | Professional Services     | Yes               |                               |
| PSR43            | Procedure Specialist           | PSR                | Professional Services     | Yes               |                               |
| PSR44            | Program Administrator          | PSR                | Professional Services     | Yes               |                               |
| PSR45            | Production Control Specialist  | PSR                | Professional Services     | Yes               |                               |
| PSR46            | Program Assistant              | PSR                | Professional Services     | Yes               |                               |
| PSR47            | Program Director               | PSR                | Professional Services     | Yes               |                               |
| PSR48            | Program Manager                | PSR                | Professional Services     | Yes               |                               |
| PSR49            | Program Team Leader            | PSR                | Professional Services     | Yes               |                               |
| PSR50            | Project Manager                | PSR                | Professional Services     | Yes               |                               |
| PSR51            | Property Management Specialist | PSR                | Professional Services     | Yes               |                               |
| PSR52            | Public Relations Specialist    | PSR                | Professional Services     | Yes               |                               |
| PSR53            | Quality Assurance Specialist   | PSR                | Professional Services     | Yes               |                               |
| PSR54            | Recruiter                      | PSR                | Professional Services     | Yes               |                               |
| PSR55            | Risk Assessment Specialist     | PSR                | Professional Services     | Yes               |                               |
| PSR56            | Security Program Leader        | PSR                | Professional Services     | Yes               |                               |
| PSR57            | Senior Executive Staff Advisor | PSR                | Professional Services     | Yes               |                               |
| PSR58            | Senior Investigator            | PSR                | Professional Services     | Yes               |                               |
| PSR59            | Senior Project Leader          | PSR                | Professional Services     | Yes               |                               |
| PSR60            | Staff Intern                   | PSR                | Professional Services     | Yes               |                               |
| PSR61            | Senior Staff Member            | PSR                | Professional Services     | Yes               |                               |
| PSR62            | Staff Research Assistant       | PSR                | Professional Services     | Yes               |                               |
| PSR63            | Team Leader                    | PSR                | Professional Services     | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>       | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| PSR64            | Training Specialist           | PSR                | Professional Services     | Yes               |                               |
| PSR65            | Training Team Leader          | PSR                | Professional Services     | Yes               |                               |
| PSR67            | Undergrad Administrative Aide | PSR                | Professional Services     | Yes               |                               |
| QCM              | QC Manager                    | INDS034            | Quality Control Manager   | Yes               |                               |
| Rfrs             | Roofers                       | INDS               | Industrial/Service        | Yes               |                               |
| SCI              | Science                       |                    |                           | Yes               |                               |
| SCI01            | Chemical Engineer             | SCI                | Science                   | Yes               |                               |
| SCI02            | Chemical Lab Technician       | SCI                | Science                   | Yes               |                               |
| SCI03            | Chief Science Officer         | SCI                | Science                   | Yes               |                               |
| SCI05            | Environmental Engineer        | SCI                | Science                   | Yes               |                               |
| SCI06            | Nuclear Materials Specialist  | SCI                | Science                   | Yes               |                               |
| SCI07            | QC Analytical Chemist         | SCI                | Science                   | Yes               |                               |
| SCI09            | Science Education Specialist  | SCI                | Science                   | Yes               |                               |
| SCI10            | Scientific Advisor            | SCI                | Science                   | Yes               |                               |
| SCI11            | Scientist                     | SCI                | Science                   | Yes               |                               |
| SMK              | Sales & Marketing             |                    |                           | Yes               |                               |
| SMK01            | Account Executive             | SMK                | Sales & Marketing         | Yes               |                               |
| SMK02            | Account Manager               | SMK                | Sales & Marketing         | Yes               |                               |
| SMK03            | Field Sales Representative    | SMK                | Sales & Marketing         | Yes               |                               |
| SMK04            | Marketing Assistant           | SMK                | Sales & Marketing         | Yes               |                               |
| SMK05            | Marketing Manager             | SMK                | Sales & Marketing         | Yes               |                               |
| SMK06            | Market Researcher             | SMK                | Sales & Marketing         | Yes               |                               |
| SMK07            | Recruitment Consultant        | SMK                | Sales & Marketing         | Yes               |                               |
| SMK08            | Sales Coordinator             | SMK                | Sales & Marketing         | Yes               |                               |
| SMK09            | Sales Assistant               | SMK                | Sales & Marketing         | Yes               |                               |
| SMK10            | Sales Associate               | SMK                | Sales & Marketing         | Yes               |                               |

[illegible]

[illegible]

## Job Priority

Priority allows you to separate jobs based on the urgency or importance of the job. For example, select “1” for top priority jobs.

Job Order &gt; Summary

[illegible]

## Languages

This list is used to track additional languages fluently spoken by a Candidate.

Candidate > Skills and Education

| Code Name | Code Description |
|-----------|------------------|
| ARAB      | Arabic           |
| ARME      | Armenian         |
| BULG      | Bulgarian        |
| CHIN      | Chinese          |
| CZEC      | Czechoslovakian  |
| DUTC      | Dutch            |
| EGYPT     | Egyptian         |
| ENGL      | English (UK)     |
| FINN      | Finnish          |
| FREN      | French           |
| GERM      | German           |
| GREE      | Greek            |
| HEBR      | Hebrew           |
| HIND      | Hindi (India)    |
| HUNG      | Hungarian        |
| ITAL      | Italian          |
| JAPA      | Japanese         |
| KORE      | Korean           |
| PAKI      | Pakistani        |
| POLI      | Polish           |
| PORT      | Portuguese       |
| ROMA      | Romanian         |
| RUSS      | Russian          |
| SPAN      | Spanish          |

[illegible]

## Metropolitan Areas

Used on multiple records, the Metro Area field can be used to define where a record is located in terms of an overall metro area (instead of just a city).

Candidate > Summary

Worksite > Summary

| Code Name | Code Description                     | Parent Name | Parent Description |
|-----------|--------------------------------------|-------------|--------------------|
| AK00      | Alaska                               |             |                    |
| AK01      | Anchorage                            | AK00        | Alaska             |
| AK02      | Fairbanks                            | AK00        | Alaska             |
| AK03      | Far North/Nome                       | AK00        | Alaska             |
| AK04      | Juneau                               | AK00        | Alaska             |
| AK05      | Southwest                            | AK00        | Alaska             |
| AL00      | Alabama                              |             |                    |
| AL01      | Anniston-Oxford                      | AL00        | Alabama            |
| AL02      | Birmingham-Hoover                    | AL00        | Alabama            |
| AL03      | Mobile                               | AL00        | Alabama            |
| AL04      | Montgomery                           | AL00        | Alabama            |
| AL05      | Huntsville                           | AL00        | Alabama            |
| AL06      | Tuscaloosa                           | AL00        | Alabama            |
| AL07      | Auburn-Opelika                       | AL00        | Alabama            |
| AL08      | Decatur (AL)                         | AL00        | Alabama            |
| AL09      | Dothan                               | AL00        | Alabama            |
| AL10      | Florence-Muscle Shoals               | AL00        | Alabama            |
| AL11      | Gadsden                              | AL00        | Alabama            |
| AR00      | Arkansas                             |             |                    |
| AR01      | Eastern                              | AR00        | Arkansas           |
| AR02      | Little Rock-North Little Rock-Conway | AR00        | Arkansas           |
| AR03      | Western                              | AR00        | Arkansas           |

| Code Name | Code Description                  | Parent Name | Parent Description |
|-----------|-----------------------------------|-------------|--------------------|
| AR04      | Fayetteville-Springdale-Rogers    | AR00        | Arkansas           |
| AR05      | Fort Smith                        | AR00        | Arkansas           |
| AR06      | Hot Springs                       | AR00        | Arkansas           |
| AR07      | Jonesboro                         | AR00        | Arkansas           |
| AR08      | Pine Bluff                        | AR00        | Arkansas           |
| AZ00      | Arizona                           |             |                    |
| AZ01      | Flagstaff                         | AZ00        | Arizona            |
| AZ02      | Phoenix-Mesa-Glendale             | AZ00        | Arizona            |
| AZ03      | Tucson                            | AZ00        | Arizona            |
| AZ04      | Yuma                              | AZ00        | Arizona            |
| AZ05      | Lake Havasu City-Kingman          | AZ00        | Arizona            |
| AZ06      | Prescott                          | AZ00        | Arizona            |
| CA00      | California                        |             |                    |
| CA01      | Anaheim / Huntington Beach        | CA00        | California         |
| CA02      | Central Coast                     | CA00        | California         |
| CA03      | Central Valley                    | CA00        | California         |
| CA04      | Chico / Eureka                    | CA00        | California         |
| CA05      | Los Angeles-Long Beach-Santa Ana  | CA00        | California         |
| CA06      | Los Angeles                       | CA00        | California         |
| CA07      | Marin County / North Bay          | CA00        | California         |
| CA08      | Oakland / Easy Bay                | CA00        | California         |
| CA09      | Orange County                     | CA00        | California         |
| CA10      | Riverside-San Bernardino-Ontario  | CA00        | California         |
| CA11      | Sacramento-Arden-Arcade-Roseville | CA00        | California         |
| CA12      | San Bernardino / Palm Springs     | CA00        | California         |
| CA13      | San Diego-Carlsbad-San Marcos     | CA00        | California         |
| CA14      | San Francisco-Oakland-Fremont     | CA00        | California         |
| CA15      | Santa Barbara-Santa Maria-Goleta  | CA00        | California         |

| Code Name | Code Description               | Parent Name | Parent Description |
|-----------|--------------------------------|-------------|--------------------|
| CA16      | Silicon Valley / Peninsula     | CA00        | California         |
| CA17      | Silicon Valley / San Jose      | CA00        | California         |
| CA18      | Oxnard-Thousand Oaks-Ventura   | CA00        | California         |
| CA19      | Bakersfield-Delano             | CA00        | California         |
| CA20      | El Centro                      | CA00        | California         |
| CA21      | Fresno                         | CA00        | California         |
| CA22      | Hanford-Corcoran               | CA00        | California         |
| CA23      | Medera-Chowchilla              | CA00        | California         |
| CA24      | Merced                         | CA00        | California         |
| CA25      | Modesto                        | CA00        | California         |
| CA26      | Napa                           | CA00        | California         |
| CA27      | Redding                        | CA00        | California         |
| CA28      | Salinas                        | CA00        | California         |
| CA29      | San Jose-Sunnyvale-Santa Clara | CA00        | California         |
| CA30      | San Luis Obispo                | CA00        | California         |
| CA31      | Santa Cruz-Watsonville         | CA00        | California         |
| CA32      | Santa Rosa-Petaluma            | CA00        | California         |
| CA33      | Stockton                       | CA00        | California         |
| CA34      | Vallejo-Fairfield              | CA00        | California         |
| CA35      | Visalia-Porterville            | CA00        | California         |
| CA36      | Yuba City                      | CA00        | California         |
| CO00      | Colorado                       |             |                    |
| CO01      | Boulder                        | CO00        | Colorado           |
| CO02      | Colorado Springs               | CO00        | Colorado           |
| CO03      | Denver-Aurora-Broomfield       | CO00        | Colorado           |
| CO04      | Denver South                   | CO00        | Colorado           |
| CO05      | Wester / Grand Junction        | CO00        | Colorado           |
| CO06      | Fort Collins-Loveland          | CO00        | Colorado           |

| Code Name | Code Description                     | Parent Name | Parent Description   |
|-----------|--------------------------------------|-------------|----------------------|
| CO07      | Grand Junction                       | CO00        | Colorado             |
| CO08      | Greeley                              | CO00        | Colorado             |
| CO09      | Pueblo                               | CO00        | Colorado             |
| CT00      | Connecticut                          |             |                      |
| CT01      | Danbury                              | CT00        | Connecticut          |
| CT02      | Hartford-West Hartford-East Hartford | CT00        | Connecticut          |
| CT03      | New Haven                            | CT00        | Connecticut          |
| CT04      | Norwich-New London                   | CT00        | Connecticut          |
| CT05      | Stanford                             | CT00        | Connecticut          |
| CT06      | Bridgeport-Stamford-Norwalk          | CT00        | Connecticut          |
| CT07      | Waterbury                            | CT00        | Connecticut          |
| DC00      | District of Columbia                 |             |                      |
| DC01      | Washington/Metro                     | DC00        | District of Columbia |
| DC02      | Washington-Arlington-Alexandria      | DC00        | District of Columbia |
| DE00      | Delaware                             |             |                      |
| DE01      | Dover                                | DE00        | Delaware             |
| DE02      | Wilmington                           | DE00        | Delaware             |
| FL00      | Florida                              |             |                      |
| FL01      | Deltona-Daytona Beach-Ormond Beach   | FL00        | Florida              |
| FL02      | Fort Lauderdale                      | FL00        | Florida              |
| FL03      | Cape Coral-Fort Myers                | FL00        | Florida              |
| FL04      | Gainesville/Jacksonville/Ocala       | FL00        | Florida              |
| FL05      | Palm Bay-Melbourne-Titusville        | FL00        | Florida              |
| FL06      | Miami-Fort Lauderdale-Pompano Beach  | FL00        | Florida              |
| FL07      | Orlando-Kissimmee-Sanford            | FL00        | Florida              |
| FL08      | Pensacola-Ferry Pass-Brent           | FL00        | Florida              |
| FL09      | North Port-Bradenton-Sarasota        | FL00        | Florida              |

| Code Name | Code Description                   | Parent Name | Parent Description |
|-----------|------------------------------------|-------------|--------------------|
| FL10      | St. Petersburg/Clearwater          | FL00        | Florida            |
| FL11      | Tallahassee                        | FL00        | Florida            |
| FL12      | Tampa-St Petersburg-Clearwater     | FL00        | Florida            |
| FL13      | West Palm Beach                    | FL00        | Florida            |
| FL14      | Beach                              | FL00        | Florida            |
| FL15      | Crestview-Fort Walton Beach-Destin | FL00        | Florida            |
| FL16      | Gainesville (FL)                   | FL00        | Florida            |
| FL17      | Jacksonville (FL)                  | FL00        | Florida            |
| FL18      | Lakeland-Winter Haven              | FL00        | Florida            |
| FL19      | Ocala                              | FL00        | Florida            |
| FL20      | Palm Coast                         | FL00        | Florida            |
| FL21      | Panama City-Lynn Haven             | FL00        | Florida            |
| FL22      | Port St Lucie                      | FL00        | Florida            |
| FL23      | Punta Gorda                        | FL00        | Florida            |
| FL24      | Sebastian-Vero Beach               | FL00        | Florida            |
| GA00      | Georgia                            |             |                    |
| GA01      | Atlanta-Sandy Springs-Marietta     | GA00        | Georgia            |
| GA02      | Atlanta - South                    | GA00        | Georgia            |
| GA03      | Warner Robins                      | GA00        | Georgia            |
| GA04      | Augusta-Richmond County            | GA00        | Georgia            |
| GA05      | Atlanta - Northeast                | GA00        | Georgia            |
| GA06      | Savannah                           | GA00        | Georgia            |
| GA07      | Atlanta - Southwest                | GA00        | Georgia            |
| GA08      | Albany (GA)                        | GA00        | Georgia            |
| GA09      | Athens-Clarke County               | GA00        | Georgia            |
| GA10      | Brunswick                          | GA00        | Georgia            |
| GA11      | Columbus (GA)                      | GA00        | Georgia            |
| GA12      | Dalton                             | GA00        | Georgia            |

| Code Name | Code Description              | Parent Name | Parent Description |
|-----------|-------------------------------|-------------|--------------------|
| GA13      | Gainesville (GA)              | GA00        | Georgia            |
| GA14      | Hinesville-Fort Stewart       | GA00        | Georgia            |
| GA15      | Macon                         | GA00        | Georgia            |
| GA16      | Rome                          | GA00        | Georgia            |
| GA17      | Valdosta                      | GA00        | Georgia            |
| HI00      | Hawaii                        |             |                    |
| HI01      | Honolulu                      | HI00        | Hawaii             |
| IA00      | Iowa                          |             |                    |
| IA01      | Cedar Rapids                  | IA00        | Iowa               |
| IA02      | Des Moines-Central Des Moines | IA00        | Iowa               |
| IA03      | Davenport                     | IA00        | Iowa               |
| IA04      | Dubuque                       | IA00        | Iowa               |
| IA05      | Sioux City                    | IA00        | Iowa               |
| IA06      | Des Moines-West Des Moines    | IA00        | Iowa               |
| IA07      | Ames                          | IA00        | Iowa               |
| IA08      | Iowa City                     | IA00        | Iowa               |
| IA09      | Waterloo-Cedar Falls          | IA00        | Iowa               |
| ID00      | Idaho                         |             |                    |
| ID01      | Boise City-Nampa              | ID00        | Idaho              |
| ID02      | Twin Falls                    | ID00        | Idaho              |
| ID03      | Northern                      | ID00        | Idaho              |
| ID04      | Coeur d'Alene                 | ID00        | Idaho              |
| ID05      | Idaho Falls                   | ID00        | Idaho              |
| ID06      | Lewiston                      | ID00        | Idaho              |
| ID07      | Pocatello                     | ID00        | Idaho              |
| IL00      | Illinois                      |             |                    |
| IL01      | Bloomington-Normal            | IL00        | Illinois           |
| IL02      | Chicago-Joliet-Naperville     | IL00        | Illinois           |

| Code Name | Code Description             | Parent Name | Parent Description |
|-----------|------------------------------|-------------|--------------------|
| IL03      | Chicago North                | IL00        | Illinois           |
| IL04      | Chicago Northwest            | IL00        | Illinois           |
| IL05      | Chicago South                | IL00        | Illinois           |
| IL06      | Chicago West                 | IL00        | Illinois           |
| IL07      | Quincy                       | IL00        | Illinois           |
| IL08      | Rockford                     | IL00        | Illinois           |
| IL09      | Southern                     | IL00        | Illinois           |
| IL10      | Springfield (IL)             | IL00        | Illinois           |
| IL11      | Champaign-Urbana             | IL00        | Illinois           |
| IL12      | Danville (IL)                | IL00        | Illinois           |
| IL13      | Davenport-Moline-Rock Island | IL00        | Illinois           |
| IL14      | Decatur (IL)                 | IL00        | Illinois           |
| IL15      | Kankakee-Bradley             | IL00        | Illinois           |
| IL16      | Peoria                       | IL00        | Illinois           |
| IN00      | Indiana                      |             |                    |
| IN01      | Evansville                   | IN00        | Indiana            |
| IN02      | Fort Wayne                   | IN00        | Indiana            |
| IN03      | Gary/Merrillville            | IN00        | Indiana            |
| IN04      | Indianapolis-Carmel          | IN00        | Indiana            |
| IN05      | Lafayette (IN)               | IN00        | Indiana            |
| IN06      | South Bend-Mishawaka         | IN00        | Indiana            |
| IN07      | Terra Haute                  | IN00        | Indiana            |
| IN08      | Anderson (IN)                | IN00        | Indiana            |
| IN09      | Bloomington (IN)             | IN00        | Indiana            |
| IN10      | Columbus (IN)                | IN00        | Indiana            |
| IN11      | Elkhart-Goshen               | IN00        | Indiana            |
| IN12      | Kokomo                       | IN00        | Indiana            |
| IN13      | Michigan City-La Porte       | IN00        | Indiana            |

| Code Name | Code Description            | Parent Name | Parent Description |
|-----------|-----------------------------|-------------|--------------------|
| IN14      | Muncie                      | IN00        | Indiana            |
| KS00      | Kansas                      |             |                    |
| KS01      | Kansas City                 | KS00        | Kansas             |
| KS02      | Overland Park               | KS00        | Kansas             |
| KS03      | Topeka                      | KS00        | Kansas             |
| KS04      | Wichita                     | KS00        | Kansas             |
| KS05      | Lawrence                    | KS00        | Kansas             |
| KS06      | Manhattan                   | KS00        | Kansas             |
| KY00      | Kentucky                    |             |                    |
| KY01      | Bowling Green / Paducah     | KY00        | Kentucky           |
| KY02      | Lexington-Fayette           | KY00        | Kentucky           |
| KY03      | Louisville-Jefferson County | KY00        | Kentucky           |
| KY04      | Northern Kentucky           | KY00        | Kentucky           |
| KY05      | Elizabethtown               | KY00        | Kentucky           |
| KY06      | Owensboro                   | KY00        | Kentucky           |
| LA00      | Louisiana                   |             |                    |
| LA01      | Alexandria                  | LA00        | Louisiana          |
| LA02      | Baton Rouge                 | LA00        | Louisiana          |
| LA03      | Lafayette (LA)              | LA00        | Louisiana          |
| LA04      | New Orleans-Metairie-Kenner | LA00        | Louisiana          |
| LA05      | Northern Louisiana          | LA00        | Louisiana          |
| LA06      | Houma-Bayon Cane-Thibodaux  | LA00        | Louisiana          |
| LA07      | Lake Charles                | LA00        | Louisiana          |
| LA08      | Monroe (LA)                 | LA00        | Louisiana          |
| LA09      | Shreveport-Bossier City     | LA00        | Louisiana          |
| MA00      | Massachusetts               |             |                    |
| MA01      | North Boston                | MA00        | Massachusetts      |
| MA02      | South Boston                | MA00        | Massachusetts      |

| Code Name | Code Description                  | Parent Name | Parent Description |
|-----------|-----------------------------------|-------------|--------------------|
| MA03      | Cape Cod / Islands                | MA00        | Massachusetts      |
| MA04      | Worcester / Framingham            | MA00        | Massachusetts      |
| MA05      | Barnstable Town                   | MA00        | Massachusetts      |
| MA06      | Springfield (MA)                  | MA00        | Massachusetts      |
| MA07      | Boston-Cambridge-Quincy           | MA00        | Massachusetts      |
| MA08      | Leominster-Fitchburg-Gardner      | MA00        | Massachusetts      |
| MA09      | New Bedford                       | MA00        | Massachusetts      |
| MA10      | Pittsfield                        | MA00        | Massachusetts      |
| MD00      | Maryland                          |             |                    |
| MD01      | Anne Arundel County               | MD00        | Maryland           |
| MD02      | Baltimore-Towson                  | MD00        | Maryland           |
| MD03      | Columbia                          | MD00        | Maryland           |
| MD04      | Frederick/Hagerstown              | MD00        | Maryland           |
| MD05      | Montgomery County                 | MD00        | Maryland           |
| MD06      | Prince Georges County             | MD00        | Maryland           |
| MD07      | Salisbury                         | MD00        | Maryland           |
| MD08      | Cumberland                        | MD00        | Maryland           |
| MD09      | Hagerstown-Martinsburg            | MD00        | Maryland           |
| ME        | Maine                             |             |                    |
| ME01      | Augusta                           | ME          | Maine              |
| ME02      | Bangor                            | ME          | Maine              |
| ME03      | Portland-South Portland-Biddeford | ME          | Maine              |
| ME04      | Lewiston-Auburn                   | ME          | Maine              |
| MI00      | Michigan                          |             |                    |
| MI01      | Ann Arbor                         | MI00        | Michigan           |
| MI02      | Detroit-Warren-Livonia            | MI00        | Michigan           |
| MI03      | Flint                             | MI00        | Michigan           |
| MI04      | Grand Rapids-Wyoming              | MI00        | Michigan           |

| Code Name | Code Description                | Parent Name | Parent Description |
|-----------|---------------------------------|-------------|--------------------|
| MI05      | Kalamazoo-Portage               | MI00        | Michigan           |
| MI06      | Lansing-East Lansing            | MI00        | Michigan           |
| MI07      | Battle Creek                    | MI00        | Michigan           |
| MI08      | Bay City                        | MI00        | Michigan           |
| MI09      | Holland-Grand Haven             | MI00        | Michigan           |
| MI10      | Jackson (MI)                    | MI00        | Michigan           |
| MI11      | Monroe (MI)                     | MI00        | Michigan           |
| MI12      | Muskegon-Norton Shores          | MI00        | Michigan           |
| MI13      | Niles-Benton Harbor             | MI00        | Michigan           |
| MI14      | Saginaw-Saginaw Township North  | MI00        | Michigan           |
| MN00      | Minnesota                       |             |                    |
| MN01      | Mankato-North Mankato           | MN00        | Minnesota          |
| MN02      | Minneapolis-St.Paul-Bloomington | MN00        | Minnesota          |
| MN03      | Duluth                          | MN00        | Minnesota          |
| MN04      | St. Paul                        | MN00        | Minnesota          |
| MN05      | Rochester (MN)                  | MN00        | Minnesota          |
| MN06      | St. Cloud                       | MN00        | Minnesota          |
| MO00      | Missouri                        |             |                    |
| MO01      | Jefferson City                  | MO00        | Missouri           |
| MO02      | Kansas City / Independence      | MO00        | Missouri           |
| MO03      | Quincy                          | MO00        | Missouri           |
| MO04      | Springfield (MO)                | MO00        | Missouri           |
| MO05      | St. Louis                       | MO00        | Missouri           |
| MO06      | Northeastern Missouri           | MO00        | Missouri           |
| MO07      | Southeastern Missouri           | MO00        | Missouri           |
| MO08      | Cape Girardeau-Jackson          | MO00        | Missouri           |
| MO09      | Columbia (MO)                   | MO00        | Missouri           |
| MO10      | Joplin                          | MO00        | Missouri           |

| Code Name | Code Description             | Parent Name | Parent Description |
|-----------|------------------------------|-------------|--------------------|
| MO11      | St. Joseph                   | MO00        | Missouri           |
| MS00      | Mississippi                  |             |                    |
| MS01      | Central Mississippi          | MS00        | Mississippi        |
| MS02      | Northern Mississippi         | MS00        | Mississippi        |
| MS03      | Southern Mississippi         | MS00        | Mississippi        |
| MS04      | Gulfport-Biloxi              | MS00        | Mississippi        |
| MS05      | Hattiesburg                  | MS00        | Mississippi        |
| MS06      | Jackson (MS)                 | MS00        | Mississippi        |
| MS07      | Pascagoula                   | MS00        | Mississippi        |
| MT00      | Montana                      |             |                    |
| MT01      | Billings                     | MT00        | Montana            |
| MT02      | Great Falls                  | MT00        | Montana            |
| MT03      | Helena/Butte                 | MT00        | Montana            |
| MT04      | Missoula                     | MT00        | Montana            |
| NC00      | North Carolina               |             |                    |
| NC01      | Charlotte-Gastonia-Rock Hill | NC00        | North Carolina     |
| NC02      | Greenville (NC)              | NC00        | North Carolina     |
| NC03      | Greensboro                   | NC00        | North Carolina     |
| NC04      | Raleigh / Durham             | NC00        | North Carolina     |
| NC05      | Asheville                    | NC00        | North Carolina     |
| NC06      | Wilmington                   | NC00        | North Carolina     |
| NC07      | Winston-Salem                | NC00        | North Carolina     |
| NC08      | Burlington                   | NC00        | North Carolina     |
| NC09      | Durham-Chapel Hill           | NC00        | North Carolina     |
| NC10      | Fayetteville                 | NC00        | North Carolina     |
| NC11      | Goldsboro                    | NC00        | North Carolina     |
| NC12      | Greensboro-High Point        | NC00        | North Carolina     |
| NC13      | Hickory-Lenoir-Morgantown    | NC00        | North Carolina     |

| Code Name | Code Description             | Parent Name | Parent Description |
|-----------|------------------------------|-------------|--------------------|
| NC14      | Jacksonville (NC)            | NC00        | North Carolina     |
| NC15      | Raleigh-Cary                 | NC00        | North Carolina     |
| NC16      | Rocky Mount                  | NC00        | North Carolina     |
| ND00      | North Dakota                 |             |                    |
| ND01      | Central North Dakota         | ND00        | North Dakota       |
| ND02      | Eastern North Dakota         | ND00        | North Dakota       |
| ND03      | Western North Dakota         | ND00        | North Dakota       |
| ND04      | Bismark                      | ND00        | North Dakota       |
| ND05      | Fargo                        | ND00        | North Dakota       |
| ND06      | Grand Forks                  | ND00        | North Dakota       |
| NE00      | Nebraska                     |             |                    |
| NE01      | Lincoln                      | NE00        | Nebraska           |
| NE02      | Omaha-Council Bluffs         | NE00        | Nebraska           |
| NE03      | Central / West Nebraska      | NE00        | Nebraska           |
| NH00      | New Hampshire                |             |                    |
| NH01      | North New Hampshire          | NH00        | New Hampshire      |
| NH02      | South New Hampshire          | NH00        | New Hampshire      |
| NH03      | Manchester                   | NH00        | New Hampshire      |
| NH04      | Portsmouth                   | NH00        | New Hampshire      |
| NH05      | Rochester-Dover              | NH00        | New Hampshire      |
| NJ00      | New Jersey                   |             |                    |
| NJ01      | Central New Jersey           | NJ00        | New Jersey         |
| NJ02      | Northern New Jersey          | NJ00        | New Jersey         |
| NJ03      | Southern New Jersey          | NJ00        | New Jersey         |
| NJ04      | Atlantic City-Hammonton      | NJ00        | New Jersey         |
| NJ05      | Ocean City                   | NJ00        | New Jersey         |
| NJ06      | Trenton-Ewing                | NJ00        | New Jersey         |
| NJ07      | Vineland-Millville-Bridgeton | NJ00        | New Jersey         |

| Code Name | Code Description                         | Parent Name | Parent Description |
|-----------|------------------------------------------|-------------|--------------------|
| NM00      | New Mexico                               |             |                    |
| NM01      | Albuquerque                              | NM00        | New Mexico         |
| NM02      | Santa Fe                                 | NM00        | New Mexico         |
| NM03      | Farmington                               | NM00        | New Mexico         |
| NM04      | Las Cruces                               | NM00        | New Mexico         |
| NV00      | Nevada                                   |             |                    |
| NV01      | Las Vegas-Paradise                       | NV00        | Nevada             |
| NV02      | Reno-Sparks                              | NV00        | Nevada             |
| NV03      | Carson City                              | NV00        | Nevada             |
| NY00      | New York                                 |             |                    |
| NY01      | Albany-Schenectady-Troy                  | NY00        | New York           |
| NY02      | Binghamton                               | NY00        | New York           |
| NY03      | Buffalo-Niagra Falls                     | NY00        | New York           |
| NY04      | Long Island                              | NY00        | New York           |
| NY05      | New York City                            | NY00        | New York           |
| NY06      | Rochester (NY)                           | NY00        | New York           |
| NY07      | Northern New York                        | NY00        | New York           |
| NY08      | Syracuse                                 | NY00        | New York           |
| NY09      | Utica-Rome                               | NY00        | New York           |
| NY10      | Westchester                              | NY00        | New York           |
| NY11      | Elmira                                   | NY00        | New York           |
| NY12      | Glens Falls                              | NY00        | New York           |
| NY13      | Staten Island                            | NY00        | New York           |
| NY14      | Ithaca                                   | NY00        | New York           |
| NY15      | Kingston                                 | NY00        | New York           |
| NY16      | New York-Northern New Jersey-Long Island | NY00        | New York           |
| NY17      | Poughkeepsie-Newburgh-Middletown         | NY00        | New York           |
| OH00      | Ohio                                     |             |                    |

| Code Name | Code Description             | Parent Name | Parent Description |
|-----------|------------------------------|-------------|--------------------|
| OH01      | Akron                        | OH00        | Ohio               |
| OH02      | Cincinnati-Middletown        | OH00        | Ohio               |
| OH03      | Cleveland                    | OH00        | Ohio               |
| OH04      | Columbus / Zanesville        | OH00        | Ohio               |
| OH05      | Dayton                       | OH00        | Ohio               |
| OH06      | Middletown                   | OH00        | Ohio               |
| OH07      | Toledo                       | OH00        | Ohio               |
| OH08      | Youngstown-Warren-Boardman   | OH00        | Ohio               |
| OH09      | Canton-Massillon             | OH00        | Ohio               |
| OH10      | Cleveland-Elyria-Mentor      | OH00        | Ohio               |
| OH11      | Columbus (OH)                | OH00        | Ohio               |
| OH12      | Lima                         | OH00        | Ohio               |
| OH13      | Mansfield                    | OH00        | Ohio               |
| OH14      | Sandusky                     | OH00        | Ohio               |
| OH15      | Springfield (OH)             | OH00        | Ohio               |
| OH16      | Steubenville-Weirton         | OH00        | Ohio               |
| OK00      | Oklahoma                     |             |                    |
| OK01      | Oklahoma City                | OK00        | Oklahoma           |
| OK02      | Tulsa                        | OK00        | Oklahoma           |
| OK03      | Lawton                       | OK00        | Oklahoma           |
| OR00      | Oregon                       |             |                    |
| OR01      | Portland-Vancouver-Hillsboro | OR00        | Oregon             |
| OR02      | Salem                        | OR00        | Oregon             |
| OR03      | Central Oregon               | OR00        | Oregon             |
| OR04      | Southern Oregon              | OR00        | Oregon             |
| OR05      | Bend                         | OR00        | Oregon             |
| OR06      | Corvallis                    | OR00        | Oregon             |
| OR07      | Eugene-Springfield           | OR00        | Oregon             |

| Code Name | Code Description                       | Parent Name | Parent Description |
|-----------|----------------------------------------|-------------|--------------------|
| OR08      | Medford                                | OR00        | Oregon             |
| PA00      | Pennsylvania                           |             |                    |
| PA01      | Allentown-Bethlehem-Easton             | PA00        | Pennsylvania       |
| PA02      | Erie                                   | PA00        | Pennsylvania       |
| PA03      | Harrisburg-Carlisle                    | PA00        | Pennsylvania       |
| PA04      | Johnstown                              | PA00        | Pennsylvania       |
| PA05      | Philadelphia-Camden-Wilmington         | PA00        | Pennsylvania       |
| PA06      | Pittsburgh                             | PA00        | Pennsylvania       |
| PA07      | Reading                                | PA00        | Pennsylvania       |
| PA08      | State College                          | PA00        | Pennsylvania       |
| PA09      | Scranton-Wilkes-Barre                  | PA00        | Pennsylvania       |
| PA10      | York-Hanover                           | PA00        | Pennsylvania       |
| PA11      | Altoona                                | PA00        | Pennsylvania       |
| PA12      | Lancaster                              | PA00        | Pennsylvania       |
| PA13      | Lebanon                                | PA00        | Pennsylvania       |
| PA14      | Williamsport                           | PA00        | Pennsylvania       |
| PR00      | Puerto Rico                            |             |                    |
| PR01      | San Juan                               | PR00        | Puerto Rico        |
| RI00      | Rhode Island                           |             |                    |
| RI01      | Providence-Fall River-Warwick          | RI00        | Rhode Island       |
| SC00      | South Carolina                         |             |                    |
| SC01      | Columbia (SC)                          | SC00        | South Carolina     |
| SC02      | Florence                               | SC00        | South Carolina     |
| SC03      | Greenville-Mauldin-Easley              | SC00        | South Carolina     |
| SC04      | Charleston-Summerville                 | SC00        | South Carolina     |
| SC05      | Anderson (SCO)                         | SC00        | South Carolina     |
| SC06      | Charleston-North                       | SC00        | South Carolina     |
| SC07      | Myrtle Beach-North Myrtle Beach-Conway | SC00        | South Carolina     |

| Code Name | Code Description                | Parent Name | Parent Description |
|-----------|---------------------------------|-------------|--------------------|
| SC08      | Spartanburg                     | SC00        | South Carolina     |
| SC09      | Sumter                          | SC00        | South Carolina     |
| SD00      | South Dakota                    |             |                    |
| SD01      | Sioux Falls                     | SD00        | South Dakota       |
| SD02      | Rapid City                      | SD00        | South Dakota       |
| TN00      | Tennessee                       |             |                    |
| TN01      | Chattanooga                     | TN00        | Tennessee          |
| TN02      | Jackson (TN)                    | TN00        | Tennessee          |
| TN03      | Knoxville                       | TN00        | Tennessee          |
| TN04      | Memphis                         | TN00        | Tennessee          |
| TN05      | Nashville-Davidson-Murfreesboro | TN00        | Tennessee          |
| TN06      | Clarksville                     | TN00        | Tennessee          |
| TN07      | Cleveland                       | TN00        | Tennessee          |
| TN08      | Franklin                        | TN00        | Tennessee          |
| TN09      | Johnson City                    | TN00        | Tennessee          |
| TN10      | Kingsport-Bristol               | TN00        | Tennessee          |
| TN11      | Morristown                      | TN00        | Tennessee          |
| TX00      | Texas                           |             |                    |
| TX01      | Abilene                         | TX00        | Texas              |
| TX02      | Amarillo                        | TX00        | Texas              |
| TX03      | Austin-Round Rock-San Marcos    | TX00        | Texas              |
| TX04      | Dallas-Fort Worth-Arlington     | TX00        | Texas              |
| TX05      | Beaumont-Port Arthur            | TX00        | Texas              |
| TX06      | El Paso                         | TX00        | Texas              |
| TX07      | Fort Worth                      | TX00        | Texas              |
| TX08      | Houston-Sugar Land-Baytown      | TX00        | Texas              |
| TX09      | San Antonio-New Braunfels       | TX00        | Texas              |
| TX10      | Corpus Christi                  | TX00        | Texas              |

| Code Name | Code Description          | Parent Name | Parent Description |
|-----------|---------------------------|-------------|--------------------|
| TX11      | Waco                      | TX00        | Texas              |
| TX12      | Wichita Falls             | TX00        | Texas              |
| TX13      | Brownsville-Harlingen     | TX00        | Texas              |
| TX14      | College Station-Bryan     | TX00        | Texas              |
| TX15      | Killeen-Temple-Fort Hood  | TX00        | Texas              |
| TX16      | Laredo                    | TX00        | Texas              |
| TX17      | Longview (TX)             | TX00        | Texas              |
| TX18      | Lubbock                   | TX00        | Texas              |
| TX19      | McAllen-Edinburg-Mission  | TX00        | Texas              |
| TX20      | Midland                   | TX00        | Texas              |
| TX21      | Odessa                    | TX00        | Texas              |
| TX22      | San Angelo                | TX00        | Texas              |
| TX23      | Sherman-Denison           | TX00        | Texas              |
| TX24      | Texarkana                 | TX00        | Texas              |
| TX25      | Tyler                     | TX00        | Texas              |
| TX26      | Victoria                  | TX00        | Texas              |
| UT00      | Utah                      |             |                    |
| UT01      | Provo-Orem                | UT00        | Utah               |
| UT02      | Salt Lake City            | UT00        | Utah               |
| UT03      | St. George                | UT00        | Utah               |
| UT04      | Logan                     | UT00        | Utah               |
| UT05      | Ogden-Clearfield          | UT00        | Utah               |
| VA00      | Virginia                  |             |                    |
| VA01      | Alexandria                | VA00        | Virginia           |
| VA02      | Charlottesville           | VA00        | Virginia           |
| VA03      | Fairfax /Manassas/ Reston | VA00        | Virginia           |
| VA04      | McLean / Arlington        | VA00        | Virginia           |
| VA05      | Hampton Roads             | VA00        | Virginia           |

| Code Name | Code Description                    | Parent Name | Parent Description |
|-----------|-------------------------------------|-------------|--------------------|
| VA06      | Richmond                            | VA00        | Virginia           |
| VA07      | Roanoke                             | VA00        | Virginia           |
| VA08      | Vienna                              | VA00        | Virginia           |
| VA09      | Northern Virginia                   | VA00        | Virginia           |
| VA10      | Southwestern Virginia               | VA00        | Virginia           |
| VA11      | Blacksburg-Christiansburg-Radford   | VA00        | Virginia           |
| VA12      | Danville (VA)                       | VA00        | Virginia           |
| VA13      | Harrisonburg                        | VA00        | Virginia           |
| VA14      | Lynchburg                           | VA00        | Virginia           |
| VA15      | Winchester                          | VA00        | Virginia           |
| VA16      | Virginia Beach-Norfolk-Newport News | VA00        | Virginia           |
| VI00      | Virgin Islands                      |             |                    |
| VI01      | St. Croix                           | VI00        | Virgin Islands     |
| VI02      | St. John                            | VI00        | Virgin Islands     |
| VI03      | St. Thomas                          | VI00        | Virgin Islands     |
| VT00      | Vermont                             |             |                    |
| VT01      | Northern Vermont                    | VT00        | Vermont            |
| VT02      | Southern Vermont                    | VT00        | Vermont            |
| VT03      | Burlington-South Burlington         | VT00        | Vermont            |
| WA00      | Washington                          |             |                    |
| WA01      | Redmond                             | WA00        | Washington         |
| WA02      | Yakima                              | WA00        | Washington         |
| WA03      | Spokane                             | WA00        | Washington         |
| WA04      | Seattle-Tacoma-Bellevue             | WA00        | Washington         |
| WA05      | Olympia                             | WA00        | Washington         |
| WA06      | Bellingham                          | WA00        | Washington         |
| WA07      | Bremerton-Silverdale                | WA00        | Washington         |
| WA08      | Kennewick-Pasco-Richland            | WA00        | Washington         |

| Code Name | Code Description              | Parent Name | Parent Description |
|-----------|-------------------------------|-------------|--------------------|
| WA09      | Longview (WA)                 | WA00        | Washington         |
| WA10      | Mount Vernon-Anacortes        | WA00        | Washington         |
| WA11      | Wenatchee-East Wenatchee      | WA00        | Washington         |
| WI00      | Wisconsin                     |             |                    |
| WI01      | Eau Claire                    | WI00        | Wisconsin          |
| WI02      | Green Bay                     | WI00        | Wisconsin          |
| WI03      | Madison                       | WI00        | Wisconsin          |
| WI04      | Milwaukee-Waukesha-West Allis | WI00        | Wisconsin          |
| WI05      | Northern Wisconsin            | WI00        | Wisconsin          |
| WI06      | Appleton                      | WI00        | Wisconsin          |
| WI07      | Fond du Lac                   | WI00        | Wisconsin          |
| WI08      | Janesville                    | WI00        | Wisconsin          |
| WI09      | La Crosse                     | WI00        | Wisconsin          |
| WI10      | Oshkosh-Neenah                | WI00        | Wisconsin          |
| WI11      | Racine                        | WI00        | Wisconsin          |
| WI12      | Sheboygan                     | WI00        | Wisconsin          |
| WI13      | Wausau                        | WI00        | Wisconsin          |
| WV00      | West Virginia                 |             |                    |
| WV01      | Northern West Virginia        | WV00        | West Virginia      |
| WV02      | Southern West Virginia        | WV00        | West Virginia      |
| WV03      | Charleston                    | WV00        | West Virginia      |
| WV04      | Huntington-Ashland            | WV00        | West Virginia      |
| WV05      | Morgantown                    | WV00        | West Virginia      |
| WV06      | Parkersburg-Marietta-Vienna   | WV00        | West Virginia      |
| WV07      | Wheeling                      | WV00        | West Virginia      |
| WY00      | Wyoming                       |             |                    |
| WY01      | Casper                        | WY00        | Wyoming            |
| WY02      | Cheyenne                      | WY00        | Wyoming            |



## Occupational Code (Back Office Only)

Occupational Code is a method some tax authorities use to identify the employee for taxing purposes. Since it is used in various ways, the Code Group is delivered without any default codes. This allows you to use the Code Group for whatever purposes you need.

Candidates > Employee Financial > Payroll and Taxes > State Unemployment & SDI

[illegible]

## Onboarding Group

This list is used to categorize forms that are uploaded in the Onboarding area. For example, a Candidate's W-4 might be placed in the "Tax Forms" group.

My Adapt > Administration > Manage Onboarding

[illegible]

Probationary Code is a method some tax authorities use to identify the employee for taxing purposes. Since it is used in various ways, the Code Group is delivered without any default codes. This allows you to use the Code Group for whatever purposes you need.

[illegible]

This list is used to indicate the type of Contract that applies to a Project. The pre-delivered codes are types of government contracts.

[illegible]

## Project Type

Project Type allows you to track each project that is associated with a company by type of project. For example, you would select “IT” if you create a project that houses Information Technology job orders or opportunities.

## Companies > Projects

[illegible]

## Reason Assignment/Placement Ended

When ending an Assignment or Placement, this field is used to show the overall reason. For example, if a Candidate comes off an assignment as scheduled, you could use the value of “Contract Ended”.

Assignment > Assignment Activities > End Assignment

[illegible]

## Reason for Leaving Previous Employment

In a Previous Employment record, this list is used to show why the Candidate is no longer at the specified place of employment.

Candidate &gt; Candidate Activities &gt; Add Previous Employment

[illegible]

Reference Relationship

Reference Relationship allows you to define the relationship between the candidate and his/her reference.

Candidate > References

| Code Name | Code Description    |
|-----------|---------------------|
| F         | Friend              |
| I         | Indirect Supervisor |
| P         | Peer                |
| R         | Relative            |
| S         | Supervision         |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |
|           |                     |

## Candidate &gt; Candidate Activities &gt; Rehire

[illegible]

## Salutation Title

This code list tracks the salutation for candidates and contacts. For example, select “Dr” if the candidate or contact prefers to be addressed that way.

Candidate &gt; Summary

Contact &gt; Summary

[illegible]

## Security Clearance Agency

Clearance Agency provides a way to track a candidate's qualifications to work within certain government agencies.

Candidate &gt; Skills and Education

[illegible]

Some job opportunities require candidates to have a specific Security Level. For example, select “Sensitive” for Candidates who are qualified to work with sensitive information.

[illegible]

## Separation Reason

This list indicates the reason for separating with the employee.

Candidate &gt; Candidate Activities &gt; Separate

[illegible]

## Shifts

This list indicates the shift that must be worked by the Candidate on the Job Order.

Candidate &gt; Summary

[illegible]

## Skill

Skills are used to record not only what a Candidate is able to do, but also the requirements for a Job Order. For example, placing the development skill requirement of “Java” on an Order allows you to find Candidates that have the same matching skill.

By default, the Web Portal Description matches the Code Description and therefore, is not listed in the table below. However, you can change the Web Portal Description in Adapt, if needed.

Candidate > Skills and Education

Job Order > Summary

| Code Name | Code Description | Parent Name | Parent Description   | Web Portal | Web Portal Description |
|-----------|------------------|-------------|----------------------|------------|------------------------|
| ACR001    | Acrobat          | PRO004      | Adobe Acrobat        | Yes        |                        |
| BOO001    | Bookkeeping      | PRO009      | Book Keeping         | Yes        |                        |
| MA001     | MS Access        | PRO039      | Microsoft Access     | Yes        |                        |
| ME001     | MS Excel         | PRO040      | Microsoft Excel      | Yes        |                        |
| ME002     | Excel            | PRO040      | Microsoft Excel      | Yes        |                        |
| ME003     | Excel 2003       | PRO040      | Microsoft Excel      | Yes        |                        |
| ME004     | Excel 2007       | PRO040      | Microsoft Excel      | Yes        |                        |
| ML001     | Outlook 2003     | PRO044      | Microsoft Outlook    | Yes        |                        |
| ML002     | Outlook 2007     | PRO044      | Microsoft Outlook    | Yes        |                        |
| ML003     | Outlook 98       | PRO044      | Microsoft Outlook    | Yes        |                        |
| MO001     | MS Office        | PRO041      | Microsoft Office     | Yes        |                        |
| MO002     | Office           | PRO041      | Microsoft Office     | Yes        |                        |
| MO003     | Office XP        | PRO041      | Microsoft Office     | Yes        |                        |
| MO004     | Office 2003      | PRO041      | Microsoft Office     | Yes        |                        |
| MO005     | Office 2007      | PRO041      | Microsoft Office     | Yes        |                        |
| MP001     | MS PowerPoint    | PRO042      | Microsoft PowerPoint | Yes        |                        |
| MP002     | PowerPoint       | PRO042      | Microsoft PowerPoint | Yes        |                        |
| MP003     | PowerPoint 2003  | PRO042      | Microsoft PowerPoint | Yes        |                        |
| MP004     | PowerPoint 2007  | PRO042      | Microsoft PowerPoint | Yes        |                        |
| MSE001    | Exchange 2003    | TEC055      | Microsoft Exchange   | Yes        |                        |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| MSE002           | Exchange 2007           | TEC055             | Microsoft Exchange        | Yes               |                               |
| MSE003           | Exchange 5.5            | TEC055             | Microsoft Exchange        | Yes               |                               |
| MW001            | MS Word                 | PRO043             | Microsoft Word            | Yes               |                               |
| MW002            | Word                    | PRO043             | Microsoft Word            | Yes               |                               |
| MW003            | Word 2003               | PRO043             | Microsoft Word            | Yes               |                               |
| MW004            | Word 2007               | PRO043             | Microsoft Word            | Yes               |                               |
| MWV001           | Microsoft Vista         | TEC123             | Windows Vista             | Yes               |                               |
| MWV002           | MS Vista                | TEC123             | Windows Vista             | Yes               |                               |
| MWX001           | Microsoft XP            | TEC122             | Windows XP                | Yes               |                               |
| MWX002           | MS XP                   | TEC122             | Windows XP                | Yes               |                               |
| PRO001           | Accounting              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO002           | Accounts Payable        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO003           | Accounts Receivable     | ProSkill           | Professional Skill        | Yes               |                               |
| PRO004           | Adobe Acrobat           | ProSkill           | Professional Skill        | Yes               |                               |
| PRO005           | Advertising             | ProSkill           | Professional Skill        | Yes               |                               |
| PRO006           | Audit Typing            | ProSkill           | Professional Skill        | Yes               |                               |
| PRO007           | Auditing                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO008           | Banking                 | ProSkill           | Professional Skill        | Yes               |                               |
| PRO009           | Book Keeping            | ProSkill           | Professional Skill        | Yes               |                               |
| PRO011           | Claims Processing       | ProSkill           | Professional Skill        | Yes               |                               |
| PRO012           | Clerical                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO013           | Collections             | ProSkill           | Professional Skill        | Yes               |                               |
| PRO014           | Correspondence          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO015           | Counseling              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO016           | Credit Control          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO017           | Crystal Reports         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO018           | Customer Service        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO019           | Data Entry              | ProSkill           | Professional Skill        | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| PRO020           | Data Processing         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO021           | Design                  | ProSkill           | Professional Skill        | Yes               |                               |
| PRO022           | Desktop Publishing      | ProSkill           | Professional Skill        | Yes               |                               |
| PRO023           | Editing                 | ProSkill           | Professional Skill        | Yes               |                               |
| PRO025           | Filing                  | ProSkill           | Professional Skill        | Yes               |                               |
| PRO026           | FrontPage               | ProSkill           | Professional Skill        | Yes               |                               |
| PRO027           | Graphics                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO028           | Great Plains            | ProSkill           | Professional Skill        | Yes               |                               |
| PRO029           | Internet                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO030           | Interviewing            | ProSkill           | Professional Skill        | Yes               |                               |
| PRO031           | Inventory Clerk         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO032           | Invoicing               | ProSkill           | Professional Skill        | Yes               |                               |
| PRO033           | Journalism              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO035           | Loan Processing         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO036           | Management Experience   | ProSkill           | Professional Skill        | Yes               |                               |
| PRO037           | Medical Patient Care    | ProSkill           | Professional Skill        | Yes               |                               |
| PRO038           | Medical Terminology     | ProSkill           | Professional Skill        | Yes               |                               |
| PRO039           | Microsoft Access        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO040           | Microsoft Excel         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO041           | Microsoft Office        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO042           | Microsoft PowerPoint    | ProSkill           | Professional Skill        | Yes               |                               |
| PRO043           | Microsoft Word          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO044           | Microsoft Outlook       | ProSkill           | Professional Skill        | Yes               |                               |
| PRO045           | Pagemaker               | ProSkill           | Professional Skill        | Yes               |                               |
| PRO046           | Payroll Accounting      | ProSkill           | Professional Skill        | Yes               |                               |
| PRO047           | Payroll Clerk           | ProSkill           | Professional Skill        | Yes               |                               |
| PRO048           | Photoshop               | ProSkill           | Professional Skill        | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| PRO049           | Press Operations        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO052           | Printing                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO053           | Project Management      | ProSkill           | Professional Skill        | Yes               |                               |
| PRO054           | Promotional Writing     | ProSkill           | Professional Skill        | Yes               |                               |
| PRO055           | Public Speaking         | ProSkill           | Professional Skill        | Yes               |                               |
| PRO056           | Publicity               | ProSkill           | Professional Skill        | Yes               |                               |
| PRO059           | QuickBooks              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO060           | Quicken                 | ProSkill           | Professional Skill        | Yes               |                               |
| PRO061           | Real Estate             | ProSkill           | Professional Skill        | Yes               |                               |
| PRO062           | Reception               | ProSkill           | Professional Skill        | Yes               |                               |
| PRO063           | Retail Experience       | ProSkill           | Professional Skill        | Yes               |                               |
| PRO064           | Scheduling              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO065           | Security                | ProSkill           | Professional Skill        | Yes               |                               |
| PRO066           | Short Hand              | ProSkill           | Professional Skill        | Yes               |                               |
| PRO067           | Sign Language           | ProSkill           | Professional Skill        | Yes               |                               |
| PRO068           | Speech Writing          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO070           | Technical Writing       | ProSkill           | Professional Skill        | Yes               |                               |
| PRO071           | Telecommunications      | ProSkill           | Professional Skill        | Yes               |                               |
| PRO072           | Telemarketing           | ProSkill           | Professional Skill        | Yes               |                               |
| PRO074           | TeleResearch            | ProSkill           | Professional Skill        | Yes               |                               |
| PRO075           | Typing                  | ProSkill           | Professional Skill        | Yes               |                               |
| PRO076           | Typing 70+ WPM          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO077           | Typing 60-70 WPM        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO078           | Typing 50-60 WPM        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO079           | Typing 40-50 WPM        | ProSkill           | Professional Skill        | Yes               |                               |
| PRO080           | Typing up to 40 WPM     | ProSkill           | Professional Skill        | Yes               |                               |
| PRO082           | Word Operation          | ProSkill           | Professional Skill        | Yes               |                               |
| PRO083           | Word Perfect            | ProSkill           | Professional Skill        | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| ProSkill         | Professional Skills     |                    |                           | Yes               |                               |
| SER001           | Bartending              | Service            | Services                  | Yes               |                               |
| SER002           | Building Maintenance    | Service            | Services                  | Yes               |                               |
| SER003           | Cashiering              | Service            | Services                  | Yes               |                               |
| SER004           | Catering                | Service            | Services                  | Yes               |                               |
| SER005           | Cleaning                | Service            | Services                  | Yes               |                               |
| SER006           | Cooking                 | Service            | Services                  | Yes               |                               |
| SER007           | Driving                 | Service            | Services                  | Yes               |                               |
| SER008           | Electronic Repair       | Service            | Services                  | Yes               |                               |
| SER009           | Forklift                | Service            | Services                  | Yes               |                               |
| SER010           | Industrial Assembly     | Service            | Services                  | Yes               |                               |
| SER011           | Industrial Order        | Service            | Services                  | Yes               |                               |
| SER012           | Industrial Packer       | Service            | Services                  | Yes               |                               |
| SER013           | Janitorial              | Service            | Services                  | Yes               |                               |
| SER014           | Landscaping             | Service            | Services                  | Yes               |                               |
| SER015           | Mechanical Drafting     | Service            | Services                  | Yes               |                               |
| SER016           | Metal Fabrication       | Service            | Services                  | Yes               |                               |
| SER017           | Plumbing                | Service            | Services                  | Yes               |                               |
| SER019           | Shipping & Receiving    | Service            | Services                  | Yes               |                               |
| SER020           | Stock Control           | Service            | Services                  | Yes               |                               |
| SER021           | Teaching                | Service            | Services                  | Yes               |                               |
| SER022           | Textiles                | Service            | Services                  | Yes               |                               |
| SER023           | Warehouse               | Service            | Services                  | Yes               |                               |
| SER024           | Welding                 | Service            | Services                  | Yes               |                               |
| Service          | Services                |                    |                           | Yes               |                               |
| TCE017           | ATM                     | Technic            | Technical Skills          | Yes               |                               |
| TEC001           | .NET                    | Technic            | Technical Skills          | Yes               |                               |
| TEC0019          | C                       | Technic            | Technical Skills          | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| TEC006           | ACT                     | Technic            | Technical Skills          | Yes               |                               |
| TEC007           | Adapt                   | Technic            | Technical Skills          | Yes               |                               |
| TEC008           | ADIC                    | Technic            | Technical Skills          | Yes               |                               |
| TEC012           | Macintosh               | Technic            | Technical Skills          | Yes               |                               |
| TEC014           | ASIC                    | Technic            | Technical Skills          | Yes               |                               |
| TEC015           | ASP                     | Technic            | Technical Skills          | Yes               |                               |
| TEC018           | AutoCAD                 | Technic            | Technical Skills          | Yes               |                               |
| TEC020           | C#                      | Technic            | Technical Skills          | Yes               |                               |
| TEC021           | C++                     | Technic            | Technical Skills          | Yes               |                               |
| TEC023           | CAD                     | Technic            | Technical Skills          | Yes               |                               |
| TEC024           | CCDA                    | Technic            | Technical Skills          | Yes               |                               |
| TEC025           | CCDP                    | Technic            | Technical Skills          | Yes               |                               |
| TEC026           | Checkpoint Firewall     | Technic            | Technical Skills          | Yes               |                               |
| TEC027           | Cisco                   | Technic            | Technical Skills          | Yes               |                               |
| TEC029           | COBOL                   | Technic            | Technical Skills          | Yes               |                               |
| TEC030           | DataStage               | Technic            | Technical Skills          | Yes               |                               |
| TEC031           | COM                     | Technic            | Technical Skills          | Yes               |                               |
| TEC032           | DB2                     | Technic            | Technical Skills          | Yes               |                               |
| TEC034           | Desktop Publishing      | Technic            | Technical Skills          | Yes               |                               |
| TEC036           | ETL                     | Technic            | Technical Skills          | Yes               |                               |
| TEC037           | Dreamweaver             | Technic            | Technical Skills          | Yes               |                               |
| TEC038           | FoxPro                  | Technic            | Technical Skills          | Yes               |                               |
| TEC039           | FrontPage               | Technic            | Technical Skills          | Yes               |                               |
| TEC042           | J2EE                    | Technic            | Technical Skills          | Yes               |                               |
| TEC043           | J2ME                    | Technic            | Technical Skills          | Yes               |                               |
| TEC044           | Java                    | Technic            | Technical Skills          | Yes               |                               |
| TEC045           | JavaScript              | Technic            | Technical Skills          | Yes               |                               |
| TEC050           | LAN Administration      | Technic            | Technical Skills          | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| TEC051           | Linux                   | Technic            | Technical Skills          | Yes               |                               |
| TEC052           | Lotus 1-2-3             | Technic            | Technical Skills          | Yes               |                               |
| TEC053           | Lotus Notes             | Technic            | Technical Skills          | Yes               |                               |
| TEC054           | MySQL                   | Technic            | Technical Skills          | Yes               |                               |
| TEC055           | Microsoft Exchange      | Technic            | Technical Skills          | Yes               |                               |
| TEC056           | Networking              | Technic            | Technical Skills          | Yes               |                               |
| TEC058           | Novell                  | Technic            | Technical Skills          | Yes               |                               |
| TEC059           | NT Server 4.0           | Technic            | Technical Skills          | Yes               |                               |
| TEC061           | Oracle                  | Technic            | Technical Skills          | Yes               |                               |
| TEC063           | PageMaker               | Technic            | Technical Skills          | Yes               |                               |
| TEC065           | PBX                     | Technic            | Technical Skills          | Yes               |                               |
| TEC068           | PeopleSoft              | Technic            | Technical Skills          | Yes               |                               |
| TEC069           | Perl                    | Technic            | Technical Skills          | Yes               |                               |
| TEC070           | Photoshop               | Technic            | Technical Skills          | Yes               |                               |
| TEC071           | PHP                     | Technic            | Technical Skills          | Yes               |                               |
| TEC072           | PL/SQL                  | Technic            | Technical Skills          | Yes               |                               |
| TEC074           | Quark Express           | Technic            | Technical Skills          | Yes               |                               |
| TEC075           | Quattro Pro             | Technic            | Technical Skills          | Yes               |                               |
| TEC076           | Sage Accounting         | Technic            | Technical Skills          | Yes               |                               |
| TEC080           | SQL                     | Technic            | Technical Skills          | Yes               |                               |
| TEC081           | SQL Server              | Technic            | Technical Skills          | Yes               |                               |
| TEC083           | Sun iPlanet             | Technic            | Technical Skills          | Yes               |                               |
| TEC084           | Sun Solaris             | Technic            | Technical Skills          | Yes               |                               |
| TEC085           | Sybase                  | Technic            | Technical Skills          | Yes               |                               |
| TEC087           | System Administration   | Technic            | Technical Skills          | Yes               |                               |
| TEC088           | System Programming      | Technic            | Technical Skills          | Yes               |                               |
| TEC089           | TCP/IP                  | Technic            | Technical Skills          | Yes               |                               |
| TEC090           | Transact- SQL           | Technic            | Technical Skills          | Yes               |                               |

| <b>Code Name</b> | <b>Code Description</b>   | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|---------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| TEC092           | UDP                       | Technic            | Technical Skills          | Yes               |                               |
| TEC093           | Unified Change Management | Technic            | Technical Skills          | Yes               |                               |
| TEC094           | Unigraphics Drafting      | Technic            | Technical Skills          | Yes               |                               |
| TEC095           | Unix                      | Technic            | Technical Skills          | Yes               |                               |
| TEC096           | UnixWare                  | Technic            | Technical Skills          | Yes               |                               |
| TEC097           | VB.Net                    | Technic            | Technical Skills          | Yes               |                               |
| TEC098           | VBScript                  | Technic            | Technical Skills          | Yes               |                               |
| TEC099           | Verilog                   | Technic            | Technical Skills          | Yes               |                               |
| TEC104           | Visio                     | Technic            | Technical Skills          | Yes               |                               |
| TEC105           | Visual Basic              | Technic            | Technical Skills          | Yes               |                               |
| TEC106           | Visual J++                | Technic            | Technical Skills          | Yes               |                               |
| TEC107           | Visual SourceSafe         | Technic            | Technical Skills          | Yes               |                               |
| TEC108           | Visual Test               | Technic            | Technical Skills          | Yes               |                               |
| TEC109           | Vitria                    | Technic            | Technical Skills          | Yes               |                               |
| TEC110           | WAN                       | Technic            | Technical Skills          | Yes               |                               |
| TEC111           | WAP                       | Technic            | Technical Skills          | Yes               |                               |
| TEC112           | WAP Gateways WIFI         | Technic            | Technical Skills          | Yes               |                               |
| TEC113           | WatchGuard Firebox        | Technic            | Technical Skills          | Yes               |                               |
| TEC114           | Web Design                | Technic            | Technical Skills          | Yes               |                               |
| TEC115           | Web Development           | Technic            | Technical Skills          | Yes               |                               |
| TEC116           | Web Services              | Technic            | Technical Skills          | Yes               |                               |
| TEC117           | WebLogic                  | Technic            | Technical Skills          | Yes               |                               |
| TEC118           | Windows 2000 Server       | Technic            | Technical Skills          | Yes               |                               |
| TEC119           | Windows 2003 Server       | Technic            | Technical Skills          | Yes               |                               |
| TEC120           | Windows NT                | Technic            | Technical Skills          | Yes               |                               |
| TEC121           | WML                       | Technic            | Technical Skills          | Yes               |                               |
| TEC122           | Windows XP                | Technic            | Technical Skills          | Yes               |                               |

[illegible]

## Skill Proficiency

This list is used to further define a Candidate’s capabilities. For example, a Candidate may have an “Intermediate” proficiency with Microsoft Access, but an “Advanced” proficiency with Microsoft Excel.

Candidate &gt; Skills and Education

[illegible]

## Source

Source allows you to identify where or how the candidate, contact, company or job order was found.

Candidate > Summary

Contact > Summary

Company > Summary

Order > Summary

| Code Name | Code Description | Parent Name | Parent Description | Web Portal | Web Portal Description |
|-----------|------------------|-------------|--------------------|------------|------------------------|
| 3P        | 3rd Party        |             |                    |            |                        |
| AD        | Advertisement    |             |                    |            |                        |
| AI        | Airs             |             |                    |            |                        |
| BB        | Bulletin Board   |             |                    |            |                        |
| BBN       | Broadbean        |             |                    |            |                        |
| BL        | Contact Sourcing |             |                    |            |                        |
| CB        | CareerBuilder    |             |                    |            |                        |
| CC        | Cold Call        |             |                    |            |                        |
| DF        | Data Frenzy      |             |                    |            |                        |
| DI        | DICE             |             |                    |            |                        |
| DO        | Dodge            |             |                    |            |                        |
| HV        | Hoovers          |             |                    |            |                        |
| ID        | Internet DB      |             |                    |            |                        |
| IN        | Internet         |             |                    |            |                        |
| IND       | Indeed           |             |                    |            |                        |
| JB        | Job Board        |             |                    |            |                        |
| JF        | Job Fair         |             |                    |            |                        |
| JM        | JobMagic         |             |                    |            |                        |
| LI        | LinkedIn         |             |                    |            |                        |
| LN        | Local Newspaper  |             |                    |            |                        |
| MAG001    | Magazine         |             |                    |            |                        |
| MO        | Monster          |             |                    |            |                        |

| <b>Code Name</b> | <b>Code Description</b> | <b>Parent Name</b> | <b>Parent Description</b> | <b>Web Portal</b> | <b>Web Portal Description</b> |
|------------------|-------------------------|--------------------|---------------------------|-------------------|-------------------------------|
| MS               | Monster Search          |                    |                           |                   |                               |
| NA               | NACCB Website           |                    |                           |                   |                               |
| NEW              | Newspaper Ad            |                    |                           |                   |                               |
| NT               | Net-Temps               |                    |                           |                   |                               |
| OT               | Other                   |                    |                           |                   |                               |
| RA               | Radio Ad                |                    |                           |                   |                               |
| RE               | Referral                |                    |                           |                   |                               |
| RR               | Recruiter Referral      |                    |                           |                   |                               |
| RT               | Radio/TV                |                    |                           |                   |                               |
| SE               | Search Expo             |                    |                           |                   |                               |
| SG               | Sales Genie             |                    |                           |                   |                               |
| TL               | Tip/Lead                |                    |                           |                   |                               |
| TS               | Tradeshow               |                    |                           |                   |                               |
| TV               | TV Ad                   |                    |                           |                   |                               |
| UG               | User Group              |                    |                           |                   |                               |
| VMS              | VMS Site                |                    |                           |                   |                               |
| WE               | Website                 |                    |                           |                   |                               |
| WS               | WebSite                 |                    |                           |                   |                               |
| YH               | Yahoo! HotJobs          |                    |                           |                   |                               |
| YP               | Yellow Pages            |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |
|                  |                         |                    |                           |                   |                               |

## Supplier Discipline

Adapt allows you to push Job Orders out to third party suppliers via the web portal. This list defines the type of job that each supplier is qualified to search for based on each of your clients. For example, select "IT" if the Suppliers to which the job will be released are qualified to search for IT positions.

Supplier &gt; Summary

Job Order &gt; Summary

[illegible]

## Test Level

When recording a Professional Test score, use this list to track the necessary levels (such as Basic, Intermediate and Advanced).

Candidate &gt; Skills and Education

[illegible]

## Test Names

This list includes the various types of professional tests taken by your candidates.

Candidate &gt; Skills and Education

[illegible]

## Topics for Companies

This list includes the options you can add to the Topic field when adding a Note for a Company record (Client, Supplier, Lead, Prospect).

Companies > General Activities > Add a Note

| Code Name | Code Description           | Parent Name | Parent Description |
|-----------|----------------------------|-------------|--------------------|
| ACAP      | Accounts Payable Profile   | AP          | Accounting         |
| ACCR      | Credit References          | AP          | Accounting         |
| ACIP      | Invoice Approval Process   | AP          | Accounting         |
| AP        | Accounting                 |             |                    |
| B         | Benefits                   |             |                    |
| ER        | Equipment Required         | SI          | Safety Information |
| EV        | Environment                |             |                    |
| EVDR      | Directions                 | EV          | Environment        |
| EVFA      | Facilities                 | EV          | Environment        |
| EVPK      | Parking                    | EV          | Environment        |
| EVSE      | Security                   | EV          | Environment        |
| EVSI      | Special Instructions       | EV          | Environment        |
| HI        | Health Insurance           | B           | Benefits           |
| RP        | Retirement Plans           | B           | Benefits           |
| SAL       | Sales                      |             |                    |
| SALAP     | Business Appreciation Card | SAL         | Sales              |
| SALCA     | Logo Company Calendar      | SAL         | Sales              |
| SALCC     | Logo Coffee Cup            | SAL         | Sales              |
| SALIB     | Introductory Brochure      | SAL         | Sales              |
| SALMP     | Logo Mouse Pad             | SAL         | Sales              |
| SALNC     | New Customer Card          | SAL         | Sales              |
| SALRQ     | Rates Quoted               | SAL         | Sales              |
| SALVP     | Logo Vacation Planner      | SAL         | Sales              |

[illegible]

## Topics for People

This list includes the options you can add to the Topic field when adding a Note for a People record (Candidate, Contact, Supplier Candidate, Supplier Contact).

People > General Activities > Add a Note

[illegible]

## UDF Candidate Code x

UDF Candidate Code 1-5 allows you to enter choices that will be available on the Candidate User Defined Field *UDF Candidate Code x*. There are 5 UDF Candidate Code lists, one for each of the UDF Candidate Code x fields located on the Candidate record. This field represents a single-select code field. If you want to set up a UDF Code list that allows for multiple code selection, see the UDF Candidate Mult Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 5, depending on which list you are viewing.

Candidate &gt; User Defined Fields &gt; UDF Candidate Code x

[illegible]

UDF Candidate Multi Code x

UDF Candidate Multi Code 1-2 allows you to enter choices that will be available on the Candidate User Defined Field *UDF Candidate Multi Code x*. There are 2 UDF Candidate Multi Code lists, one for each of the UDF Candidate Multi Code x fields located on the Candidate record. This field represents a multi-select code field. If you want to set up a UDF Code list that allows for single code selection, see the UDF Candidate Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 2, depending on which list you are viewing.

Candidate > User Defined Fields > UDF Candidate Multi Code x

| Code Name | Code Description     | Parent Name | Parent Description |
|-----------|----------------------|-------------|--------------------|
| MUDFx     | Candidate Multi-UDFx |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |
|           |                      |             |                    |

## UDF Client Code x

UDF Client Code 1-5 allows you to enter choices that will be available on the Client User Defined Field *UDF Client Code x*. There are 5 UDF Client Code lists, one for each of the UDF Client Code x fields located on the Client record. This field represents a single-select code field. If you want to set up a UDF Code list that allows for multiple code selection, see the UDF Client Mult Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 5, depending on which list you are viewing.

Client > User Defined Fields > UDF Client Code x

[illegible]

## UDF Client Multi Code x

UDF Client Multi Code 1-2 allows you to enter choices that will be available on the Client User Defined Field *UDF Client Multi Code x*. There are 2 UDF Client Multi Code lists, one for each of the UDF Client Multi Code x fields located on the Client record. This field represents a multi-select code field. If you want to set up a UDF Code list that allows for single code selection, see the UDF Client Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 2, depending on which list you are viewing.

Client > User Defined Fields > UDF Client Multi Code x

[illegible]

## UDF Job Order Code x

UDF Job Order Code 1-5 allows you to enter choices that will be available on the Job Order User Defined Field *UDF Job Order Code x*. There are 5 UDF Job Order Code lists, one for each of the UDF Job Order Code x fields located on the Job Order record. This field represents a single-select code field. If you want to set up a UDF Code list that allows for multiple code selection, see the UDF Job Order Mult Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 5, depending on which list you are viewing.

Job Orders > User Defined Fields > UDF Job Order Code x

[illegible]

## UDF Job Order Multi Code x

UDF Job Order Multi Code 1-2 allows you to enter choices that will be available on the Job Order User Defined Field *UDF Job Order Multi Code x*. There are 2 UDF Job Order Multi Code lists, one for each of the UDF Job Order Multi Code x fields located on the Job Order record. This field represents a multi-select code field. If you want to set up a UDF Code list that allows for single code selection, see the UDF Job Order Code list.

NOTE: In the following table (and above), the letter “x” stands for the number 1 thru 2, depending on which list you are viewing.

Job Orders > User Defined Fields > UDF Job Order Multi Code x

[illegible]

## Visa Type

If a Candidate is in the country on a Visa, use this list to indicate the type as defined by the government.

Candidate &gt; Personal Information

[illegible]

## VMS Req Reactivate Reason

This list contains the options that are available to explain why a VMS Requisition was reactivated.

adapt.studio > My Studios > VMS Requisitions

[illegible]

## VMS Req Reject Reason

This list contains the options that are available to explain why a VMS Requisition was rejected.

adapt.studio > My Studios > VMS Requisitions

[illegible]

## WC Claim Status

This list contains the options that are available to select a Workers Compensation Claim status.

Candidate &gt; Candidate Activities &gt; Add WC Claim

adapt.studio > My Studios > Workers Comp Claims

[illegible]

## WC Duty Status

This list contains the options that are available to select a Workers Modified Duty status.

Candidate > Candidate Activities > Add WC Claim

adapt.studio > My Studios > Workers Comp Claims

[illegible]

## WC Claim Category

This list contains the options that are available to select as a reason for claiming Workers Compensation. Since there might be various reasons, the Code Group is delivered without any default codes. This allows you to use the Code Group as per your need.

Candidate > Candidate Activities > Add WC Claim

adapt.studio > My Studios > Workers Comp Claims

[illegible]

## WC Topic

This list contains the options that are available to select as a Workers Compensation claim activity topic. Since there might be various topics, the Code Group is delivered without any default codes. This allows you to use the Code Group as per your need.

adapt.studio > My Studios > Workers Comp Claims

[illegible]

## WC Outcome

This list contains the options that are available to select as a Workers Compensation activity outcome. Since there might be various outcomes, the Code Group is delivered without any default codes. This allows you to use the Code Group as per your need.

adapt.studio > My Studios > Workers Comp Claims

[illegible]

## UE Claim Status

This list contains the options that are available to select a Unemployment Claim status.

Candidate &gt; Candidate Activities &gt; Add UE Claim

adapt.studio > My Studios > UE Insurance Claims

[illegible]

## UE Determination

This list contains the options that are available to select an Unemployment Determination.

Candidate &gt; Candidate Activities &gt; Add UE Claim

adapt.studio > My Studios > UE Insurance Claims

[illegible]

## UE Topic

This list contains the options that are available to select as a Unemployment claim activity topic. Since there might be various topics, the Code Group is delivered without any default codes. This allows you to use the Code Group as per your need.

adapt.studio > My Studios > UE Insurance Claims

[illegible]

## UE Outcome

This list contains the options that are available to select as a Unemployment activity outcome. Since there might be various outcomes, the Code Group is delivered without any default codes. This allows you to use the Code Group as per your need.

adapt.studio > My Studios > UE Insurance Claims

[illegible]





# Security Profiles

**Security profiles** determine a user's access rights to various functionality in Adapt. You may create multiple security profiles with various permission combinations. Any specific profile can be assigned to none, one, some or all users. Each user must have at least one security profile.

Adapt is delivered with a set of pre-determined security profiles. These profiles can be used as they are delivered or can be used as a starting point to create other profiles. The system delivered security profiles are optional and do not have to be used.

The following are the system delivered security profiles included in Adapt:

- ✓ General Administration
- ✓ Staffing Front Office
- ✓ Financial Administration (Back Office license only)
- ✓ Staffing Front and Back Office (Back Office license only)

The security profiles determine whether the user can use functionality. It determines what the user can do. Branch security determines what record can be accessed (depending on branch ownership). Thus, it determines where the user can do it. Together, they allow you to determine what functionality the user can access and where it can be accessed.

# Permissions

The following table lists all permissions within Adapt along with a brief description. The initial columns describe the permission:

- ✓ **Cat:** The Category of the permission.
- ✓ **Permission:** The Name of the permission.
- ✓ **Description:** A brief description of the permission.

The final four columns represent the following system-delivered security profiles:

- ✓ **GA:** General Administration
- ✓ **SFO:** Staffing Front Office
- ✓ **FA:** Financial Administration
- ✓ **SFBO:** Staffing Front and Back Office

An X in one of the final 4 columns means that the permission is turned on, by default, when the security profile is delivered. An empty cell means that the permission is turned off, by default, when the security profile is delivered. An “NA” means that the permission is not part of that security profile.

| Cat                  | Permission                   | Description                                                                                 | GA | SFO | FA | SFBO |
|----------------------|------------------------------|---------------------------------------------------------------------------------------------|----|-----|----|------|
| Archive              | Delete People                | Allows user to Delete People.                                                               | X  |     | X  |      |
| Archive              | Delete Company               | Allows user to Delete Companies.                                                            | X  |     | X  |      |
| Archive              | Restore Deleted People       | Allows the user to restore selected deleted records.                                        | X  |     | X  |      |
| Archive              | Restore Deleted Company      | Allows the user to restore selected deleted records.                                        | X  |     | X  |      |
| Assignment Financial | Mass Update Pay/Bill Rates   | Allows the user to mass update assignment pay or bill rates                                 | X  |     | X  |      |
| Assignment Financial | Assignment Sales Tax         | Allows user to Read and Edit Sales Tax Information in a Staffing or Direct Hire Assignment. | NA | NA  | X  | X    |
| Assignment Financial | Manage Assignment Financials | Allows user to Edit Assignment Financial Information.                                       | NA | NA  | X  | X    |
| Batch                | Reset Batch Status           | Allows user to reset the batch.                                                             | NA | NA  | X  | X    |
| Batch                | Manage Batch                 | Allows user to Create, Read, Edit and Delete Batch.                                         | X  | X   | X  | X    |
| Candidate            | Hiring Requirement           | Update Hiring Requirement.                                                                  | X  |     | X  |      |

| Cat                      | Permission                        | Description                                                                              | GA | SFO | FA | SFBO |
|--------------------------|-----------------------------------|------------------------------------------------------------------------------------------|----|-----|----|------|
| Candidate                | Electronic Onboarding Request     | Allows the user to perform Electronic Onboarding request.                                | X  |     | X  |      |
| Company Financial        | Manage Company Financials         | Allows user to View, Add or Edit data in the Financial segment of the Company record.    | NA | NA  | X  | X    |
| Company Financial        | Company Sales Tax                 | Allows user to Read and Edit Sales Tax Information on a Client.                          | NA | NA  | X  | X    |
| EEOC                     | Update Employee Confidential      | Allows user to view and update SSN and EEOC information on an Employee.                  | X  | X   | X  | X    |
| Employee Financial       | Manage Employee Deductions        | Allows user to Create, Read, Edit and Delete Employee Deductions in the Employee record. | NA | NA  | X  | X    |
| Employee Financial       | Manage Employee Direct Deposit    | Allows user to Create, Read, Edit and Delete Direct Deposit Information on an Employee.  | NA | NA  | X  | X    |
| Employee Financial       | Manage Payroll Taxes              | Allows user to View, Add and Edit payroll tax information within an Employee record.     | NA | NA  | X  | X    |
| File Retrieval           | Level 1 File Retrieval Permission | Allows user to retrieve file types that require Level 1 security                         | X  |     | X  |      |
| File Retrieval           | Level 2 File Retrieval Permission | Allows user to retrieve file types that require Level 1 security                         | X  |     | X  |      |
| File Retrieval           | Level 3 File Retrieval Permission | Allows user to retrieve file types that require Level 3 security                         | X  |     | X  |      |
| Financial Administration | Manage Billing                    | Allows user to process and update timecard and direct hire billing.                      | NA | NA  | X  |      |
| Financial Administration | Manage Payroll                    | Allows user to process and update checks and direct deposit advices.                     | NA | NA  | X  |      |
| Financial Administration | Manage Corporations               | Allows user to Create, Read, Edit and Delete Corporation.                                | NA | NA  | X  |      |
| Financial Administration | Manage Sales Tax                  | Allows user to Create, Read, Edit and Delete Sales Tax record.                           | NA | NA  | X  |      |
| Financial Administration | Manage Federal Levy               | Allows user to Create, Read and Edit Federal Levy.                                       | NA | NA  | X  |      |
| Financial Administration | Manage States                     | Allows user to Create, Read and Edit State Record.                                       | NA | NA  | X  |      |

| Cat                      | Permission                          | Description                                                                                                                   | GA | SFO | FA | SFBO |
|--------------------------|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|----|-----|----|------|
| Financial Administration | Manage Workers Comp Codes           | Allows user to Create, Read, Edit and View Workers Comp Codes and the Corporation, State and Branch attributes for the codes. | X  |     | X  |      |
| Financial Administration | Manage Bank Accounts                | Allows user to Create, Read, Edit and View Bank Accounts for a Corporation.                                                   | NA | NA  | X  |      |
| Financial Administration | Manage PayBill Codes                | Allows user to Create, Read, Edit and Delete PayBill Code.                                                                    | X  |     | X  |      |
| Financial Administration | Manage Deductions                   | Allows user to Create, Read, Edit, Copy Deductions in Administration.                                                         | NA | NA  | X  |      |
| Financial Administration | Employer Costing                    | Allows the user to initial or clear calculations for burden components for FICA, FUTA, SUI and Workers Comp.                  | NA | NA  | X  |      |
| Financial Administration | General Ledger Export               | Allows the user to launch the General Ledger Export process in order to generate the GL Export File.                          |    |     | X  |      |
| Financial Administration | Administer Fee                      | Allows user to override, revert and delete Fee                                                                                | X  | X   | X  | X    |
| Financial Administration | Manage Eligibility Programs         | Allows the user to Add, Edit or Recalculate Eligibility Programs                                                              | NA | NA  | X  |      |
| General Administration   | Manage Branches                     | Allows user to Create, Read, Edit and Delete Branch.                                                                          | X  |     | X  |      |
| General Administration   | Manage Regions                      | Allows user to Create, Read, Edit and Delete Region.                                                                          | X  |     | X  |      |
| General Administration   | Manage Users                        | Allows user to Create, Read, Edit and Delete User.                                                                            | X  |     | X  |      |
| General Administration   | Manage Security Profiles and Groups | Allows user to Read, Copy, Edit and Delete Security Profile.                                                                  | X  |     | X  |      |
| General Administration   | Manage Code List                    | Allows user to Add, Edit or Delete list items from a code group.                                                              | X  |     | X  |      |
| General Administration   | Manage Notifications                | Allows the user to manage notification email list.                                                                            | X  | X   | X  | X    |
| General Administration   | Front Office Administration         | Allows user to Set User Defined Defaults. Allows user to manage Candidate and Contact Web Logins.                             | X  | X   | X  | X    |

| Cat                    | Permission                      | Description                                                                                | GA | SFO | FA | SFBO |
|------------------------|---------------------------------|--------------------------------------------------------------------------------------------|----|-----|----|------|
| General Administration | Manage Onboarding               | Allows the user to perform all the administrative actions under Manage Onboarding.         | X  |     | X  |      |
| General Administration | Manage System Settings          | Allows user to access specific System Setting attributes.                                  | X  |     | X  |      |
| General Administration | Timecard Import                 | Allows user to import timecard using the timecard import studio.                           | X  | X   | X  | X    |
| General Administration | Manage ACA Activities           | Allows user to initiate ACA Healthcare Activities.                                         | X  | X   | X  | X    |
| General Administration | Manage ACA Administration       | Allows user to Manage the ACA Information and process ACA Updates in Administration.       | X  |     | X  |      |
| General Administration | Data Dictionary                 | Allows the user to launch Data Dictionary under the Administration General Settings.       | X  |     | X  |      |
| General Administration | Monster Data Import             | Allows the user to launch Monster Data Import.                                             | X  |     | X  |      |
| General Administration | Manage Data Mapping             | Allows the user to add and edit data mapping setup in the Manage Data Mapping area.        | X  |     | X  |      |
| General Administration | Manage Partner Integration      | Allows the user to perform all the administrative actions under Manage Partner Integration | X  |     | X  |      |
| General Administration | Change Ownership                | Allows the user to edit or add Recruiter and Account Manager                               | X  | X   | X  | X    |
| General Administration | Manage Compass Portal Options   | Allows the user to manage Compass Portal options                                           | X  |     | X  |      |
| General Administration | Level 1 Document Access         | Allows the user to access documents that require Level 1 security                          | X  | X   | X  | X    |
| General Administration | Level 2 Document Access         | Allows the user to access documents that require Level 2 security                          | X  |     | X  |      |
| General Administration | Level 3 Document Access         | Allows the user to access documents that require Level 3 security                          | X  |     | X  |      |
| Integrations           | Send External Background Checks | Allows user to send background checks to an external source.                               | X  | X   | X  | X    |

| Cat                  | Permission                  | Description                                                                                                  | GA | SFO | FA | SFBO |
|----------------------|-----------------------------|--------------------------------------------------------------------------------------------------------------|----|-----|----|------|
| Integrations         | Candidate Sourcing          | Allows user to search resumes from multiple job boards or public sites.                                      | X  | X   | X  | X    |
| Integrations         | VMS Administration          | Allows the user to manage VMS Settings.                                                                      | X  |     | X  |      |
| Integrations         | VMS Widget                  | Allows the user to manage VMS requisitions within the widget.                                                | X  | X   | X  | X    |
| Integrations         | Operational Export          | Allows user to launch operational exports via the batch menu (Export to Outlook, Send Mass Text, etc.).      | X  | X   | X  | X    |
| Integrations         | Financial Export            | Allows user to launch financial exports vis the batch menu (Change QB Export Status, Quickbooks, PAM Export) | X  | X   | X  | X    |
| Integrations         | Operational Import          | Allows user to launch operational imports singly or in batch (e.g. Broadlook Contract Capture).              | X  | X   | X  | X    |
| Integration          | External Job Posting        | Allows user to publish jobs to external sites.                                                               | X  | X   | X  | X    |
| Job Order Financials | Manage Job Order Financials | Allows user to Edit Job Order Financial information.                                                         | NA | NA  | X  | X    |
| Queue                | Manage Queue                | Allows user to View and Search Queue Processes.                                                              | X  | X   | X  | X    |
| Reports              | Manage KPIs                 | Allows the user to view and edit KPIs and run the KPI report for users with which they have branch access.   | X  |     | X  |      |
| Reports              | View My KPIs                | Allows the user to view their own KPIs and run the KPI report for their user.                                | X  | X   | X  | X    |
| Reports              | General Reports             | Allows the user to run reports in the General Reports Category.                                              | X  | X   | X  | X    |
| Reports              | General Report Export       | Allows the user to run and export reports in the General Reports Category.                                   | X  | X   | X  | X    |
| Reports              | Recruiter Reports           | Allows the user to run reports in the Recruiter Reports Category.                                            | X  | X   | X  | X    |
| Reports              | Recruiter Reports Export    | Allows the user to run and export reports in Recruiter Reports Category.                                     | X  | X   | X  | X    |

| <b>Cat</b> | <b>Permission</b>           | <b>Description</b>                                                              | <b>GA</b> | <b>SFO</b> | <b>FA</b> | <b>SFBO</b> |
|------------|-----------------------------|---------------------------------------------------------------------------------|-----------|------------|-----------|-------------|
| Reports    | Sales Reports               | Allows the user to run reports in the Sales Reports Category.                   | X         | X          | X         | X           |
| Reports    | Sales Reports Export        | Allows the user to run and export reports in Sales Reports Category.            | X         | X          | X         | X           |
| Reports    | Management Reports          | Allows the user to run reports in the Management Reports Category.              | X         | X          | X         | X           |
| Reports    | Management Reports Export   | Allows the user to run and export reports in Management Reports Category.       | X         | X          | X         | X           |
| Reports    | Export Custom Report        | Allows the user to export an custom report created from a search.               | X         | X          | X         | X           |
| Reports    | Timecard Reports            | Allows the user to run reports in the Timecard Reports Category.                | X         | X          | X         | X           |
| Reports    | Timecard Reports Export     | Allows the user to run and export reports in the Timecard Reports Category.     | X         | X          | X         | X           |
| Reports    | Batch Reports               | Allows the user to run reports in the Batch Reports Category                    | NA        | NA         | X         | X           |
| Reports    | Batch Reports Export        | Allows the user to run and export reports in the Batch Reports Category.        | NA        | NA         | X         | X           |
| Reports    | Payroll Reports             | Allows the user to run reports in the Payroll Reports Category.                 | NA        | NA         | X         | X           |
| Reports    | Payroll Reports Export      | Allows the user to run and export reports in the Payroll Reports Category.      | NA        | NA         | X         | X           |
| Reports    | Billing Reports             | Allows the user to run reports in the Billing Reports Category.                 | NA        | NA         | X         | X           |
| Reports    | Billing Reports Export      | Allows the user to run and export reports in the Billing Reports Category.      | NA        | NA         | X         | X           |
| Reports    | Government Reporting        | Allows the user to run reports in the Government Reporting Category.            | NA        | NA         | X         | X           |
| Reports    | Government Reporting Export | Allows the user to run and export reports in the Government Reporting Category. | NA        | NA         | X         | X           |

| <b>Cat</b> | <b>Permission</b>                       | <b>Description</b>                                                                          | <b>GA</b> | <b>SFO</b> | <b>FA</b> | <b>SFBO</b> |
|------------|-----------------------------------------|---------------------------------------------------------------------------------------------|-----------|------------|-----------|-------------|
| Reports    | General Administration Reports          | Allows the user to run reports in the General Administration Reports Category.              | X         |            | X         |             |
| Reports    | General Administration Reports Export   | Allows the user to run and export reports in the General Administration Reports Category.   | X         |            | X         |             |
| Reports    | Financial Administration Reports        | Allows the user to run reports in the Financial Administration Reports Category             | NA        | NA         | X         | X           |
| Reports    | Financial Administration Reports Export | Allows the user to run and export reports in the Financial Administration Reports Category. | NA        | NA         | X         | X           |
| Reports    | Manage Scheduler                        | Allows the user to manage the report Scheduler                                              | X         |            | X         |             |
| Reports    | Schedule Reports                        | Allows the user to schedule reports                                                         | X         |            | X         |             |
| Reports    | Level 1 Report Access                   | Allows the user to access Level 1 reports                                                   | X         |            | X         |             |
| Reports    | Level 2 Report Access                   | Allows the user to access Level 2 reports                                                   | X         |            | X         |             |
| Reports    | Level 3 Report Access                   | Allows the user to access Level 3 reports                                                   | X         |            | X         |             |
| Reports    | Report Administrator                    | Allows the user to add, edit, delete and copy reports.                                      | X         |            | X         |             |
| Staffing   | Studio Access                           | Allows users to access the studios in the system.                                           | X         | X          | X         | X           |
| Staffing   | Staffing Functions                      | All Front Office Staffing Functions not specifically defined by permissions.                | X         | X          | NA        | NA          |

# Permissions Grid

Use the following tables to determine the permissions for each user. Simply enter the user name (or initials) in the top row and then place an X in the cell below for each permission you want to give him/her.

| Adapt User Name                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|----------------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Archive                          |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Delete People                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Delete Company                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Restore Deleted People           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Restore Deleted Company          |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Assignment Financial Permissions |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Assignment Sales Tax             |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Assignment Financials     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Mass Update Pay/Bill Rates       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Batch Permissions                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Reset Batch Status               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Batch                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Candidate Permissions            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Hiring Requirement               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Electronic Onboarding Request    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Company Financial                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Company Financials        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Company Sales Tax                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EEOC Permissions                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Update Employee Confidential     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Employee Financial Permissions   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Employee Deductions       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

|                                      |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--------------------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| <b>Adapt User Name</b>               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Employee Direct Deposit       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Payroll Taxes                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| File Retrieval Permissions           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 1 File Retrieval Permission    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 2File Retrieval Permission     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 3File Retrieval Permission     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Administration Permissions |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Billing                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Payroll                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Corporations                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Sales Tax                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Federal Levy                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage States                        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Workers Comp Codes            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Eligibility Program           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Bank Accounts                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage PayBill Codes                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Deductions                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| General Ledger Export                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Administer Fee                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Employer Costing                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| General Administration Permissions   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Branches                      |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Regions                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Users                         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Security Profiles and Groups  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

|                                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|------------------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| <b>Adapt User Name</b>             |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Code List                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Notifications               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Front Office<br>Administration     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Onboarding                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage System Settings             |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Timecard Import                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage ACA Activities              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage ACA<br>Administration       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Data Dictionary                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Monster Data Import                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Data Mapping                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Partner<br>Integration      |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Change Ownership                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Integrations Permissions           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Send External Background<br>Checks |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| VMS Widgets                        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| VMS Administration                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Candidate Sourcing                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Operational Export                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Export                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| External Job Posting               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Operational Import                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Job Order Financial<br>Permissions |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Job Order<br>Financials     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Queue Permissions                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Queue                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Reports Permissions                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| General Reports                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

| <b>Adapt User Name</b>                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|-----------------------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| General Report Export                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage KPIs                             |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| View My KPIs                            |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Recruiter Reports                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Recruiter Reports Export                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Sales Reports                           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Sales Reports Export                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Management Reports                      |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Management Reports Export               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Export Ad hoc Report                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Timecard Reports                        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Timecard Reports Export                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Batch Reports                           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Batch Reports Export                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Payroll Reports                         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Payroll Reports Export                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Billing Reports                         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Billing Reports Export                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Government Reporting                    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Government Reporting Export             |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| General Administration Reports          |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| General Administration Reports Export   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Administration Reports        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Administration Reports Export |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manage Scheduler                        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Schedule Reports                        |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 1 Report Access                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 2 Report Access                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

|                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|-----------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Adapt User Name       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Level 3 Report Access |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Report Administrator  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Staffing Permissions  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Studio Access         |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Staffing Functions    |  |  |  |  |  |  |  |  |  |  |  |  |  |  |





# User Profiles

**User Profiles** contain information about each Adapt user such as name, user ID and password (used to log on to Adapt), assigned security profile, branch access, etc.

Each user profile is assigned a default branch and a default security profile. When a user creates a record in Adapt, it is automatically assigned to the default branch (although the user can change the assigned branch to any of which they have access). The default security profile is the one selected by the system when the user logs in, but can be changed to any security profile assigned to the user.

Each user must be assigned to at least one branch and one security profile, but they can be assigned to multiple branches and profiles.

The following table allows you to think through the various users you would like to add to Adapt. You can jot down User IDs and Passwords, as well as determine the default branch and security profile. You can also list other branches and profiles to which you would like to give them access. Other information not listed on the table which you will enter when you add a user is Email Address and Job Title.

| User Name | Initials | User ID | Password | Default Branch | Default Security Profile | Other Branches and Profiles |
|-----------|----------|---------|----------|----------------|--------------------------|-----------------------------|
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |
|           |          |         |          |                |                          |                             |

[illegible]





# Notifications

**Notifications** allow you to set up notification emails that are sent out when certain workflows are completed or when certain events occur. For example, you can have Adapt send a notification email whenever a new Job Order is created or an existing Job Order closed.

There are two different types of notifications: Internal and External. Internal Notifications are sent internally to users. External notifications are sent externally to Candidates.

You control the content of the email. You can add normal text and/or merge fields that pull in data directly from your database. Thus, instead of adding a Job Order Title directly into an email, you can set up the email to automatically pull in the Title.

You can have the email sent to the associated Account Manager or Recruiter, any User and/or any other email address. If the notification is associated with a branch, you can filter the notification to only send it to certain users.

Finally, you can either have Adapt send the email directly or send it to Outlook so you can preview it before it is sent. If you set up Notifications to do the latter, then you will need to send the email from Outlook after you have previewed it.

# Merge Fields

The following merge fields are available to use in the email body or subject line of the notification:

## Type: Job Order

| Merge Field          | Description                                   |
|----------------------|-----------------------------------------------|
| #JOB_ID#             | Job ID                                        |
| #JOB_TITLE#          | Job Title                                     |
| #JOB_CONTACT#        | Contact associated with the Job Order         |
| #JOB_AM#             | Account Manager associated with the Job Order |
| #JOB_RECRUITER#      | Recruiter associated with the Job Order       |
| #JobBillLow#         | Low bill rate on the Job Order                |
| #JobBillHigh#        | High bill rate on the Job Order               |
| #JobPayLow#          | Low pay rate on the Job Order                 |
| #JobPayHigh#         | High pay rate on the Job Order                |
| #JO_TYPE#            | Role on the Job Order                         |
| #JobSalaryLow#       | Low salary on the Job Order (Direct Job)      |
| #JobSalaryHigh#      | High salary on the Job Order (Direct Job)     |
| #Fee_Perc#           | Fee percentage                                |
| #Fee_Dollar#         | Fee dollar                                    |
| #Retainer_Perc#      | Retainer percentage                           |
| #Retainer_Dollar#    | Retainer dollar                               |
| #JobStatus#          | Status of the Job Order                       |
| #Job_Order_State#    | State of the Job Order                        |
| #Requestor#          | Requestor on the Job Order                    |
| #Category#           | Category on the Job Order                     |
| #JOB_DESCRIPTION#    | Job Description                               |
| #Reports_To#         | Reports To on the Job Order                   |
| #Start_Date#         | Start date on the Job Order                   |
| #Estimated_End_Date# | Estimated End Date on the Contract Job Order  |
| #AsgEstWeeks#        | Estimated weeks on the Contract Job Order     |
| #Required#           | Number required on the Job Order              |
| #Remaining#          | Number remaining on the Job Order             |
| #Worksite_Address_1# | First Address Line                            |

| Merge Field               | Description                              |
|---------------------------|------------------------------------------|
| #Worksite_Address_2#      | Second Address Line (Apts, Suites, etc.) |
| #Worksite_City#           | City of the Worksite                     |
| #Worksite_State/Province# | State/Province of the Worksite           |
| #Worksite_PostalCode#     | Postal Code on the Worksite              |

### Type: Company

| Merge Field        | Description                      |
|--------------------|----------------------------------|
| #CLIENT_NAME#      | Client company name              |
| #COMPANY_DIVISION# | Client division                  |
| #COMPANY_BRANCH#   | Client branch                    |
| #COMPANY_PHONE#    | Client company main phone number |

### Type: Assignment

| Merge Field                  | Description                                   |
|------------------------------|-----------------------------------------------|
| #ASSIG_ID#                   | Assignment ID                                 |
| #ASSIG_JOBTITLE#             | Job Title on the Assignment                   |
| #ASSIG_STARTDATE#            | Start Date on the Contract Assignment         |
| #ASSIG_ESTENDDATE#           | Estimated End Date on the Contract Assignment |
| #Assignment_Type#            | Assignment Role                               |
| #Assignment_Status#          | Status on the Assignment                      |
| #Account_Manager#            | Account Manager on the Assignment             |
| #Recruiter#                  | Recruiter on the Assignment                   |
| #Job_Title#                  | Title on the Assignment                       |
| #Job_Category#               | Category on the Assignment                    |
| #Assignment_Job_Description# | Description on the Assignment                 |
| #Assignment_Reports_To#      | Reports To on the Assignment                  |
| #Work_Hours_Start#           | Start of Work Hours on the Assignment         |
| #Work_Hours_End#             | End of Work Hours on the Assignment           |
| #Reason_Ended#               | Reason Assignment Ended                       |
| #AsgBillRate#                | Bill Rate on Contract Assignment              |
| #AsgPayRate#                 | Pay Rate on Contract Assignment               |
| #AsgEstWeeks#                | Estimated Weeks on Contract Assignment        |
| #AsgSalary#                  | Salary on Direct Assignment                   |

| Merge Field                      | Description                               |
|----------------------------------|-------------------------------------------|
| #AsgFullFee#                     | Full Fee on Direct Assignment             |
| #AsgDiscAmt#                     | Discount amount on Direct Assignment      |
| #AsgNetFee#                      | Net Fee on Direct Assignment              |
| #Assign_Worksite_Address_1#      | First Address Line                        |
| #Assign_Worksite_Address_2#      | Second Address Line (e.g. Apts, Suites)   |
| #Assign_Worksite_City#           | City on the Assignment Worksite           |
| #Assign_Worksite_State/Province# | State/Province on the Assignment Worksite |
| #Assign_Worksite_PostalCode#     | Postal Code on the Assignment Worksite    |

### Type: Assignment - Incident

| Merge Field               | Description                   |
|---------------------------|-------------------------------|
| #Incident_ID#             | ID of the Incident            |
| #Assignment_Person_Name#  | Person on the Incident        |
| #Assignment_Company_Name# | Company on the Incident       |
| #Assignment_Reported_By#  | Reported By on the Incident   |
| #Assignment_ID#           | Assignment ID on the Incident |
| #Incident_Type#           | Type of the Incident          |
| #Date_Of_Incident#        | Date on Incident              |
| #Reported_Date#           | Date Incident was Reported    |
| #Incident_Details#        | Details on the Incident       |

### Type: Candidate

| Merge Field                | Description                          |
|----------------------------|--------------------------------------|
| #CANDIDATE_FULLNAME#       | Candidate Full Name                  |
| #CANDIDATE_NICKNAME#       | Candidate Nickname                   |
| #PERSON_ID#                | Person ID                            |
| #CAND_ADDRESS_1#           | First line of Candidate Address      |
| #CAND_ADDRESS_2#           | Second line of Candidate Address     |
| #CAND_CITY#                | City of the Candidate                |
| #CAND_STATE#               | State of the Candidate               |
| #CAND_ZIP#                 | Zip (Postal) Code of the Candidate   |
| #CAND_STATUS#              | Status of the Candidate              |
| #CAND_AVAILABILITY_STATUS# | Availability Status of the Candidate |

| Merge Field                    | Description                                    |
|--------------------------------|------------------------------------------------|
| #CAND_AVAILABILITY_DATE#       | Availability Date of the Candidate             |
| #CAND_RECRUITER_NAME#          | Recruiter on the Candidate record              |
| #CANDIDATE_EMAIL#              | Email of the Candidate                         |
| #CAND_BRANCH#                  | Branch of the Candidate                        |
| #CAND_BRANCH_PHONE#            | Branch Phone Number of the Candidate           |
| #CAND_DIVISION#                | Division of the Candidate                      |
| #CAND_HOME_PHONE#              | Home Phone of the Candidate                    |
| #CAND_MOBILE#                  | Mobile Phone of the Candidate                  |
| #PAYROLL_TAX_REC_INPUT_BY#     | User who entered Payroll Tax Record            |
| #PAYROLL_TAX_REC_INPUT_DATE#   | Date Payroll Tax Record was entered            |
| #PAYROLL_TAX_REC_UPDATED_BY#   | User who updated Payroll Tax Record            |
| #PAYROLL_TAX_REC_UPDATED_DATE# | Date Payroll Tax Record was updated            |
| #PAYROLL_TAX_REC_CORP#         | Corporation associated with Payroll Tax Record |
| #FED_FILING_STATUS#            | Federal Filing Status on Payroll Tax Record    |
| #FED_ALLOWANCE#                | Federal Allowances on Payroll Tax Record       |
| #STATE_TAX_LOCATIONS#          | State Tax Location on Payroll Tax Record       |
| #STATE_FILING_STATUS#          | State Filing Status on Payroll Tax Record      |
| #STATE_ALLOWANCE#              | State Allowances on Payroll Tax Record         |
| #EMPLOYEE_TYPE#                | Type of Employee on Payroll Tax Record         |
| #WAGE_TYPE#                    | Wage Type on Payroll Tax Record                |
| #WAGE_FREQ#                    | Wage Frequency on Payroll Tax Record           |
| #CHECK_HANDLING#               | Check Handling on Payroll Tax Record           |
| #CAND_BRANCH_ADDRESS_1#        | Candidate Branch Address Line 1                |
| #CAND_BRANCH_ADDRESS_2#        | Candidate Branch Address Line 2                |
| #CAND_BRANCH_CITY#             | Candidate Branch City                          |
| #CAND_BRANCH_STATE#            | Candidate Branch State                         |
| #CAND_BRANCH_ZIP#              | Candidate Branch Postal Code                   |
| #CAND_UDF_CODE_1#              | UDF Candidate Code 1                           |
| #CAND_UDF_CODE_2#              | UDF Candidate Code 2                           |
| #CAND_UDF_CODE_3#              | UDF Candidate Code 3                           |
| #CAND_UDF_CODE_4#              | UDF Candidate Code 4                           |
| #CAND_UDF_CODE_5#              | UDF Candidate Code 5                           |

| Merge Field            | Description                                 |
|------------------------|---------------------------------------------|
| #CAND_UDF_MULTI_1#     | UDF Candidate Multi Code 1                  |
| #CAND_UDF_MULTI_2#     | UDF Candidate Multi Code 2                  |
| #CAND_UDF_URL_1#       | UDF Candidate URL 1                         |
| #CAND_UDF_URL_2#       | UDF Candidate URL 2                         |
| #CAND_UDF_NUM_1#       | UDF Candidate Numeric 1                     |
| #CAND_UDF_NUM_2#       | UDF Candidate Numeric 2                     |
| #CAND_UDF_DATE_1#      | UDF Candidate Date 1                        |
| #CAND_UDF_DATE_2#      | UDF Candidate Date 2                        |
| #CAND_UDF_DATE_3#      | UDF Candidate Date 3                        |
| #EMPLOYEE_CORPORATION# | Employee Corporation                        |
| #DD_DIST_TYPE#         | Direct Deposit Distribution Type            |
| #DD_BANK_NAME#         | Direct Deposit Bank Name                    |
| #DD_ACCT_TYPE#         | Direct Deposit Account Type                 |
| #DD_ALLOCATION#        | Direct Deposit Allocation                   |
| #DD_RESIDUAL#          | Direct Deposit Residual                     |
| #DD_ACTIVE#            | Direct Deposit Active Status                |
| #DD_CREATED_BY#        | User who created Direct Deposit record      |
| #DD_CREATED_DATE#      | Date Direct Deposit record created          |
| #DD_UPDATED_DATE#      | Date Direct Deposit record last updated     |
| #DD_UPDATED_DATE#      | User who last updated Direct Deposit record |

### Type: VMS Requisition

| Merge Field      | Description                               |
|------------------|-------------------------------------------|
| #TRUEREQ_ID#     | TrueReq ID on the VMS Requisition         |
| #VMS_NAME#       | VMS Name on the VMS Requisition           |
| #COMPANY_NAME#   | Company Name on the VMS Requisition       |
| #TRUEREQ_STATUS# | TrueReq Status on the VMS Requisition     |
| #VMS_STATUS#     | VMS Status on the VMS Requisition         |
| #CONTACT#        | Contact on the VMS Requisition            |
| #JOB_TYPE#       | Job Type on the VMS Requisition           |
| #VMS_JOB_TITLE#  | Job Title on the VMS Requisition          |
| #Openings#       | Number of Openings on the VMS Requisition |
| #START_DATE#     | Start Date on the VMS Requisition         |

| Merge Field         | Description                           |
|---------------------|---------------------------------------|
| #END_DATE#          | End Date on the VMS Requisition       |
| #VMS_BILLRATE_HIGH# | High Bill Rate on the VMS Requisition |
| #VMS_BILLRATE_LOW#  | Low Bill Rate on the VMS Requisition  |

### Type: Onboarding

| Merge Field       | Description                   |
|-------------------|-------------------------------|
| #OB_ITEM_DESC#    | Onboarding Item Description   |
| #OB_ITEM_DUEDATE# | Onboarding Item Due Date      |
| #OB_ITEM_DOCNAME# | Onboarding Item Document Name |

### Type: Workers Compensation Claim

| Merge Field             | Description                                |
|-------------------------|--------------------------------------------|
| #CLAIM_CAT#             | Claim Category                             |
| #DOC#                   | Date of Claim                              |
| #DOI#                   | Date of Injury                             |
| #CLAIM_STATUS#          | Claim Status                               |
| #CLAIMNO#               | Claim Number                               |
| #RESV_AMT#              | Reserve amount for the Claim               |
| #AMT_PAID#              | Amount Paid                                |
| #TOT_CLIM_CST#          | Total Claim Cost                           |
| #INJURYDETAILS#         | Details of Injury                          |
| #DUTY_STATUS#           | Modified Duty Status of the Injured Worker |
| #MODIFIED_DUTY_DETAILS# | Details of Modified Duty                   |

### Type: Unemployment Claim

| Merge Field    | Description                 |
|----------------|-----------------------------|
| #SEP_RESN#     | UE Separation Reason        |
| #SEP_DATE#     | UE Separation Date          |
| #RESP_DATE#    | UE Response Date            |
| #CLAIM_STATUS# | UE Claim Status             |
| #CLAIMNO#      | UE Claim Number             |
| #UE_FLAG#      | Candidate Unemployment Flag |
| #CLM_PER_FROM# | UE Claim Period From Date   |

| Merge Field        | Description             |
|--------------------|-------------------------|
| #CLM_PER_TO#       | UE Claim Period To Date |
| #RESPONSE_DETAILS# | UE Response Details     |

In order for the merge field to work correctly, it requires the preceding and following pound sign (#).

For example:

This is to notify you that #JOB\_CONTACT# has placed the following Job Order with us: #JOB\_TITLE#.

Note: If the merge field does not have any merge data, it displays as a blank space on the email. For example, if you select the #CANDIDATE\_FULLNAME# on an email generated when a Contract Job Order is created, the merge field will display as a blank space (since Candidates are associated with the Assignment and not the Job Order).

## 1st Report of Injury (Internal)

This notification email is sent when a Workers Compensation claim is created.

| Field                       | Selection            |
|-----------------------------|----------------------|
| Email Subject               | 1st Report of Injury |
| Active                      | Yes                  |
| Preview before Sending      |                      |
| Subscriber: Account Manager |                      |
| Subscriber: Recruiter       |                      |
| Users                       |                      |
| Additional Email Addresses  |                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## Auto Create Potential Duplicate Candidate from Broadbean (Internal)

---

This notification email is sent when the system auto creates a potential duplicate candidate from a Broadbean search.

| Field                       | Selection                                                        |
|-----------------------------|------------------------------------------------------------------|
| Email Subject               | Auto Create Potential Duplicate Candidate from Broadbean Search: |
| Active                      | Yes                                                              |
| Preview before Sending      |                                                                  |
| Subscriber: Account Manager |                                                                  |
| Subscriber: Recruiter       |                                                                  |
| Users                       |                                                                  |
| Additional Email Addresses  |                                                                  |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## Candidate Completed Onboarding Item on Portal (Internal)

---

This notification email is sent when the Candidate completes an onboarding item on the portal.

| Field                       | Selection                                     |
|-----------------------------|-----------------------------------------------|
| Email Subject               | Candidate Completed Onboarding Item on Portal |
| Active                      | Yes                                           |
| Preview before Sending      |                                               |
| Subscriber: Account Manager |                                               |
| Subscriber: Recruiter       |                                               |
| Users                       |                                               |
| Additional Email Addresses  |                                               |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## Candidate Declined to eSign Onboarding Item on Portal (Internal)

---

This notification email is sent when the Candidate declines to eSign an onboarding item on the portal.

| Field                       | Selection                                             |
|-----------------------------|-------------------------------------------------------|
| Email Subject               | Candidate Declined to eSign Onboarding Item on Portal |
| Active                      | Yes                                                   |
| Preview before Sending      |                                                       |
| Subscriber: Account Manager |                                                       |
| Subscriber: Recruiter       |                                                       |
| Users                       |                                                       |
| Additional Email Addresses  |                                                       |

Email Body

## Candidate Document Uploaded From Web (Internal)

This notification email is sent when the Candidate uploads a document from the Candidate Web Portal or Compass Portal.

| Field                       | Selection                            |
|-----------------------------|--------------------------------------|
| Email Subject               | Candidate Document Uploaded from Web |
| Active                      | Yes                                  |
| Preview before Sending      |                                      |
| Subscriber: Account Manager |                                      |
| Subscriber: Recruiter       |                                      |
| Users                       |                                      |
| Additional Email Addresses  |                                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Candidate Merged (Internal)

This notification email is sent when a Candidate Merge action is completed on a destination record.

| Field                       | Selection                 |
|-----------------------------|---------------------------|
| Email Subject               | Candidate has been Merged |
| Active                      | Yes                       |
| Preview before Sending      |                           |
| Subscriber: Account Manager |                           |
| Subscriber: Recruiter       |                           |
| Users                       |                           |
| Additional Email Addresses  |                           |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Candidate Unemployment Flag Updated (Internal)

This notification email is sent when Candidate Unemployment flag is changed.

| Field                       | Selection                           |
|-----------------------------|-------------------------------------|
| Email Subject               | Candidate Unemployment Flag Changed |
| Active                      | Yes                                 |
| Preview before Sending      |                                     |
| Subscriber: Account Manager |                                     |
| Subscriber: Recruiter       |                                     |
| Users                       |                                     |
| Additional Email Addresses  |                                     |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Change Contract Assignment Rates (Internal)

This notification email is sent when the pay and/or bill rates are changed on a contract assignment.

| Field                       | Selection                        |
|-----------------------------|----------------------------------|
| Email Subject               | Change Contract Assignment Rates |
| Active                      | Yes                              |
| Preview before Sending      |                                  |
| Subscriber: Account Manager |                                  |
| Subscriber: Recruiter       |                                  |
| Users                       |                                  |
| Additional Email Addresses  |                                  |

---

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## Change Contract Job Rates (Internal)

This notification email is sent when the pay and/or bill rates are changed on a contract job order.

| Field                       | Selection                 |
|-----------------------------|---------------------------|
| Email Subject               | Change Contract Job Rates |
| Active                      | Yes                       |
| Preview before Sending      |                           |
| Subscriber: Account Manager |                           |
| Subscriber: Recruiter       |                           |
| Users                       |                           |
| Additional Email Addresses  |                           |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Close Job Order (Internal)

This notification email is sent when a job order is closed.

| Field                       | Selection       |
|-----------------------------|-----------------|
| Email Subject               | Close Job Order |
| Active                      | Yes             |
| Preview before Sending      |                 |
| Subscriber: Account Manager |                 |
| Subscriber: Recruiter       |                 |
| Users                       |                 |
| Additional Email Addresses  |                 |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Compass Candidate Applied (Internal)

This notification email is sent when a candidate applies for a job via Compass.

| Field                       | Selection                                              |
|-----------------------------|--------------------------------------------------------|
| Email Subject               | Candidate applied for a job via Compass.               |
| Active                      | Yes                                                    |
| Preview before Sending      |                                                        |
| Subscriber: Account Manager |                                                        |
| Subscriber: Recruiter       | NOTE: This is the Recruiter from the Job Order record. |
| Users                       |                                                        |
| Additional Email Addresses  |                                                        |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Employee Direct Deposit Created, Updated or Deleted (Internal)

This notification email is sent when a direct deposit record is added, updated or deleted.

| Field                       | Selection                                            |
|-----------------------------|------------------------------------------------------|
| Email Subject               | Employee Direct Deposit Created, Updated or Deleted. |
| Active                      | Yes                                                  |
| Preview before Sending      |                                                      |
| Subscriber: Account Manager |                                                      |
| Subscriber: Recruiter       |                                                      |
| Users                       |                                                      |
| Additional Email Addresses  |                                                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## End Contract Assignment (Internal)

This notification email is sent when a contract assignment is ended.

| Field                       | Selection               |
|-----------------------------|-------------------------|
| Email Subject               | End Contract Assignment |
| Active                      | Yes                     |
| Preview before Sending      |                         |
| Subscriber: Account Manager |                         |
| Subscriber: Recruiter       |                         |
| Users                       |                         |
| Additional Email Addresses  |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## I9 Form - Section One of the I9 Form Complete (Internal)

This notification email is sent when I9 form section one completed by the Candidate.

| Field                       | Selection                                      |
|-----------------------------|------------------------------------------------|
| Email Subject               | I9 Form - Section One of the I9 form completed |
| Active                      | Yes                                            |
| Preview before Sending      |                                                |
| Subscriber: Account Manager |                                                |
| Subscriber: Recruiter       |                                                |
| Users                       |                                                |
| Additional Email Addresses  |                                                |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## LinkedIn CSA (Cross System Awareness) Bulk Linking Error (Internal)

This notification email is sent when an error is returned from: Candidate or Contact Creation or Overnight Process.

| Field                       | Selection                                                |
|-----------------------------|----------------------------------------------------------|
| Email Subject               | LinkedIn CSA (Cross System Awareness) Bulk Linking Error |
| Active                      | Yes                                                      |
| Preview before Sending      |                                                          |
| Subscriber: Account Manager |                                                          |
| Subscriber: Recruiter       |                                                          |
| Users                       |                                                          |
| Additional Email Addresses  |                                                          |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## LinkedIn Limited Listing Job Posting Failure (Internal)

This notification email is sent when a LinkedIn Limited Listing Job Posting fails.

| Field                       | Selection                                    |
|-----------------------------|----------------------------------------------|
| Email Subject               | LinkedIn Limited Listing Job Posting Failure |
| Active                      | Yes                                          |
| Preview before Sending      |                                              |
| Subscriber: Account Manager |                                              |
| Subscriber: Recruiter       |                                              |
| Users                       |                                              |
| Additional Email Addresses  |                                              |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## LinkedIn Seat Holder Retrieval Failure (Internal)

This notification email is sent when a LinkedIn Seat Holder Retrieval fails.

| Field                       | Selection                              |
|-----------------------------|----------------------------------------|
| Email Subject               | LinkedIn Seat Holder Retrieval Failure |
| Active                      | Yes                                    |
| Preview before Sending      |                                        |
| Subscriber: Account Manager |                                        |
| Subscriber: Recruiter       |                                        |
| Users                       |                                        |
| Additional Email Addresses  |                                        |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Assignment Incident (Internal)

This notification email is sent when an incident is created from the Assignment.

| Field                       | Selection               |
|-----------------------------|-------------------------|
| Email Subject               | New Assignment Incident |
| Active                      | Yes                     |
| Preview before Sending      |                         |
| Subscriber: Account Manager |                         |
| Subscriber: Recruiter       |                         |
| Users                       |                         |
| Additional Email Addresses  |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## New Contract Assignment (Internal)

---

This notification email is sent when a candidate is assigned to a contract job order.

| Field                       | Selection               |
|-----------------------------|-------------------------|
| Email Subject               | New Contract Assignment |
| Active                      | Yes                     |
| Preview before Sending      |                         |
| Subscriber: Account Manager |                         |
| Subscriber: Recruiter       |                         |
| Users                       |                         |
| Additional Email Addresses  |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Contract Job from Web (Internal)

This notification email is sent when a new contract job is created via web services.

| Field                       | Selection                 |
|-----------------------------|---------------------------|
| Email Subject               | New Contract Job from Web |
| Active                      | Yes                       |
| Preview before Sending      |                           |
| Subscriber: Account Manager |                           |
| Subscriber: Recruiter       |                           |
| Users                       |                           |
| Additional Email Addresses  |                           |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Contract Job Order (Internal)

This notification email is sent when a new contract job order is created within Adapt.

| Field                       | Selection              |
|-----------------------------|------------------------|
| Email Subject               | New Contract Job Order |
| Active                      | Yes                    |
| Preview before Sending      |                        |
| Subscriber: Account Manager |                        |
| Subscriber: Recruiter       |                        |
| Users                       |                        |
| Additional Email Addresses  |                        |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Direct Job from Web (Internal)

This notification email is sent when a new Direct Job is created via web services.

| Field                       | Selection               |
|-----------------------------|-------------------------|
| Email Subject               | New Direct Job from Web |
| Active                      | Yes                     |
| Preview before Sending      |                         |
| Subscriber: Account Manager |                         |
| Subscriber: Recruiter       |                         |
| Users                       |                         |
| Additional Email Addresses  |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Direct Job Order (Internal)

This notification email is sent when a new direct job order is created within Adapt.

| Field                       | Selection            |
|-----------------------------|----------------------|
| Email Subject               | New Direct Job Order |
| Active                      | Yes                  |
| Preview before Sending      |                      |
| Subscriber: Account Manager |                      |
| Subscriber: Recruiter       |                      |
| Users                       |                      |
| Additional Email Addresses  |                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## New Direct Placement (Internal)

---

This notification email is sent when a candidate is placed on a direct job order.

| Field                       | Selection            |
|-----------------------------|----------------------|
| Email Subject               | New Direct Placement |
| Active                      | Yes                  |
| Preview before Sending      |                      |
| Subscriber: Account Manager |                      |
| Subscriber: Recruiter       |                      |
| Users                       |                      |
| Additional Email Addresses  |                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## New Web Portal Candidate (Internal)

---

This notification email is sent when the Candidate completes the application on the Candidate Web Portal or the Compass Portal.

| Field                       | Selection                |
|-----------------------------|--------------------------|
| Email Subject               | New Web Portal Candidate |
| Active                      | Yes                      |
| Preview before Sending      |                          |
| Subscriber: Account Manager |                          |
| Subscriber: Recruiter       |                          |
| Users                       |                          |
| Additional Email Addresses  |                          |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Payroll Tax Record Added or Updated (Internal)

This notification email is sent when a payroll tax record is added or updated under Employee Financial.

| Field                       | Selection                           |
|-----------------------------|-------------------------------------|
| Email Subject               | Payroll Tax Record Added or Updated |
| Active                      | Yes                                 |
| Preview before Sending      |                                     |
| Subscriber: Account Manager |                                     |
| Subscriber: Recruiter       |                                     |
| Users                       |                                     |
| Additional Email Addresses  |                                     |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Potential Duplicate from Broadbean Search (Internal)

This notification email is sent if the imported candidate from Broadbean is a potential duplicate.

| Field                       | Selection                                       |
|-----------------------------|-------------------------------------------------|
| Email Subject               | Candidate Sourcing from Broadbean; Import Date: |
| Active                      | Yes                                             |
| Preview before Sending      |                                                 |
| Subscriber: Account Manager |                                                 |
| Subscriber: Recruiter       |                                                 |
| Users                       |                                                 |
| Additional Email Addresses  |                                                 |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Reassign Candidate (Internal)

This notification email is sent when a candidate is re-assigned on a contract job order.

| Field                       | Selection          |
|-----------------------------|--------------------|
| Email Subject               | Reassign Candidate |
| Active                      | Yes                |
| Preview before Sending      |                    |
| Subscriber: Account Manager |                    |
| Subscriber: Recruiter       |                    |
| Users                       |                    |
| Additional Email Addresses  |                    |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## TempBuddy Failure Notification (Internal)

This notification email is sent when a failure occurs while sending a TempBuddy record to Adapt.

| Field                       | Selection                      |
|-----------------------------|--------------------------------|
| Email Subject               | TempBuddy Failure Notification |
| Active                      | Yes                            |
| Preview before Sending      |                                |
| Subscriber: Account Manager |                                |
| Subscriber: Recruiter       |                                |
| Users                       |                                |
| Additional Email Addresses  |                                |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Unemployment Claim Status Updated (Internal)

This notification email is sent when Unemployment Claim Status is changed.

| Field                       | Selection                         |
|-----------------------------|-----------------------------------|
| Email Subject               | Unemployment Claim Status Changed |
| Active                      | Yes                               |
| Preview before Sending      |                                   |
| Subscriber: Account Manager |                                   |
| Subscriber: Recruiter       |                                   |
| Users                       |                                   |
| Additional Email Addresses  |                                   |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## VMS: Automated Update to Converted VMS Req (Internal)

This notification email is sent when the system automatically updates the Adapt Job Order.

| Field                       | Selection                                                                                  |
|-----------------------------|--------------------------------------------------------------------------------------------|
| Email Subject               | Adapt Job Order ( #JOB_TITLE# - #JOB_ID# ) has automatically updated from VMS Requisition. |
| Active                      | Yes                                                                                        |
| Preview before Sending      |                                                                                            |
| Subscriber: Account Manager |                                                                                            |
| Subscriber: Recruiter       |                                                                                            |
| Users                       |                                                                                            |
| Additional Email Addresses  |                                                                                            |

|            |                                                                                                                                |
|------------|--------------------------------------------------------------------------------------------------------------------------------|
| Email Body | Adapt Job Order ( #JOB_TITLE# - #JOB_ID# ) has updates that correspond to the VMS Requisition #TRUEREQ_ID# for #COMPANY_NAME#. |
|------------|--------------------------------------------------------------------------------------------------------------------------------|

## VMS: New Requisition (Internal)

This notification email is sent when a new VMS Requisition is created.

| Field                       | Selection            |
|-----------------------------|----------------------|
| Email Subject               | VMS: New Requisition |
| Active                      | Yes                  |
| Preview before Sending      |                      |
| Subscriber: Account Manager |                      |
| Subscriber: Recruiter       |                      |
| Users                       |                      |
| Additional Email Addresses  |                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## VMS Req Converted to Job Opportunity (Internal)

This notification email is sent when an Opportunity is created from a VMS requisition.

| Field                       | Selection                            |
|-----------------------------|--------------------------------------|
| Email Subject               | VMS Req Converted to Job Opportunity |
| Active                      | Yes                                  |
| Preview before Sending      |                                      |
| Subscriber: Account Manager |                                      |
| Subscriber: Recruiter       |                                      |
| Users                       |                                      |
| Additional Email Addresses  |                                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## VMS Req Converted to Job Order (Internal)

This notification email is sent when a job order is created from a VMS requisition.

| Field                       | Selection                      |
|-----------------------------|--------------------------------|
| Email Subject               | VMS Req Converted to Job Order |
| Active                      | Yes                            |
| Preview before Sending      |                                |
| Subscriber: Account Manager |                                |
| Subscriber: Recruiter       |                                |
| Users                       |                                |
| Additional Email Addresses  |                                |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## VMS Req Failed (Internal)

This notification email is sent when the VMS Req failed during the import process.

| Field                       | Selection                                |
|-----------------------------|------------------------------------------|
| Email Subject               | VMS Req failed during the import process |
| Active                      | Yes                                      |
| Preview before Sending      |                                          |
| Subscriber: Account Manager |                                          |
| Subscriber: Recruiter       |                                          |
| Users                       |                                          |
| Additional Email Addresses  |                                          |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## VMS Requisition Updated (Internal)

This notification email is sent when a VMS Requisition is updated.

| Field                       | Selection                                                                                            |
|-----------------------------|------------------------------------------------------------------------------------------------------|
| Email Subject               | VMS Requisition ( #TRUEREQ_ID# : #VMS_JOB_TITLE#) has been updated by #VMS_NAME# for #COMPANY_NAME#. |
| Active                      | Yes                                                                                                  |
| Preview before Sending      |                                                                                                      |
| Subscriber: Account Manager |                                                                                                      |
| Subscriber: Recruiter       |                                                                                                      |
| Users                       |                                                                                                      |
| Additional Email Addresses  |                                                                                                      |

|            |                                                                    |
|------------|--------------------------------------------------------------------|
| Email Body | VMS Requisition has been updated by #VMS_NAME# for #COMPANY_NAME#. |
|------------|--------------------------------------------------------------------|

## Web Portal Candidate My Profile Updated (Internal)

This notification email is sent when a Candidate updates My Profile from the Candidate Web Portal.

| Field                       | Selection                               |
|-----------------------------|-----------------------------------------|
| Email Subject               | Web Portal Candidate My Profile Updated |
| Active                      | Yes                                     |
| Preview before Sending      |                                         |
| Subscriber: Account Manager |                                         |
| Subscriber: Recruiter       |                                         |
| Users                       |                                         |
| Additional Email Addresses  |                                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## WC Claim Status or Modified Duty Updated (Internal)

This notification email is sent when WC Claim status or modified duty indicator is updated.

| Field                       | Selection                             |
|-----------------------------|---------------------------------------|
| Email Subject               | Claim Status or Modified Duty updated |
| Active                      | Yes                                   |
| Preview before Sending      |                                       |
| Subscriber: Account Manager |                                       |
| Subscriber: Recruiter       |                                       |
| Users                       |                                       |
| Additional Email Addresses  |                                       |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

---

## WOTC Questionnaire Completed by Candidate (Internal)

---

This notification email is sent when WOTC Form 8850 has been completed by the Candidate.

| Field                       | Selection                                 |
|-----------------------------|-------------------------------------------|
| Email Subject               | WOTC Questionnaire Completed by Candidate |
| Active                      | Yes                                       |
| Preview before Sending      |                                           |
| Subscriber: Account Manager |                                           |
| Subscriber: Recruiter       |                                           |
| Users                       |                                           |
| Additional Email Addresses  |                                           |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Candidate Assigned (External)

This notification email is sent when a Candidate is assigned to a Contract Job.

| Field                                                                                                                               | Selection               |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Email Subject                                                                                                                       | Your New Assignment     |
| Active                                                                                                                              | Yes                     |
| Copy Account Manager                                                                                                                |                         |
| Copy Recruiter                                                                                                                      |                         |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject: |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Candidate Password Reset (External)

This notification email is sent when a Candidate resets his/her Password.

| Field                                                                                                                               | Selection                   |
|-------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| Email Subject                                                                                                                       | Password Reset Notification |
| Active                                                                                                                              | Yes                         |
| Copy Account Manager                                                                                                                |                             |
| Copy Recruiter                                                                                                                      |                             |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject:     |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                             |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Candidate Submitted - Contract (External)

This notification email is sent when a Candidate has been Submitted to a Job.

| Field                                                                                                                               | Selection               |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Email Subject                                                                                                                       | Submittal Confirmation  |
| Active                                                                                                                              | Yes                     |
| Copy Account Manager                                                                                                                |                         |
| Copy Recruiter                                                                                                                      |                         |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject: |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Compass Candidate Applied (External)

This notification email is sent when a candidate applies for a job via Compass.

| Field                       | Selection                                            |
|-----------------------------|------------------------------------------------------|
| Email Subject               | Candidate applied for a job via Compass              |
| Active                      | Yes                                                  |
| Preview before Sending      |                                                      |
| Subscriber: Account Manager |                                                      |
| Subscriber: Recruiter       | Note: This is the Recruiter on the Candidate record. |
| Users                       |                                                      |
| Additional Email Addresses  |                                                      |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## Document eSigned (External)

This notification email is sent when a Candidate eSigns a document.

| Field                                                                                                                               | Selection               |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Email Subject                                                                                                                       | Document eSigned        |
| Active                                                                                                                              | Yes                     |
| Copy Account Manager                                                                                                                |                         |
| Copy Recruiter                                                                                                                      |                         |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject: |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## New Candidate From Portal (External)

This notification email is sent when a new Candidate signs up on the Compass Portal.

| Field                                                                                                                               | Selection               |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Email Subject                                                                                                                       | Welcome!                |
| Active                                                                                                                              | Yes                     |
| Copy Account Manager                                                                                                                |                         |
| Copy Recruiter                                                                                                                      |                         |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject: |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## OB Item Assigned (External)

This notification email is sent when an Onboarding item(s) or package is assigned to a Candidate.

| Field                                                                                                                               | Selection                |
|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Email Subject                                                                                                                       | Onboarding Item Assigned |
| Active                                                                                                                              | Yes                      |
| Copy Account Manager                                                                                                                |                          |
| Copy Recruiter                                                                                                                      |                          |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject:  |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                          |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|

## OB Item Completed (External)

This notification email is sent when a Candidate completes an Onboarding Item.

| Field                                                                                                                               | Selection               |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Email Subject                                                                                                                       | Activity Completed      |
| Active                                                                                                                              | Yes                     |
| Copy Account Manager                                                                                                                |                         |
| Copy Recruiter                                                                                                                      |                         |
| Alternate Notification Details -<br>Defines notification subject<br>and body to be used in Branch<br>Specific cases, if applicable. | Branch:<br><br>Subject: |
| Users to be notified if the<br>recipient is missing email<br>address and cannot be notified.                                        |                         |

|            |  |
|------------|--|
| Email Body |  |
|------------|--|







# Onboarding

**Onboarding** allows you to set up hiring requirements that need to be completed by the candidate. If the requirement is not completed, you can either stop the placement, display a warning (but allow the placement to complete) or do nothing.

There are two methods to set up Onboarding Requirements: Compass and Classic. Compass Requirements can be set up at the Candidate, Company and Job Order levels. Classic Requirements can be set up at the Branch, Company and Job Order levels. For Compass Onboarding, forms required at the time of assignment are a combination of those required at the Candidate level and those required at the Job Order level. For Classic Onboarding, forms required at the time of assignment are a combination of those required at the Branch level and those required at the Job Order level.

This section provides information about the way Adapt deals with Onboarding requirements at the Branch, Candidate, Company and Job Order levels. It is also designed to allow you to think through the various requirements you have (or want to have) and decide what branches they impact and other information pertinent to the Onboarding requirement.

# Onboarding Relationship

Onboarding comes in two types: Compass and Classic. In many ways, these two are similar. However, there are some differences.

Classic Onboarding Forms are added in Administration and can be associated with Branch, Company and Job Order records. Forms required at assignment are a combination of those required at the Branch level (Branch record > Forms segment) and those required at the Job Order level (Job Order record > Onboarding Requirements segment).

Compass Onboarding Items are added in Administration and can be associated with Candidate, Company and Job Order records. Items required at assignment are a combination of those on the Candidate record (Candidate record > Onboarding segment) and those required at the Job Order level (Job Order record > Onboarding Requirements segment).

Onboarding Forms/Items added to the Company record (Company record > Onboarding Requirements segment) automatically default into Job Order records associated with the Company. However, you can edit those requirements at the Job Order. You can add new requirements, remove defaulted requirements and change actions on existing requirements.

Both Classic and Compass Onboarding requirements are enforced at the time of placement. Thus, when performing the assignment/placement workflow, the system checks the following:

- ✓ Classic Onboarding Forms required for the Branch associated with the Job Order. You can view these on the Forms segment of the Branch record in Administration.
- ✓ Compass Onboarding Items assigned to the Candidate being placed on the Job Order. You can view these in the Compass Onboarding grid on the Onboarding segment of the Candidate record.
- ✓ Classic Onboarding Forms and Compass Onboarding Items required at the Job Order. You can view these on the Onboarding Requirements segment of the Job Order record.

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Classic Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Is the requirement associated with a form?                                                                                                                                                        |        |
| If yes, is the form in your Document Library or on a networked drive?                                                                                                                             |        |
| <b>File Name:</b> What is the name of the document?                                                                                                                                               |        |
| <b>File Name:</b> If no form is required, what is the name of the requirement?                                                                                                                    |        |
| <b>Display Name:</b> How would you like the name of the requirement displayed throughout the system?                                                                                              |        |
| <b>Active:</b> Is the requirement active?                                                                                                                                                         |        |
| <b>Group:</b> Is this requirement a hiring form, a tax form or something required by the Client?                                                                                                  |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Requires 2 Signatures:</b> If the requirement is associated with a form and if you are using electronic onboarding, does the form require two signatures?                                      |        |
| <b>Branch:</b> Which of your branches should this requirement apply to?                                                                                                                           |        |
| <b>Branch Req:</b> For each branch listed above, should this requirement be required at the Branch level?                                                                                         |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What section would you like to set up to present your data item on the Compass Portal?                                                                                           |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |

## Compass Onboarding Policies

Use the following sheets to work through the specifics of your onboarding requirements:

| Field/Question                                                                                                                                                                                    | Answer |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Name:</b> What is the name of the item?                                                                                                                                                        |        |
| <b>Description:</b> How would you describe the item?                                                                                                                                              |        |
| <b>Due Date:</b> Once the item is assigned to an employee, how many days does the employee have to complete the item                                                                              |        |
| <b>Item Type:</b> What type of item is this                                                                                                                                                       |        |
| <b>Hiring Requirement:</b> If the candidate has not completed the requirement would you like Adapt to prevent the placement, display a warning (but allow the placement) or do nothing?           |        |
| <b>Storage Location:</b> If the requirement is associated with a form and if you are using electronic onboarding, is the form storage location the vendor or is it an electronic onboarding form? |        |
| <b>Package:</b> Is this item part of a package of items?                                                                                                                                          |        |
| <b>Branch:</b> Should this item apply to a specific Branch or Branches? If so, to which branches should this item apply?                                                                          |        |
| <b>Sections:</b> What sections would you like to set up to present your data items on the Compass Portal?                                                                                         |        |
| <b>Data Items:</b> What Data Items would you like to add to this Onboarding Item? Data Items can be fields, external links or eSign documents.                                                    |        |