Export Demographic People Records to PlanSource

Data mapping

HCM Demographic Export (UKG Ready) integration

HCMDemographicExport-v1_HR — HCMDemographicExport-v1_PlanSource

HCM Dimensions field	PlanSource field	Reports metadata	Required	Comments
Employee Address: Address 1	address_1	EmplPrimaryAddrAddress1,	Not required	
Employee Address: Address 2	address_2	EmplPrimaryAddrAddress2,	Not required	
primary_accountID	benefit_company	EmplAccountId,	Not required	
Employee Date: Birthday	birthdate	DateBirthdayDay,	Required by PlanSource	
Default Job	business_title	Not MappedYet	Not required	
Employee: Cell Phone	cell_phone	EmplCellPhone,	Not required, but at least one phone number is recommended	Not mapped in current process
Employee Address: City	city	EmplPrimaryAddrCity,	Required by PlanSource	
Employee Address: County	county		Not required	Assigned by the system
Employee Address: Country	country	EmplPrimaryAddrCountry,	Required for addresses	
Employee: Base Compensation From	current_salary_effective_on	EmplBaseCompFrom,	Not required	See the example in the Configure the PlanSource Demographic Export > Configure data maps.
Total Compensation	annual_salary		Not required	Calculation Based on Pay Type
TBD (Will require mapping)	division	Mapped in current process	Not required	
AccountId	ee_code	EmplAccountId,	Not required	
Employee: Email (Primary and Secondary)	email	EmplPrimaryEmail,	Not required, but at least one is recommended	
Employee: Employee Id	employee_number	EmplEmployeeId,	Required by HCM and PlanSource	
Employee Status	employee_status	EmplStatusName,	Not required	
Employee Type	employment_level	EmplHREmployeeType,	Not required	
Employee: First Name	first_name	EmplFirstName,	Required by HCM and PlanSource	
Demographics: Gender	gender	EmplGender,	Required by PlanSource	
Employee Date: Hired	hire_date	EmplDateHired,	Required by PlanSource	
Employee: Home Phone	home_phone	EmplHomePhone,	Not required, but at least one phone number is recommended	Not mapped in current process
Employee: Last Name	last_name	EmplLastName,	Required by HCM and PlanSource	
TBD (Will require mapping)	location	Mapped in current process	Not required	
Demographics: Actual Marital Status	marital_status	EmplActualMaritalStatus,	Not required	
Employee: MI	middle_name	EmplMI,	Not required	Not mapped in current process
Pay Type	org_class	EmplHRPayType,	Not required	
User Defined 2	org_payroll_id		Not required	
Employee Date: Re-Hired	rehire_date	EmplDateReHired,	Not required	
Employee Date: Seniority	seniority_date	EmplDateSeniority,	Required by PlanSource	
Employee Date: Benefits	hire_date or rehire_date	EmplDateHired, EmplDateReHired, or EmplDateBenefits	Not required	Can change to eligibility_period_start_date
Employee: SS# (Social Security)	ssn	EmplSS,	Required by PlanSource	
Employee Address: State/Province	state	EmplPrimaryAddrStateId,	Required by PlanSource	
Employee Address: Street	street		Required by PlanSource	Can have 2 lines

HCM Dimensions field	PlanSource field	Reports metadata	Required	Comments
Username	subscriber_code	EmplUserName,	Required by HCM and PlanSource	
Employee Date: Terminated	termination_date	EmplDateTerminated,	Not required	
Description field within Term Reason Code	Termination_reason lookup_code		Not required for full load	
Company Shortname	udef_1	CompShortName,	Not required	Company Shortname (numeric value) must default to the UserDefined 1 field in PlanSource
Employee: Union	union_code	EmplUnion,	Not required	
Employee: username	user_name	EmplUserName,	Not required	
Employee: Work Phone	work_phone	EmplWorkPhone,	Not required, but at least one phone number is recommended	
Employee Address: Postal/Zip Code	zip_code	EmplPrimaryAddrZip,	Required by PlanSource	