berkshire

A Division of Resolution Economics

Data Accuracy Checks Prior to Submission

Here is a list of things that Berkshire checks for in any data submission. Any of these issues that can be resolved prior to data submission means fewer questions regarding your data during the plan preparation process thus reducing the time to prepare your AAPs.

Data Accuracy Checks:

- ☑ ***Submit all data in a single workbook*** – submitting all data in a single workbook will streamline the preparation process.

- ☑ ***Review the data prior to submission*** – reviewing the data prior to submission to Berkshire will eliminate extra steps needed to ensure all data is submitted. Things to look for:
  - ***Required fields*** – all required fields are populated with the corresponding data. For example, the plan code field is populated with plan codes and not EEO categories.
  - ***Employee IDs*** - the format of Employee IDs is consistent across all data tables. Employee ID is unique to each employee; no 2 people have the same Employee ID.
  - ***Plan Codes*** - plan codes are required in all data tables.
  - ***Race & Gender*** – there should be race & gender data for all employees. It is ok to have blank race/gender fields in the applicant data.
  - ***Job Codes -*** All job codes used in the data appear on the job code table. All records in the data tables are assigned a job code.
  - ***Date range*** – ensure all personnel activity records have dates within the data date range. Applicant records should only include applicant pools associated with the hires in the hire log.
  - ***Roster records*** –
    - Each employee should appear on the roster only once.
    - Anyone in a term status as of the plan date should not be included in the roster.
    - There are no employees on the roster with a hire date after the plan date.
    - Ensure that employees in the roster hired during the plan year are accounted for in the new hire log.
    - Hire dates on the roster correspond to their most recent hire, not their most recent transfer.
  - ***Hire log***– ensure the hire log contains only external hires. Move any internal transfers/promotions to the transfer/promotion log.
  - ***Transfer/Job Change lob*** – ensure there are no promotion records in this log.

Applicant Data Accuracy Checks:

- ☑ Check that all new hires appear in applicant data with a disposition code of hired including their corresponding applicant pool. If hired from an evergreen/parent requisition, provide the corresponding evergreen/parent requisition data.
- ☑ Check that all applicants with a disposition code of hired appear in the new hire log.
- ☑ Check that internal applicants for positions are included in the applicant data and, if selected, are marked as internal successful or internal hire. Internal hires should not have the same disposition as an external hire.
- ☑ All internal applicants should have race and gender information.
- ☑ Check all requisitions in the applicant table to ensure they were closed with a selection. If it wasn't filled, remove the requisition, including the entire applicant pool, from the table. The race, gender, IWD, and PV status in the applicant data should match the race, gender, IWD, and PV status in the new hire data.