

# HROA Service Taxonomy

## Services

Client  
Responsibility

Provider  
Responsibility

The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.

### Definitions

**Provider:** The responsible party who is to provide outsourced services to by the buyer

**Buyer:** An organization that is outsourcing services to a provider(s).

**Third Party Vendor:** A product or service vendor associated with the buyer's processes who will work in conjunction with outsourced services

## 1 Organizational design and development

Organizational design is the alignment of structure, process, rewards, metrics and talent with the strategy of the business. Organization design may involve strategic decisions, but is properly viewed as a path to effective strategy execution. The design process nearly always entails making trade-offs of one set of structural benefits against another.

### 1.1 Organization Design and Development strategy and policies

- |       |  |   |
|-------|--|---|
| 1.1.1 | Determine organizational development strategy  | ✓ |
| 1.1.2 | Strategic Programs - Business Development (buy or build), Organizational Alliances, Organizational Transformation, Cultural Change     | ✓ |
| 1.1.3 | Organizational Programs - Self-Directed Work Teams, Virtual Teams, Team Building/Group Facilitation-Learning                           | ✓ |
| 1.1.4 | Tactical Programs - Scorecards, Re-engineering, Quality (Six Sigma, Lean, TQM, ISO), Management by Objectives, Roles, Responsibilities | ✓ |
| 1.1.5 | Determine and document organizational development policy   | ✓ |

### 1.2 Establish accountability for Organization Design processes

- |       |  |   |
|-------|--|---|
| 1.2.1 | Financial Plans - Business case, cost to achieve, expected return  | ✓ |
| 1.2.2 | Maintain and support talent management systems that support OD objectives and their related interfaces     | ✓ |
| 1.2.3 | Manage the relationship with applicable OD Providers   | ✓ |
| 1.2.4 | Provide the ability to link data between current HR data systems to support employee development processes | ✓ |

### 1.3 Organization design assessment

- |       |  |   |
|-------|--|---|
| 1.3.1 | Conduct organization design assessment   | ✓ |
| 1.3.2 | Identify organization context and strategic intent   | ✓ |
| 1.3.3 | Conduct as-is organizational assessment; analyze processes and workflow (inputs and outputs, products and information, customer interaction) | ✓ |
| 1.3.4 | Determine staffing - expertise (existing and required), short-term, long-term  | ✓ |
| 1.3.5 | Conduct attitude and pulse surveys and recommend action plans from the results of attitude/pulse surveys                                     | ✓ |
| 1.3.6 | Develop organization scorecard   | ✓ |

### 1.4 Develop conceptual design

- |       |   |   |
|-------|---|---|
| 1.4.1 | Develop organization principles and structural implications | ✓ |
| 1.4.2 | Select generic organization model and adapt                 | ✓ |
| 1.4.3 | Identify key management processes required                  | ✓ |

### 1.5 Develop detailed organization design

- |       |   |   |
|-------|---|---|
| 1.5.1 | Detail design including measures and controls and feedback loops (consider structures, people, processes, rewards, and tasks or work systems) | ✓ |
| 1.5.2 | Review overall hierarchy  | ✓ |
| 1.5.3 | Design the decision-making processes  | ✓ |
| 1.5.4 | Design subsequent organization structure levels   | ✓ |
| 1.5.5 | Develop management (organizational) processes   | ✓ |
| 1.5.6 | Validate organization structure   | ✓ |

### 1.6 Design teams and jobs

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1. 6. 1	✓	
1. 6. 2	✓	
1. 6. 3	✓	
1. 6. 4	✓	
1. 6. 5	✓	
1. 6. 6	✓	
1. 6. 7	✓	
1. 6. 8	✓	
1. 7		
<b>Organization Development and Organization Effectiveness</b>		
1. 7. 1	✓	
1. 7. 2	✓	
1. 7. 3	✓	
1. 7. 4	✓	
1. 8		
<b>Review current organization performance</b>		
1. 8. 1	✓	
1. 8. 2	✓	
1. 8. 3	✓	
1. 8. 4	✓	
1. 8. 5	✓	
1. 8. 6	✓	
1. 8. 7	✓	
1. 9		
<b>Determine allocation of resources</b>		
1. 9. 1	✓	
1. 9. 2	✓	
1. 9. 3	✓	
1. 10		
<b>Develop performance indicators</b>		
1. 10. 1	✓	
1. 10. 2	✓	
1. 11		
<b>Implement a change program</b>		
1. 11. 1	✓	
1. 11. 2	✓	
1. 11. 3	✓	
1. 11. 4	✓	
1. 11. 5	✓	
1. 11. 6	✓	
1. 11. 7	✓	
1. 11. 8	✓	
1. 11. 9	✓	

### 2 Workforce planning

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Workforce planning refers to the general management and planning of activities related to ensuring skills required in an organization to achieve business objectives are available when needed and are cost-effective.

### 3 Recruitment

Recruiting is the process of identifying and hiring the best-qualified candidate (from within or outside of an organization) for a job vacancy, in a most timely and cost effective manner.

#### 3. 1 Recruitment strategy and policies

- 3. 1. 1 Develop organizational recruiting strategies and policies for experienced hires, entry level hires, executives, university graduates, interns, apprentices, temporary workers, seasonal workers, rehires ✓
- 3. 1. 2 Develop employee referral strategies and polices ✓
- 3. 1. 3 Forecast workforce trends ✓
- 3. 1. 4 Confirm and manage recruitment budget and approval processes ✓
- 3. 1. 5 Establish workforce resourcing plan and strategy ✓
- 3. 1. 6 Develop and manage employer brand and branding strategies ✓

#### 3. 2 Requisition process

- 3. 2. 1 Develop job requisition ✓
- 3. 2. 2 Conduct needs assessment with hiring manager ✓
- 3. 2. 3 Develop job description, qualification requirements and indicative compensation and benefits package ✓
- 3. 2. 4 Submit job requisition request to fill a job vacancy ✓
- 3. 2. 5 Approve and sign-off job requisition documentation ✓
- 3. 2. 6 Notify manager of requisition status (approved/denied) ✓

#### 3. 3 Candidate sourcing

- 3. 3. 1 Develop sourcing strategy ✓
- 3. 3.. 2 Develop, manage and maintain job posting systems (internal) ✓
- 3. 3.. 3 Develop, manage and maintain job posting systems (external) ✓
- 3. 3.. 4 Select recruiting / resourcing service providers ✓
- 3. 3.. 5 Manage retained recruiting/resourcing service provider relationships ✓
- 3. 3.. 6 Manage and coordinate with third party vendors producing recruiting literature and marketing materials ✓
- 3. 3.. 7 Manage design and messaging for company website, advertising, e-recruiting, job boards and other sources of direct recruitment ✓
- 3. 3.. 8 Coordinate advertising placement, e-recruiting, job boards, and other sources of direct recruiting placement ✓

3. 3. 9 Process candidate applications

✓

3. 3.. 10 Match candidates to job requisition

✓

3. 3.. 11 Conduct initial candidate screening against job description/ qualifications or pre-defined initial screening criteria

✓

3. 3.. 12 Produce long list of candidates to progress to the subsequent stage of the recruitment process

✓

3. 3.. 13 Select candidates from the long list for assessment and/or interview

✓

3. 3.. 14 Notify unsuccessful candidates from initial screening stage

✓

#### 3. 4 Applicant tracking

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3.	4. 1		✓
3.	4. 2		✓
3.	4. 3		✓
3.	4. 4		✓
3.	4. 5		✓
3.	4. 6		✓
3.	4. 7		✓
3.	4. 8		✓
3.	<b>5</b>		
3.	<b>5. 1</b>	✓	
3.	<b>5. 2</b>	✓	
3.	<b>5. 3</b>		✓
3.	<b>5. 4</b>		✓
3.	<b>5. 5</b>		✓
3.	<b>5. 6</b>		✓
3.	<b>5. 7</b>	✓	
3.	<b>6</b>		
3.	<b>6. 1</b>	✓	
3.	<b>6. 2</b>	✓	
3.	<b>6. 3</b>	✓	
3.	<b>6. 4</b>	✓	
3.	<b>6. 5</b>	✓	
3.	<b>6. 6</b>		✓
3.	<b>6. 7</b>		✓
3.	<b>6. 8</b>		✓
3.	<b>6. 9</b>		✓
3.	<b>6. 10</b>		✓
3.	<b>6. 11</b>		✓
3.	<b>7</b>		
3.	<b>7. 1</b>		✓
3.	<b>7. 2</b>		✓
3.	<b>7. 3</b>		✓
3.	<b>7. 4</b>		✓
3.	<b>8</b>		
3.	<b>8. 1</b>		✓

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3. 8. 2	✓	
3. 8. 3		✓
3. 8. 4		✓
3. 8. 5	✓	
3. 8. 6		✓
3. 8. 7		✓
3. 8. 8		✓
3. 8. 9		✓
3. 8. 10	✓	
3. 8. 11	✓	
3. 8. 12		✓
3. 9		
3. 9. 1	✓	
3. 9. 2	✓	
3. 9. 3		✓
3. 9. 4		✓
3. 9. 5		✓
3. 9. 6		✓
3. 9. 7		✓
3. 10		
3. 10. 1	✓	
3. 10. 2	✓	
3. 10. 3	✓	
3. 10. 4	✓	
3. 10. 5	✓	
3. 10. 6	✓	
3. 10. 7	✓	
3. 10. 8	✓	
3. 10. 9	✓	
<b>4</b>		
<b>Performance management</b>		
<p>Performance management is a continuous process of communicating and clarifying job responsibilities, priorities and performance expectations in order to ensure mutual understanding between supervisor and employee. Its objectives are to increase two-way communication between supervisors and employees, identify and resolve performance problems, recognize quality performance and provide a basis for administrative decisions such as promotions, succession and strategic planning, and pay for performance.</p>		
4. 1		
4. 1. 1	✓	
4. 1. 2	✓	
4. 1. 3	✓	

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4.	1. 4	✓	
4.	<b>2</b>		
4.	2. 1		✓
4.	2. 2		✓
4.	<b>3</b>		
4.	3. 1	✓	
4.	3. 2		✓
4.	3. 3		✓
4.	3. 4		✓
4.	<b>4</b>		
4.	4. 1	✓	
4.	4. 2	✓	
4.	4. 3	✓	
4.	4. 4	✓	
4.	4. 5		✓
4.	4. 6		✓
4.	<b>5</b>		
4.	5. 1		✓
4.	5. 2		✓
4.	<b>6</b>		
4.	6. 1		✓
4.	6. 2		✓
4.	6. 3		✓
4.	6. 4		✓
<b>5</b>	<b>Learning management</b>		
<p>Learning management is the administration, documentation, tracking, and reporting of training programs, classroom and online events, e-learning programs, and training content. Typical outsourcing scope includes centralization and automation, self-service, assembly and delivery of learning content, consolidation of training initiatives on a scalable web-based platform, and personalization of content to enable knowledge reuse.</p>			
5.	<b>1</b>		
5.	1. 1	✓	
5.	1. 2	✓	
5.	1. 3	✓	
5.	1. 4	✓	
5.	1. 5	✓	
5.	<b>2</b>		
5.	2. 1		✓
5.	2. 2		✓
5.	<b>3</b>		

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5.	3. 1		✓
5.	3. 2		✓
5.	3. 3		✓
5.	3. 4		✓
5.	3. 5		✓
5.	3. 6		✓
5.	3. 7		✓
5.	3. 8		✓
5.	4	<b>Learning delivery</b>	
5.	4. 1		✓
5.	4. 2		✓
5.	4. 3		✓
5.	4. 4		✓
5.	4. 5		✓
5.	5	<b>Learning administration</b>	
5.	5. 1		✓
5.	5. 2		✓
5.	5. 3		✓
5.	5. 4		✓
5.	5. 5		✓
5.	5. 6		✓
5.	5. 7		✓
5.	5. 8		✓
5.	5. 9		✓
5.	5. 10		✓
5.	5. 11		✓
<b>6</b>	<b>Compensation management</b>		
<p>Compensation Management is the activities involved in providing monetary rewards including salary, bonuses, incentive, stock, total rewards, etc. It may additionally involve benchmarking, surveys, salary planning, and reporting.</p>			
6.	1	<b>Compensation strategy and policies</b>	
6.	1. 1	✓	
6.	1. 2	✓	
6.	1. 3	✓	
6.	2	<b>Compensation planning</b>	
6.	2. 1	✓	
6.	2. 2	✓	

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6.	2.	3	Determine the process for managing the annual salary increase program	✓	
6.	2.	4	Develop and approve program communication materials	✓	
6.	2.	5	Monitor completion of salary planning worksheets via compensation administration and planning system		✓
6.	2.	6	Correct errors and request approvals for policy exceptions		✓
6.	2.	7	Approve/deny salary and/or job change recommendations	✓	
6.	2.	8	Notify managers of final approved salary increases for their employees via the compensation administration and planning system		✓
6.	2.	9	Conduct adverse impact analysis based on reports produced by service provider and develop action plans as needed		✓
6.	2.	10	Monitor compliance		✓
6.	2.	11	Approve/deny exceptions to policy/process		✓
6.	2.	12	Oversee any off-cycle compensation adjustments		
6.	2.	13	Notify managers of approved off-cycle adjustments for their employees		✓
6.	2.	14	Define the timing and format for online total compensation statements	✓	
6.	2.	15	Prepare and distribute salary planning and training materials approved by the company to managers per agreed schedule via the compensation administration and planning system		✓
6.	2.	16	Track completion of salary planning materials by managers		✓
6.	2.	17	Track proposed salary increase spend against budgets and provide reporting and workflow to the company		✓
6.	2.	18	Validate salary plans for and adherence to policy and business rules approved by the company		✓
6.	2.	19	Route salary planning materials for required approvals		✓
6.	2.	20	Track and report on status of process		✓
6.	2.	21	Produce analytical report for the company to use in assessing adverse impact of actions on selected groups and categories of employees	✓	
6.	2.	22	Track returning leave of absence employees for missed merit increases and process upon return to work		✓
6.	2.	23	Calculate retroactive-adjustments, if applicable, according to the company's direction		✓
6.	2.	24	Send approved salary actions to payroll service provider for processing		✓
6.	2.	25	Notify employees and managers of adjustment		✓
6.	2.	26	Provide compensation system that supports the administration of off cycle compensation adjustments and job changes		✓
6.	2.	27	Provide a compensation system that supports the servicing of global requirements inclusive of 13th, 14th or 16th month payments where required by country based pay legislation		✓
6.	3	<b>Plan design and market analysis</b>			
6.	3.	1	Design and manage base and incentive pay programs including number and type of pay structures/plans, salary and incentive levels, and pay ranges/hour wage structures	✓	
6.	3.	2	Approve periodic adjustments to pay and incentive structures	✓	
6.	3.	3	Analyze market data and make recommendations regarding pay structure adjustments		✓
6.	3.	4	Prepare cost analyses of proposed structure adjustments	✓	✓
6.	3.	5	Enter approved pay structure rates into the administration system		✓
6.	4	<b>Salary surveys and job evaluation</b>			

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6.	4. 1	Establish the company's annual budget for salary surveys	✓
6.	4. 2	Determine surveys to participate in or purchase to gain a comprehensive perspective of competitive pay practices in applicable labor markets	✓
6.	4. 3	Provide source data to help service provider define benchmark jobs and survey job matches	✓
6.	4. 4	Review and validate recommended survey job matches	✓
6.	4. 5	Provide additional data as needed for inclusion in surveys (e.g., company statistics, salary budgets, program design elements, etc.)	✓
6.	4. 6	Review final survey input prior to submission	✓
6.	4. 7	Make recommendations regarding key surveys to assist company's insight into competitive pay practices in applicable labor markets	✓
6.	4. 8	Complete survey related to data maintained by service provider	✓
6.	4. 9	Notify the company of additional data needs	✓
6.	4. 10	Prepare survey questionnaire, review and coordinate final submission	✓
6.	4. 11	Combine survey market data from all sources into a common database and link data to benchmark jobs	✓
6.	4. 12	Define the job evaluation program and job classification system and code structure	✓
6.	4. 13	Develop job documentation and provide to service provider for evaluation	✓
6.	4. 14	Provide additional data to service provider to complete evaluation recommendation	✓
6.	4. 15	Make decisions regarding final job grading and FLSA status	✓
6.	4. 16	Perform ad hoc job evaluations for new or changed jobs based on the company's defined job evaluation approach and job documentation provided	✓
6.	4. 17	Provide draft market pricing, survey information related to FLSA (US) or other standard prevalence where available, recommended grade, and evaluation documentation within business days of receipt of request	✓
6.	4. 18	Perform and report on impact analyses of evaluations	✓
6.	5	<b>Compensation application and reporting</b>	
6.	5. 1	Provide timely and accurate transmission of data input files sent to service provider from the company	✓
6.	5. 2	Define roles and required security for access to data, workflow and reporting	✓
6.	5. 3	Define and approve all required IT provisions relative to data security, system infrastructure, authentication and sign on and data management and transmission	✓
6.	5. 4	Provide and maintain a system that is adherent to all company requirements for IT provisions	✓
6.	5. 5	Provide and maintain a tool that allows single sign on access from the company approved and defined system	✓
6.	5. 6	Provide and maintain a configurable tool that supports multiple business rules and roles applicable to managing the required compensation work flow, processes and data views	✓
6.	5. 7	Provide and maintain a tool that supports company or compliance oriented language requirements for compensation related notices and web content	✓
6.	5. 8	Provide and maintain a tool that supports multiple currencies for display, entry, and reporting of compensation amounts	✓
6.	5. 9	Provide and maintain a tool that facilitates the utilization and management of compensation planning and workflow hierarchy	✓
6.	5. 10	Provide and maintain a compensation planning and administration tool that allows for key data fields as defined by the company.	✓
6.	5. 11	Provide and maintain a compensation planning and administration tool that facilitates the focal compensation planning cycle including multi-dimensional business rules and configuration for:	✓
6.	5. 12	Provide a tool that allows client compensation professionals and managers to run reports and analytics including ability to download to common business tools (MS Excel, MS Access)	✓

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6.	5.	13		✓
6.	5.	14		✓
6.	5.	15		✓
6.	6.		<b>Administration services and support</b>	
6.	6.	1		✓
6.	6.	2		✓
6.	6.	3	✓	✓
6.	6.	4		✓
6.	6.	5		✓
6.	6.	6		✓
6.	6.	7		✓
6.	6.	8		✓
<b>7</b>	<b>Mobility and international assignments</b>			
<p>Mobility includes a range of business processes to transfer employees, their families, and/or entire departments of a business to a new location. Relocation services are not synonymous with moving/relocation companies as not all of these companies offer "relocation services".</p> <p>Such business processes can include domestic residential services where an employee moves within a country or state as well as international relocation services which include planning for working abroad. An agency providing relocation services directs and manages the process of relocation including arranging necessary documents, finding a new house, finding a school for children and/or introducing fresh expatriates to the local culture.</p>				
7.	1.		<b>Global mobility strategy and policies</b>	
7.	1.	1		✓
7.	1.	2	✓	
7.	1.	3	✓	
7.	2.		<b>Assignment initiation services</b>	
7.	2.	1	✓	
7.	2.	2		✓
7.	2.	3		✓
7.	2.	4		✓
7.	2.	5		✓
7.	2.	6		✓
7.	2.	7		✓
7.	3.		<b>On-assignment services</b>	
7.	3.	1		✓
7.	3.	2		✓
7.	3.	3		✓
7.	3.	4		✓
7.	3.	5		✓
7.	3.	6		✓
7.	4.		<b>Repatriation services</b>	

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7. 4. 1		✓
7. 4. 2		✓
7. 4. 3		✓
7. 4. 4		✓
7. 4. 5		✓
7. 5		
<b>Tax services</b>		
7. 5. 1		✓
7. 5. 2		✓
7. 5. 3		✓
7. 5. 4		✓
7. 5. 5		✓
7. 5. 6		✓
7. 6		
<b>Household goods shipment</b>		
7. 6. 1		✓
7. 6. 2		✓
7. 6. 3		✓
7. 6. 4		✓
7. 6. 5		✓
7. 6. 6		✓
7. 7		
<b>Vendor Management</b>		
7. 7. 1		✓
7. 7. 2		✓
<b>8</b>	<b>Employee data management</b>	
<p>Employee Data Management activities include updating, maintaining, and managing data related to Employees. Administration primarily takes place in the human resources information system (HRIS) which is the system of record.</p>		
8. 1		
<b>Employee Data Management Strategy and Policy</b>		
8. 1. 1	✓	
8. 1. 2	✓	
8. 1. 3		✓
8. 1. 4		✓
8. 2		
<b>Accountability for data management</b>		
8. 2. 1		✓
8. 2. 2		✓
8. 2. 3	✓	
8. 2. 4		✓
8. 3		
<b>Employee Data Management Solution</b>		
8. 3. 1		✓
8. 3. 2		✓
8. 4		
<b>Data Management Services</b>		
8. 4. 1		
<b>Organization Data Management Services</b>		

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8	4.	1.	1	Update organization related data through self-service	✓	
8	4.	1.	2	Notify service provider of organization data change	✓	
8	4.	1.	3	Update organization related data on HRIS		✓
8	4.	1.	4	Provide electronic notification to requestor of completion		✓
8	4.	2		<b>Employee life cycle data management services</b>		
8	4.	2.	1	Employee On boarding		
8	4.	2.		New Hire Instruction	✓	
8	4.	2.		Employee onboarding related data administration		✓
8	4.	2.	2	Promotion, demotion, transfer, suspension and job reclassifications		
8	4.	2.		Provide approved promotion, demotion, transfer, suspension or job reclassification request	✓	
8	4.	2.		Process approved request in the HRIS		✓
8	4.	2.		Provide electronic notification to managers, HR and other identified parties of process completion		✓
8	4.	2.	3	Separations – voluntary, involuntary, retirement, death		✓
8	4.	2.		Notify service provider of employee separation	✓	
8	4.	2.		Communicate with works councils and unions for involuntary separation	✓	
8	4.	2.		Initiate separation process via electronic forms		✓
8	4.	2.		Coordinate Outplacement		✓
8	4.	2.		Coordinate Unemployment claim		✓
8	4.	2.		Coordinate insurance related claims		✓
8	4.	2.		Coordinate and confirm collection of client property		✓
8	4.	2.		Schedule and coordinate required departure meetings		✓
8	4.	2.		Communicate to service provider provisions of the separation agreement	✓	
8	4.	2.		Notify payroll of provisions of the separation agreement		✓
8	4.	2.		Provide electronic notification to third parties and internal functions as specified		✓
8	4.	2.		Process separation transaction in the HRIS		✓
8	4.	2.	4	Data changes for populations without access to self-service		
8	4.	2.		Provide data change instruction	✓	
8	4.	2.		Submit required supporting evidence electronically	✓	
8	4.	2.		Perform data change on HRIS		✓
8	4.	2.		Process electronic or image documentation		✓
8	4.	2.		Retain electronic images received from the client for processing of employee related data per client electronic records retention policy		✓
8	4.	2.		Maintain electronic data		✓
8	4.	2.		Maintain physical employee records	✓	

## HROA Service Taxonomy

Services		Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>			
8	4. 2.		
8	4. 2.	✓	
8	4. 2.		✓
8	4. 2.		✓
8	4. 2.		✓
<b>9</b>	<b>Employee relations</b>		
<p>Employee relations refers to the general management and planning of activities related to developing, maintaining, and improving employee relationships by communicating with employees, processing grievances, disputes, and related activities.</p>			
9.	<b>1</b>	<b>Employee relations strategies and policies</b>	
9.	1. 1	✓	
9.	1. 2	✓	
9.	1. 3	✓	
9.	1. 4	✓	
9.	<b>2</b>	<b>Industrial relations strategies and policies</b>	
9.	2. 1	✓	
9.	2. 2	✓	
9.	2. 3	✓	
9.	2. 4	✓	
9.	2. 5	✓	
9.	2. 6		✓
9.	2. 7		✓
9.	<b>3</b>	<b>Works council strategies and policies</b>	
9.	3. 1	✓	
9.	3. 2	✓	
9.	3. 3	✓	
9.	3. 4		✓
9.	3. 5		✓
9.	3. 6		✓
9.	<b>4</b>	<b>Disciplinary, appeal and grievance management</b>	
9.	4. 1	<b>Disciplinary administration</b>	
9.	4. 1. 1		✓
9.	4. 1. 2		✓
9.	4. 1. 3		✓
9.	4. 1. 4		✓
9.	4. 1. 5		✓

## HROA Service Taxonomy

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9. 4. 1. 6		✓
9. 4. 2		
<b>Appeal administration</b>		
9. 4. 2. 1		✓
9. 4. 2. 2		✓
9. 4. 2. 3		✓
9. 4. 2. 4		✓
9. 4. 3		
<b>Grievance administration</b>		
9. 4. 3. 1		✓
9. 4. 3.. 2		✓
9. 4. 3.. 3		✓
9. 4. 3.. 4		✓
9. 5		
<b>Employee relations advice and guidance</b>		
9. 5. 1	✓	
9. 5. 2	✓	
9. 5. 3	✓	
9. 6		
<b>Employee relations administration</b>		
9. 6. 1		✓
9. 6. 2		✓
9. 6. 3		✓
9. 6. 4		✓
9. 6. 5	✓	
9. 6. 6		✓
<b>10</b>	<b>Benefits management</b>	
<p>Benefits administration includes the administration of many aspects of employee benefit plans including Health and Welfare, Defined Benefit and Defined Contribution. Many employee benefit plans have highly technical aspects and complex administration which are addressed through outsourcing.</p>		
<p>For Example - the following benefit types could be outsourced based on final client requirements (Medical, Dental, Vision, Prescription Drug, Basic EAP (non-electable), Basic and Optional STD, Basic and Optional LTD, Basic Life, Supplemental Life, Basic and Supplemental Spouse Life, Child Life, Basic and Optional AD&amp;D for Employee/Spouse/Child(ren), HC FSA, DC FSA, HSA and LPSFA, Parking, Transit Accounts, Option based Group Legal, Vacation Buy, and Business Travel Accident)</p>		
10. 1		
<b>Benefits strategy and policies</b>		
10. 1. 1	✓	
10. 1. 2	✓	
10. 1. 3	✓	
10. 2		
<b>Benefits enrollment - ongoing for new hires, newly eligibles, family status changes, new retirees, survivors, qualified medical child support orders</b>		
10. 2. 1		
<b>Provide enrollment opportunity notification</b>		
10. 2. 1. 1		✓

## HROA Service Taxonomy

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10. 2. 1.	2	Deliver enrollment opportunity notification		✓
10. 2. 2.		<b>Provide confirmation of enrollment elections / default elections</b>		
10. 2. 2.	1	Create confirmation of elections		✓
10. 2. 2.	2	Deliver confirmation of elections		✓
10. 2. 3.		<b>Calculate payroll deductions and transmit to payroll service provider</b>		
10. 2. 4.	1	Calculate per pay period deductions for each client employee and transmit deductions file to client payroll administrator		✓
10. 3.		<b>Annual enrollment</b>		
10. 3. 1.		Plan and manage annual enrollment project	✓	
10. 3. 2.		Communicate potential plan design changes for upcoming plan year, and confirm key dates associated with any new plan year updates; confirm plan design changes, as well as accuracy of new plan year rates and ZIP codes	✓	
10. 3. 3.		Create and manage annual enrollment project plan		✓
10. 4.		<b>Administer plan design, rate and eligibility changes</b>		
10. 4. 1.		Coordinate new plan year updates, including upcoming year plan design changes, rates, and ZIP codes for client carriers		✓
10. 4. 2.		Test all changes to verify compliance with submitted documentation and readiness for client testing		✓
10. 4. 3.		Participate in client testing and approve system set-up for new plan year	✓	
10. 4. 4.		Manage all communication to client employees and managers related to annual enrollment and new plan year updates	✓	
10. 4. 5.		Manage client carrier relationships	✓	
10. 5.		<b>Calculate payroll deductions and transmit to payroll service provider</b>		
10. 5. 1.		Calculate per pay period deductions for each client employee and transmit deductions file to client payroll administrator		✓
10. 5. 2.		Process benefits during concurrent plan years		✓
10. 5. 3.		Support concurrent plan year processing on an ongoing basis for up to two consecutive plan years		✓
10. 6.		<b>Benefits administration</b>		
10. 6. 1.		<b>Determine eligibility and provide updates</b>		ü
10. 6. 1. 1.		Support employee, client, and third party vendor inquiries		✓
10. 6. 1. 2.		Respond to inquiries regarding eligibility		✓
10. 6. 1. 3.		Respond to inquiries regarding benefit plans		✓
10. 6. 1. 4.		Respond to inquiries regarding benefits strategy and policy, or regarding previous history unknown to service provider	✓	
10. 6. 1. 5.		Update benefits data		ü
10. 6. 1. 6.		Retain benefits data		ü
10. 6. 1. 7.		Report benefits data		ü
10. 6. 2.		<b>Audit family status changes and verify eligibility</b>		
10. 6. 2. 1.		Audit family status changes; request audited employees to provide required documentation		✓
10. 6. 2. 2.		Review submitted documentation to verify compliance with client-specified rules; terminate coverage if documentation is non-compliant		✓
10. 6. 2. 3.		Store all documentation received		✓
10. 6. 3.		<b>Terminate dependent coverage</b>		
10. 6. 3. 1.		Terminate dependent coverage in accordance with client plan rules		✓
10. 6. 3. 2.		Report dependent termination date to client carriers		✓
10. 6. 3. 3.		Send data to client COBRA service provider for terminated dependents		✓

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<b>10. 6. 4</b>		<b>Process evidence of insurability requirements</b>		
10. 6. 4. 1		Pend life insurance elections in accordance with client and/or client carrier evidence of insurability (EOI) requirements		✓
10. 6. 4. 2		Provide and/or confirm accuracy of information required to complete EOI form (e.g., client employee annual salary) before employee submits completed form to carrier	✓	
10. 6. 4. 3		Monitor status of EOI submission directly with client carrier; support pending elections until receipt of EOI approval from carrier		✓
10. 6. 4. 4		Adjust benefits records, update payroll records, and generate and notify employee upon receipt of client carrier determination		✓
10. 6. 4. 5		Collect beneficiary designations		✓
<b>10. 6. 5</b>		<b>Manage appeals for exceptions</b>		
10. 6. 5. 1		Review submitted appeals; approve or deny pursuant to any client-defined pre-approved exceptions; escalate other appeals to client for approval / denial		✓
10. 6. 5. 2		Provide list of pre-approved exceptions; review escalated requests and supporting data; approve or deny appeals; notify employee of decision in writing; notify service provider of decision	ü	
10. 6. 5. 3		Update systems to reflect client decision		✓
10. 6. 5. 4		Process haste enrollments		✓
<b>10. 7</b>		<b>Benefits service provider management, reporting and payment</b>		
10. 7. 1		Manage benefits carrier relationships	✓	
<b>10. 7. 2</b>		<b>Report eligibility and premiums to benefits carriers</b>		✓
10. 7. 2. 1		Post eligibility files		✓
10. 7. 2. 2		Acknowledge receipt of weekly eligibility files, and report any eligibility discrepancies to service provider		
10. 7. 2. 3		Track acknowledgement of file receipt and follow-up with any client carrier not providing such acknowledgement		✓
10. 7. 2. 4		Coordinate with carriers to seek to resolve any load report errors		✓
<b>10. 8</b>		<b>Disburse premiums to benefits providers</b>		
10. 8. 1		Report to client premium amounts due to each benefit carrier		✓
10. 7. 2		Provide funds to service provider to pay premiums to benefit carriers	✓	
10. 7. 3		Report and disburse premiums to benefit carriers and coordinate with carriers to seek to resolve any discrepancies related to premiums		✓
10. 7. 4		Provide reports to client showing current active enrollment for each benefit carrier and any data added/changed/deleted since previous reporting period		✓
10. 8. 5		Calculate retroactive premiums		✓
<b>10. 9</b>		<b>Advocacy services</b>		
10. 9. 1		Coordinate exception claims with benefits service providers		✓
10. 9. 2		Make exception determinations	✓	
10. 9. 3		Notify employee of exception status and resolution		✓
<b>10. 10</b>		<b>Ancillary benefit services (USA example)</b>		
10. 10. 1		Tuition reimbursement - US/Canada		✓
10. 10. 1. 1		Process pre-approvals		✓
10. 10. 1. 2		Process and adjudicate reimbursement requests		✓
10. 10. 1. 3		Administer reimbursement payments		✓
10. 10. 1. 4		Manage appeals	✓	
<b>10. 10. 2</b>		<b>Flexible spending account (FSA) administration - US</b>		

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10. 10. 2. 1		✓
10. 10. 2. 2		✓
10. 10. 2. 3		✓
10. 10. 2. 4		✓
10. 10. 2. 5		✓
10. 10. 3		
<b>Commuter benefit administration - US</b>		
10. 10. 3. 1		✓
10. 10. 3. 2		✓
10. 10. 3. 3		✓
10. 10. 3. 4		✓
10. 10. 4		
<b>COBRA administration - US</b>		
10. 10. 4. 1		✓
10. 10. 4. 2		✓
10. 10. 4. 3		✓
10. 10. 4. 4		✓
10. 10. 4. 5		✓
10. 10. 4. 6		✓
10. 10. 4. 7		✓
10. 10. 4. 8		✓
10. 10. 4. 9		✓
10. 10. 4. 10		✓
10. 10. 4. 11		✓
10. 10. 4. 12		✓
10. 10. 5		
<b>Leave administration - US</b>		
10. 10. 5. 1		✓
10. 10. 5. 2		✓
10. 10. 5. 3		✓
10. 10. 5. 4		✓
10. 10. 5. 5		✓
10. 10. 5. 6		✓
10. 10. 5. 7		✓
<b>11</b>	<b>Retirement management</b>	
<p>Retiree management includes the administration of many aspects of retiree benefit plans including Health and Welfare, Defined Benefit and Defined Contribution. Many retiree benefit plans have highly technical aspects and complex administration which are addressed through outsourcing.</p>		
11. 1		
<b>Retirement strategy and policies</b>		
11. 1. 1	✓	
11. 1. 2	✓	

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11. 1. 3	✓	
11. 1. 4	✓	
11. 2		
<p><b>Retirement plan enrollment - ongoing (new hires, newly eligibles, new retirees, survivors, terminated vesteds, terminated non-vesteds, inactive employees, beneficiaries, alternate payees, joint annuitants )</b></p>		
11. 2. 1		✓
11. 2. 2		✓
11. 2. 3		✓
11. 2. 4		✓
11. 3		
<p><b>Retirement plan annual enrollment for applicable plan(s)</b></p>		
11. 3. 1	✓	
11. 3. 2	✓	
11. 3. 3		✓
11. 3. 4		✓
11. 4		
<p><b>Retirement plan-related communications</b></p>		
11. 4. 1		✓
11. 4. 2		✓
11. 4. 3		✓
11. 4. 4		✓
11. 4. 5		✓
11. 4. 6		✓
11. 5		
<p><b>Retirement plan service provider management, reporting and payment</b></p>		
11. 5. 1		✓
11. 5. 2		✓
11. 5. 3		✓
11. 6		
<p><b>Defined benefit administration</b></p>		
11. 6. 1		✓
11. 6. 2		✓
11. 6. 3		✓
11. 6. 4		✓
11. 6. 5		✓
11. 6. 6		✓
11. 6. 7		✓
11. 6. 8		✓
11. 6. 9		✓
11. 6. 10		✓
11. 6. 11		✓
11. 6. 12		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
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11. 6. 13		✓
11. 6. 14		✓
11. 7		
<b>Defined contribution administration</b>		
11. 7. 1		✓
11. 7. 2		✓
11. 7. 3		✓
11. 7. 4		✓
11. 7. 5		✓
11. 7. 6		✓
11. 7. 7		✓
11. 7. 8		✓
11. 7. 9		✓
11. 7. 10		✓
11. 7. 11		✓
11. 7. 12		✓
11. 7. 13		✓
11. 7. 14		✓
11. 7. 15		✓
11. 8		
<b>Defined benefits fund management</b>		
11. 8. 1		✓
11. 8. 2		✓
11. 9		
<b>Defined contribution fund management</b>		
11. 9. 1		✓
11. 9. 2		✓
11. 9. 3		✓
11. 10		
<b>Benefit administration for retired employees</b>		
11. 10. 1		✓
11. 10. 2		✓
11. 10. 3		✓
11. 11		
<b>Pension administration for retired employees</b>		
11. 11. 1		✓
11. 11. 2		✓
11. 11. 3		✓
11. 11. 4		✓
11. 11. 5		✓
11. 11. 6		✓
11. 11. 7		✓

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<b>12</b>	<b>Time and attendance</b>	
<p>Time and attendance is the process of collecting and monitoring how much time an employee works on an activity or a project for payroll, cost accounting and management reporting purposes.</p>		
<b>12. 1</b>	<b>Time and attendance strategy and policies</b>	
<b>12. 1. 1</b>	✓	
<b>12. 2</b>	<b>Labor data transaction collection and approval</b>	
<b>12. 2. 1</b>	<b>Data collection</b>	
<b>12. 2. 1. 1</b>	✓	
<b>12. 2. 1. 2</b>	✓	
<b>12. 2. 2</b>	<b>Data approval</b>	
<b>12. 2. 2. 1</b>	✓	
<b>12. 2. 2. 2</b>	✓	
<b>12. 2. 2. 3</b>	✓	
<b>12. 2. 2. 4</b>	✓	
<b>12. 2. 2. 5</b>	✓	
<b>12. 2. 3</b>	<b>Ongoing support for labor transaction collection and approval</b>	
<b>12. 2. 3. 1</b>		✓
<b>12. 2. 3. 2</b>		✓
<b>12. 2. 3. 3</b>		✓
<b>12. 2. 3. 4</b>	✓	
<b>12. 2. 3. 5</b>		✓
<b>12. 2. 3. 6</b>	✓	
<b>12. 2. 3. 7</b>		✓
<b>12. 3</b>	<b>Time and attendance data processing</b>	
<b>12. 3. 1</b>	<b>Data processing</b>	
<b>12. 3. 2</b>	✓	
<b>12. 3. 3</b>	✓	
<b>12. 3. 4</b>		✓
<b>12. 4</b>	<b>Interface management</b>	
<b>12. 4. 1</b>	✓	
<b>12. 4. 2</b>		✓
<b>12. 4. 3</b>		
<b>12. 4. 4</b>		✓
<b>12. 4. 5</b>	✓	
<b>12. 5</b>	<b>Time and attendance administration</b>	

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<b>12. 5. 1</b>		✓
<b>12. 5. 2</b>		✓
<b>12. 6</b>	✓	
<b>12. 6. 1</b>	✓	
<b>12. 6. 2</b>		✓
<b>12. 7</b>		
<b>12. 7. 1</b>	✓	
<b>12. 7. 2</b>		✓
<b>12. 8</b>		
<b>12. 8. 1</b>		✓
<b>13</b>		
<p>Payroll administration encompasses all the tasks involved in paying an organization's employees and other payees. It also includes calculating taxes and social security, as well as ensuring that they are properly withheld and processed. Depending on the company in question, a full range of other deductions may be calculated, withheld, and processed as part of payroll administration.</p>		
<b>13. 1</b>		
<b>13. 1. 1</b>	✓	
<b>13. 2</b>		
<b>13. 2. 1</b>		
<b>13. 2. 1. 1</b>		✓
<b>13. 2. 1. 2</b>	✓	
<b>13. 2. 1. 3</b>		✓
<b>13. 2. 2</b>		
<b>13. 2. 2. 1</b>	✓	
<b>13. 2. 2. 2</b>		✓
<b>13. 2. 2. 3</b>	✓	
<b>13. 2. 2. 4</b>		✓
<b>13. 2. 3</b>		
<b>13. 2. 3. 1</b>	✓	
<b>13. 2. 3. 2</b>		✓
<b>13. 2. 4</b>		
<b>13. 2. 4. 1</b>	✓	
<b>13. 2. 4. 2</b>		✓
<b>13. 2. 5</b>		
<b>13. 2. 5. 1</b>		✓
<b>13. 2. 5. 2</b>	✓	
<b>13. 2. 5. 1</b>		✓

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<b>13. 3</b>	<b>Garnishment processing</b>		
<b>13. 3. 1</b>	<b>Interpret garnishment orders</b>		
<b>13. 2. 1</b>	Process new and/or garnishment orders and wage attachments received from client		✓
<b>13. 2. 2</b>	<b>Process and fund garnishment payments</b>		
<b>13. 3. 2. 1</b>	Process garnishment payments every payroll, or according to a defined frequency (e.g., end of each month) in accordance with requirements of garnishment order		✓
<b>13. 3. 2. 2</b>	Fund garnishment payments as defined in client-service provider Agreement	✓	
<b>13. 4</b>	<b>Pay processing - on-cycle</b>		
<b>13. 4. 1</b>	<b>Manage input - interfaces, automated transactions, and manual transactions</b>		
<b>13. 4. 1. 1</b>	Set up and maintain system for client payroll processing		✓
<b>13. 4. 1. 2</b>	Facilitate payroll processing by defining payroll policies, procedures, and pay rules; executing payroll production tasks in accordance with schedule; ensuring all pay data input files are transmitted to service provider in accordance with schedule; and notifying service provider of any required changes	✓	
<b>13. 4. 1. 3</b>	Perform and verify pay data updates; schedule and receive pay data inputs from client and/or client third party vendors if applicable; capture and validate required data inputs and updates from interfaces, automated transactions, and manual transactions		✓
<b>13. 4. 2</b>	<b>Audit input for quality assurance</b>		
<b>13. 4. 2. 1</b>	Audit pre- and post-payroll results		✓
<b>13. 4. 3</b>	<b>Calculate earnings</b>		
<b>13. 4. 3. 1</b>	Define earnings calculations and attributes; define accumulators and memo code set-up	✓	
<b>13. 4. 3. 2</b>	Set up and maintain all earnings, with associated calculations, including configurable options, as directed by client		✓
<b>13. 4. 3. 3</b>	Maintain earnings data for each client employee beginning as of services effective date		✓
<b>13. 4. 4</b>	<b>Calculate deductions</b>		
<b>13. 4. 4. 1</b>	Define deduction calculations	✓	
<b>13. 4. 4. 2</b>	Set up and maintain all deductions with associated calculations, including configurable options, as directed by client		✓
<b>13. 4. 5</b>	<b>Balance and reconcile output</b>		
<b>13. 4. 5. 1</b>	Balance and reconcile payroll process components (e.g., reports, imports, accounts)		✓
<b>13. 4. 6</b>	<b>Manage output - posting to self service; file transmissions</b>		
<b>13. 4. 6. 1</b>	Post payroll data to self service		✓
<b>13. 4. 6. 2</b>	Manage distribution of files to client and client third party vendors		✓
<b>13. 4. 7</b>	<b>Fund payroll</b>		
<b>13. 4. 7. 1</b>	Fund payroll as directed by service provider	✓	
<b>13. 5</b>	<b>Pay processing - off-cycle</b>		
<b>13. 5. 1</b>	<b>Process special payments</b>		
<b>13. 5. 1. 1</b>	Notify service provider of upcoming special payments to client employees and provide direction for taxation of such payments; coordinate processing, including submission of data in required format	✓	
<b>13. 5. 1. 2</b>	Process special payments submitted in standard format by client		✓

## HROA Service Taxonomy

Services			Client Responsibility	Provider Responsibility
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13. 5.	1.	3		✓
13. 5.	2.			
<b>Process relocation payments</b>				
13. 5.	2.	1	✓	
13. 5.	2.	2		✓
13. 5.	2.	3		✓
13. 5.	3.			
<b>Process stock option exercise payments</b>				
13. 5.	3.	1	✓	
13. 5.	3.	2		✓
13. 5.	3.	3		✓
13. 5.	3.	4		✓
13. 5.	4.			
<b>Process incentive plan payments</b>				
13. 5.	4.	1	✓	
13. 5.	4.	2		✓
13. 5.	4.	3		✓
13. 5.	4.	4		✓
13. 5.	4.	5	✓	
13. 5.	5.			
<b>Process miscellaneous supplemental payments (e.g., gift cards and spot bonuses)</b>				
13. 5.	5.	1	✓	
13. 5.	5.	2	✓	
13. 5.	5.	3		✓
13. 5.	6.			
<b>Process prior period adjustments</b>				
13. 5.	6.	1		✓
13. 5.	7.			
<b>Process retroactive payments</b>				
13. 5.	7.	1	✓	
13. 5.	7.	2		✓
13. 5.	8.			
<b>Process prorated payments</b>				
13. 5.	8.	1	✓	
13. 5.	8.	2		✓
13. 5.	9.			
<b>Process retroactive benefit deductions</b>				
13. 5.	9.	1		✓
13. 5.	9.	2		✓
13. 5.	10.			
<b>Process payment reversals</b>				
13. 5.	10.	1	✓	

## HROA Service Taxonomy

Services			Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>				
13. 5.	10. 2	Notify client of any error that requires reversal of payment(s); reverse payment(s), update payroll system, and send manual check as required		✓
13. 5.	11	<b>Process direct deposit reversals</b>		
13. 5.	11. 1	Notify service provider of any error that requires reversal of direct deposit(s)	✓	
13. 5.	11. 2	Notify client of any error that requires reversal of direct deposit(s); reverse direct deposit(s) in accordance with ACH rules, verify funds are returned to the appropriate account, and notify client employee of reversal		✓
13. 5.	12	<b>Process check stop payments</b>		
13. 5.	12. 1	Receive check stop payment request from client or client employee		✓
13. 5.	12. 2	Verify check status with bank		✓
13. 5.	12. 3	Notify client and client employee that stop payment activity is discontinued in the event check is already cashed or if service provider is unable to verify check status, or request bank to stop payment if check in the event service provider is able to verify check is not yet cashed		✓
13. 5.	12. 4	Verify funds are returned to the appropriate account and notify client employee of stop payment		✓
13. 5.	12. 5	Reverse payment(s), update payroll system, and issue payment with next on-cycle, off-cycle, or manual pay process as requested by client		✓
13. 5.	13	<b>Process deceased employee payments</b>		
13. 5.	13. 1	Notify service provider of employee death, provide estate contact information, and take appropriate action to allow service provider to calculate employee final pay inclusive of all pay elements (i.e., regular, overtime, paid time off, etc.)	✓	
13. 5.	13. 2	Calculate wages and any additional payment due		✓
13. 5.	13. 3	Designate payee for any payments due	✓	
13. 5.	13. 4	Process payments due payable to entity designated by client; send payments to client or as otherwise directed by client		✓
13. 5.	13. 5	Forward payments to state or estate, as appropriate based on state legislation	✓	
13. 6		<b>Banking transaction management</b>		
13. 6.	1	<b>Determine and transmit credits and debits (impounds)</b>		
13. 6.	1. 1	Upon completion of payroll processing, transmit check amounts and transmit direct deposit/paycard credits and debits (impounds)		✓
13. 6.	1. 2	Receive and process direct deposit credits and impounds; send items belonging to other banks directly to Automated Clearing House		
13. 6.	2	<b>Fund payment obligations</b>		
13. 6.	2. 1	Process paycard credits; transmit credits and debits (impounds) to client employee banks; provide client with funding amounts and timeframe requirements		✓
13. 6.	2. 2	Process funding obligation; fund account from which reverse wire is drawn as defined in the Agreement	✓	
13. 6.	2. 3	Initiate reverse wire for funding following each payroll processing cycle; print and distribute paychecks to client; credit client employee accounts via direct deposit; credit client employee paycard accounts		✓
13. 6.	3	<b>Process check stop payments and voids</b>		
13. 6.	3. 1	Notify service provider of individual checks or range of checks for stop payment or void	✓	
13. 6.	3. 2	Initiate check stop payment and check void banking transactions requested by client		✓
13. 6.	3. 3	Pay any required stop payment / check void charges	✓	
13. 6.	4	<b>Process direct deposit / pay card reversals and deletions</b>		
13. 6.	4. 1	Notify service provider of direct deposit / paycard items to be reversed or deleted	✓	
13. 6.	4. 2	Initiate direct deposit / paycard reversal and deletion banking transactions requested by client		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
13. 6. 4. 3	✓	
13. 6. 5		
<b>Manage uncashed items</b>		
13. 6. 5. 1		✓
13. 6. 5. 2		✓
13. 6. 5. 3	✓	
13. 6. 5. 4	✓	
13. 7		
<b>Tax authority management</b>		
13. 7. 1		
<b>Authorize service provider to perform services</b>		
13. 7. 1. 1	✓	
13. 7. 2		
<b>Provide agency support</b>		
13. 7. 2. 1		✓
13. 7. 3		
<b>Assist with agency audits</b>		
13. 7. 3. 1		✓
13. 7. 3. 2		✓
13. 8		
<b>Tax filing and funding</b>		
13. 8. 1		
<b>Calculate tax liabilities</b>		
13. 8. 1. 1		✓
13. 8. 1. 2		✓
13. 8. 1.		
<b>Manage agency filings</b>		
13. 8. 1. 1		✓
13. 8. 1. 2	✓	
13. 8. 1. 3		✓
13. 8. 1. 4	✓	
13. 8. 1. 5	✓	
13. 8. 1. 6		✓
13. 8. 2		
<b>Assist with agency tracer activities</b>		
13. 8. 2. 1		✓
13. 8. 3		
<b>Fund tax liabilities</b>		
13. 8. 3. 1		✓
13. 8. 3. 2	✓	

## HROA Service Taxonomy

Services				Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>					
13. 8.	3.	3	Initiate reverse wire for funding following each payroll processing cycle		✓
13. 9	<b>Payroll accounting</b>				
13. 9.	1	<b>Host and provide access to data</b>			
13. 9.	1.	1	Host and provide client access to general ledger data for reporting purposes		✓
13. 9.	1.	2	Push payroll data to general ledger for each processing cycle as outlined on payroll production schedule		✓
13. 9.	1.	3	Access general ledger data; produce journal entry file, maintain chart of accounts along with associated mapping activities, and coordinate transmission of general ledger extract to client financial accounting system	✓	
13. 9.	2	<b>Payroll and tax compliance</b>			
13. 9.	2.	1	Monitor and update rules; ensure system compliance		✓
13. 9.	2.	2	Maintain withholding rules, define employee eligibility, process W-4s, edit and verify federal and state tax elections, and update payroll system with federal and state tax changes submitted to service provider		✓
13. 9.	3	<b>Distribution</b>			
13. 9.	3.	1	Maintain distribution schedule and requirements	✓	
13. 9.	3.	2	Establish and maintain paycheck distribution schedule and requirements	✓	
13. 9.	4	<b>Produce hard copy checks, statements, forms</b>			
13. 9.	4.	1	Produce pay stubs including data fields as specified by client		✓
13. 9.	4.	2	Notify service provider of any changes to standard pay stub requirements as defined during Implementation in accordance with the established time requirements	✓	
13. 9.	5	<b>Produce electronic checks, statements, forms</b>			
13. 9.	5.	1	Produce online pay statements and W-2 Forms including data fields as specified by client		✓
13. 9.	5.	2	Respond to inquiries related to online pay statements and W-2 Forms		✓
13. 9.	6	<b>Retain statement history</b>			
13. 9.	6.	1	Post both current and historical service provider-generated (up to three (3) years back) pay statements and W-2 Forms online		✓
13. 10	<b>Quarter-end processing</b>				
13. 10.	1	<b>Update and maintain processing calendar</b>			
13. 10.	1.	1	Provide payroll and holiday processing schedule updates to service provider	✓	
13. 10..	1.	2	Update and maintain payroll and holiday processing schedules		✓
13. 10...	1.	3	Create quarter-end checklist and schedule		✓
13.	1.	4	Review and approve quarter-end checklist and schedule	✓	
13. 10.	2	<b>Verify, balance, and reconcile input and process quarter-end data</b>			
13. 10.	2.	1	Provide quarter-end processing data to service provider	✓	
13. 10..	2.	2	Send file to Social Security Administration to confirm accuracy of social security numbers		✓
13. 10...	2.	3	Balance and reconcile wage and tax data		✓
13. 10.	2.	4	Process quarter-end payroll data, and provide data to client		✓
13. 10.	2.	5	Capture all manual changes, voids, and adjustments for the final quarter of the payroll year		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
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13. 10. 2. 6	✓	
<b>13. 11</b>		
<b>Year end processing</b>		
<b>13. 11. 1</b>		
<b>Update and maintain processing calendar</b>		
13. 11. 1. 1	✓	
13. 10. 1. 2		✓
13. 10. 1. 3		✓
13. 11. 1. 4	✓	
<b>13. 11. 2</b>		
<b>Verify, balance, and reconcile input and process year-end data</b>		
13. 11. 2. 1	✓	
13. 10. 2. 2		✓
13. 10. 2. 3		✓
13. 11. 2. 4		✓
13. 11. 2. 5	✓	
<b>13. 11. 2</b>		
<b>Produce and distribute forms</b>		
13. 11. 2. 1		✓
<b>13. 12</b>		
<b>Expatriate Payroll</b>		
<b>13. 12. 1</b>		
<b>Process expatriate payments</b>		
13. 12. 1. 1	✓	
13. 11. 1. 2		✓
13. 11. 1. 3		✓
13. 12. 1. 4		✓
13. 12. 1. 5	✓	
13. 12. 1. 6		✓
<b>14</b>		
<b>Service delivery</b>		
Service Delivery is the overall management of the End to End HR services supported by in-house service teams, providers, systems and tools.		
<b>14. 1</b>		
<b>Service delivery strategy and policies</b>		
14. 1. 1	✓	
14. 1. 2	✓	
14. 1.	✓	
14. 1. 3		✓
14. 1. 4		✓
14. 1. 5	✓	

# HROA Service Taxonomy

**Services**

**Client  
Responsibility**

**Provider  
Responsibility**

The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.

**15 Service Center Management**

Service Center Management is the set of activities and management processes associated with the delivery of HR services from a provider HR services center.

- 15. 1 Service center management strategy and policies**
- 15. 1. 1 Define and implement case management escalation policy ✓
- 15. 1. 2 Define and implement problem resolution policy, including severity levels, key contacts and escalation procedures ✓
- 15. 1. 3 Manage Policy and Procedure documentation**
- 15. 1. 3. 1 Manage all operational, policy, process, procedure and technical documentation ✓
- 15. 1. 3. 2 Review and administer subsequent changes to policy, process, procedure and technical documentation ✓
- 15. 1. 3. 3 Conduct assessments to ensure operations documentation adheres to defined operational procedures and standards ✓
- 15. 1. 3. 4 Administer updates and changes to service center documentation and procedures, communicating changes in line with specified procedures ✓
- 15. 1. 3. 5 Maintain catalogue of documentation, covering service provision, technical, procedural, operational and other documentation ✓
- 15. 1. 4 Service Monitoring and tracking**
- 15. 1. 4. 1 Monitor performance against SLA's ✓
- 15. 1. 4. 2 Services and processes follow a recognized a defined methodology (e.g. Six Sigma, Lean, other quality processes) ✓
- 15. 1. 4. 3 Provide individual call recordings, quality monitoring results and transcriptions, upon request ✓
- 15. 1. 4. 4 Report quality monitoring and evaluation results ✓
- 15. 9 Manage service center workforce**
- 15. 9. 5. 1 Provide, develop and train service centre workforce on client policies, procedures, escalation and compliance processes ✓
- 15. 9. 5. 2 Manage employee turnover to ensure service levels are unaffected. ✓
- 15. 9. 5. 3 Provide career management and career progression for service center personnel ✓
- 15. 2 Enquiry Management**
- Provide and maintain sufficient policy detail, documentation, and guidelines to support employee and manager Self Service inquiries to be addressed by the service provider. ✓
- 15. 2. 1 Provide advice and guidance on policies, procedures and self-service navigation for each service, channel and customer group and language in scope. Channels are typically self-service, IVR, phone, e-mail, fax, chat and Web. Customer groups can be employees, managers, HR business partners or 3rd parties ✓
- 15. 2. 2 Research, resolve, and close all work in progress requests
- 15. 2. 3 Escalate cases to Tier 2/3 according to call/case prioritization provided by the client ✓
- 15. 2. 4 Create a record in the Contact and Case Management System for each Contact with Tier 1 and the reason for and results of the Contact ✓
- 15. 2. 5 Provide Tier 3 subject matter experts to manage Tier 3 cases in accordance with the committed resolution times as defined in the Policy and Procedures Manual ✓
- 15. 2. 6 Communicate resolution and document resolution of Tier 3 cases in the Case Management system ✓
- 15. 2. 7 Provide one Tier 3 subject matter expert per process area who is responsible for ensuring the completeness, accuracy and ongoing enhancement of the policy and procedure content for their process area ✓
- 15. 2. 8 Designate a shared services focal for Contact Center Services to whom provider communications may be addressed in connection with any issues that arise which impact the Enquiry Services ✓
- 15. 2. 9 Communicate to provider contact information for client Tier 3 support specialists and other contacts required for provider to deliver the Services ✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
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15. 2. 10		✓
15. 2. 11		✓
<b>15. 3</b>		
<b>Issue Management</b>		
15. 3. 1		✓
15. 3. 2		✓
15. 3. 3		✓
15. 3. 4		✓
15. 3. 5		✓
15. 3. 6		✓
15. 3. 7		✓
15. 3. 8		✓
15. 3. 9		✓
15. 3. 10		✓
15. 3. 11		✓
15. 3. 12		✓
15. 3. 13		✓
<b>15. 3</b>		
<b>Document and archive management</b>		
15. 3. 1		✓
15. 3. 2		✓
15. 3. 3		✓
15. 3. 4		✓
<b>15. 4</b>		
<b>Knowledge management</b>		
15. 4. 1		✓
15. 4. 2		✓
15. 4. 3		✓
<b>15. 5</b>		
<b>Process documentation management</b>		
15. 5. 1		✓
15. 5. 2		✓
15. 5. 3		✓
15. 5. 4		✓
15. 5. 5		✓
<b>15. 6</b>		
<b>Data quality and integrity</b>		
15. 6. 1		✓
15. 6. 2		✓
15. 6. 3		✓
<b>15. 7</b>		
<b>Contact Center Infrastructure management</b>		
15. 7. 1		✓
15. 7. 2		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
15. 7. 3		✓
15. 7. 4		
<b>Telephony</b>		
15. 7. 4.	✓	
15. 7. 4. 1	✓	
15. 7. 4. 2		✓
15. 7. 4. 3		✓
<b>Call and Case</b>		
15. 7. 5. 1	✓	
15. 7. 5. 2		✓
15. 7. 5. 3	✓	
15. 7. 5. 4		✓
<b>IVR</b>		
15. 7. 6. 1		✓
15. 7. 6. 2		✓
15. 7. 6. 3	✓	
15. 7. 6. 4		✓
15. 7. 6. 5	✓	
15. 7. 6. 6		✓
15. 7. 6. 7	✓	
15. 7. 6. 8		✓
<b>Technical Problem/Incident Management Services</b>		
15. 7. 7. 1	✓	
15. 7. 7. 2		✓
<b>System Access Management Services</b>		
15. 7. 8. 1	✓	
15. 7. 8.. 2		✓
<b>Reporting services</b>		
15. 8. 1	✓	
15. 8. 2		✓
15. 8. 3		✓
15. 8. 4		✓

**15 HR information technology**

HRIT is the foundational technology component of HR administration. While the definition may vary in some circumstances, it may refer to the underlying human resources information system such as PeopleSoft or SAP. Alternatively, some organizations refer to HRIT as the information technology components resident in each process domain such as payroll, recruiting, or compensation.

**15. 1 HR IT strategy and policies**

## HROA Service Taxonomy

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<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
15. 1. 1		
15. 1. 2	✓	
15. 1. 3		✓
15. 1. 4		✓
15. 1. 5		✓
15. 1. 6		✓
15. 1. 7		✓
15. 2		
<b>Database Management</b>		
15. 2. 1		✓
15. 2. 2		✓
15. 2. 3		✓
15. 2. 4		✓
15. 3		
<b>Database Administration</b>		
15. 3. 1		✓
15. 3. 2		✓
15. 3. 3		✓
15. 3. 4		✓
15. 4		
<b>Historical data maintenance</b>		
15. 4. 1	✓	
15. 4. 2	✓	
15. 4. 3		✓
15. 5		
<b>HRIS maintenance</b>		
15. 5. 1		✓
15. 5. 2		✓
15. 5. 3		✓
15. 5. 4		✓
15. 5. 5		✓
15. 5. 6		✓
15. 5. 7		✓
15. 5. 8		✓
15. 5. 9		✓
15. 5. 10	✓	
15. 5. 11		✓
15. 5. 12		✓
15. 5. 13		✓
15. 5. 14		✓
15. 5. 15		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
15. 5. 16		✓
15. 5. 17		
15. 5. 18		✓
15. 6		
<b>Interface management</b>		
15. 6. 1		✓
15. 6. 2		✓
15. 6. 3		✓
15. 7		
<b>Application and network security</b>		
15. 7. 1	✓	
15. 7. 2		✓
15. 7. 3		✓
15. 7. 4		✓
15. 7. 5		✓
15. 7. 6		
15. 7. 7		✓
15. 7. 8		✓
15. 7. 9		✓
15. 7. 10		✓
15. 7. 11		
15. 7. 12		✓
15. 7. 13		✓
15. 7. 14		✓
15. 7. 15		✓
15. 7. 16		✓
15. 7. 17		
15. 7. 18		✓
15. 7. 19		✓
15. 7. 20		✓
15. 7. 21		✓
15. 8		
<b>Security administration</b>		
15. 8. 1	✓	
15. 8. 2		✓
15. 8. 3		✓
15. 8. 4		✓
15. 8. 5		✓
15. 8. 6		✓
15. 8. 7		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
<b>15. 9</b>		
<b>15. 9. 1</b>		
<b>15. 9. 2</b>		✓
<b>15. 9. 3</b>		
<b>15. 9. 4</b>		✓
<b>15. 9. 5</b>		✓
<b>15. 9. 6</b>		✓
<b>15. 9. 7</b>		✓
<b>15. 9. 8</b>		✓
<b>15. 9. 9</b>		
<b>15. 9. 10</b>		✓
<b>15. 9. 11</b>		✓
<b>15. 9. 12</b>		✓
<b>15. 9. 13</b>		✓
<b>15. 9. 14</b>		✓
<b>15. 9. 15</b>		✓
<b>15. 9. 16</b>		✓
<b>15. 9. 17</b>		✓
<b>15. 9. 18</b>		✓
<b>15. 9. 19</b>		
<b>15. 9. 20</b>		✓
<b>15. 9. 21</b>		✓
<b>15. 9. 22</b>		✓
<b>15. 10</b>		
<b>15. 10. 1</b>		
<b>15. 10. 2</b>		✓
<b>15. 10. 3</b>		✓
<b>15. 10. 4</b>		✓
<b>15. 10. 5</b>		✓
<b>15. 10. 6</b>		✓
<b>15. 10. 7</b>	✓	
<b>15. 10. 8</b>		✓
<b>15. 10. 9</b>	✓	
<b>15. 10. 10</b>		
<b>15. 10. 11</b>		✓
<b>15. 10. 12</b>		
<b>15. 10. 13</b>		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
15. 10. 14		✓
15. 10. 15		✓
15. 10. 16		✓
15. 10. 17		✓
15. 10. 18	✓	
15. 10. 19		✓
15. 10. 20		✓
15. 10. 21		✓
15. 10. 22		✓
15. 10. 23	✓	
15. 10. 24		
15. 10. 25		✓
15. 10. 26		✓
15. 10. 27		✓
15. 11		
15. 11. 1	✓	
15. 11. 2		✓
15. 11. 3		✓
15. 12		
15. 12. 1		✓
15. 12. 2		✓
15. 12. 3		✓
15. 13		
15. 13. 1	✓	
15. 13. 2		✓
<b>16</b>	<b>HR reporting and analytics</b>	
<p>HR reporting and analytics helps clients establish and communicate data and HR related information to managers, employees and HR business partners. The scope and nature of reporting will vary with scope; however, the overall intent is to provide actionable information that is valuable to the client organization.</p>		
16. 1		
16. 1. 1	✓	
16. 1. 2	✓	
16. 1. 3	✓	
16. 1. 4	✓	
16. 1. 5	✓	
16. 1. 6	✓	✓
16. 2		

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
16. 2. 1	✓	✓
16. 2. 2	✓	
16. 2. 3	✓	
16. 2. 4	✓	
16. 2. 5	✓	
16. 2. 6	✓	
16. 2. 7	✓	
16. 3	<b>Reporting and Analytics Project Services</b>	
16. 3. 1	✓	
16. 3. 2		✓
16. 3. 3		✓
16. 3. 4		✓
16. 3. 5		✓
16. 3. 6		✓
16. 3. 7		✓
16. 3. 8		✓
16. 3. 9		✓
16. 3. 10		✓
16. 3. 11		✓
16. 3. 12		✓
16. 3. 13		✓
16. 3. 14		✓
16. 3. 15	✓	
16. 4	<b>Reporting Support Services</b>	
16. 4. 1	✓	
16. 4. 2		✓
16. 5		✓
16. 5 1		✓
16. 5 2		✓
16. 5 3		✓
16. 5 4		✓
16. 5 5		✓
16. 5 6		✓
16. 5 7		✓
16. 5 8		✓
16. 5 9		✓
16. 5 10		✓

## HROA Service Taxonomy

Services	Client Responsibility	Provider Responsibility
<p>The services catalogue is a high level representation of Human Resources services activity. It is expected that the provider and the buyer will work together to refine the description of actual activities to be outsourced or retained.</p>		
16. 5 11		✓
<b>17</b>	<b>Leave and absence management</b>	
<p>Absence management involves the management of all lost work time, whether disability or nondisability related. Absence management programs, which combine benefit administration and programs, can include workers' compensation, short- and long-term disability, family and medical leave administration and health care administration and wellness programs.</p>		
<b>17. 1</b>	<b>Leave and absence strategy and policies</b>	
17. 1. 1		✓
17. 1. 2	✓	
<b>17. 2</b>	<b>Leave management</b>	
17. 2. 1		✓
17. 2. 2		✓
17. 2. 3		✓
17. 2. 4		✓
17. 2. 5		✓
17. 2. 6		✓
17. 2. 7		✓
17. 2. 8		✓
17. 2. 9		✓
<b>17. 3</b>	<b>Absence management</b>	
17. 3. 1	✓	
17. 3. 2		✓
17. 3. 3		✓
17. 3. 4		✓
17. 3. 5		✓