Affirmative Action and Demographic Data Guide

Use this guide to assist with coding affirmative action and demographic related fields on the Personal Data (0002) and Additional Personal Data (0077) infotypes. This information is gathered on the Employee Affirmative Action and Demographic Data form or similar agency employee questionnaire. Several fields are also available for employees to view and update in MyPortal.

This data is used in state and federal reports about equal opportunity and affirmative action efforts for the state workforce, and to help make better decisions to ensure fair representation and make our workforce more diverse and inclusive.

Personal Data (0002)

The following demographic data is maintained on the Personal Data (0002) infotype in HRMS:

- Gender Designation for Health Ins
- Gender Identity

Additional Personal Data (0077)

The following is maintained on the Additional Personal Data (0077) infotype in HRMS:

- Ethnicity, Race, and Ethnic Origin
- Military Status
- EEO Exemption Status
- Veteran Status
- Disability
- LGBTQ+
- Military Spouse
- PSLF

Additional Resources:

[Employee Affirmative Action and Demographic Data form](#)

[HRMS Data Definitions Resource Guide](#)

[HRMS Support Hub](#)

[Washington Workforce Analytics](#)

[Diversity, Equity and Inclusion Information](#)

[Affirmative Action Laws & Rules](#)

[Public Service Loan Forgiveness Program](#)

Personal Data

Personal Data (0002)

The following demographic data is maintained on the Personal Data (0002) infotype in HRMS:

- Gender Designation for Health Ins
- Gender Identity

This information is gathered on the Employee Affirmative Action and Demographic Data form or similar agency employee questionnaire and is used in state and federal reporting. Employees can view and update this information in MyPortal.

Note: This guide does not cover the remaining fields on this infotype. Refer to the New Hire Action (PA) – Create New Hire or Personal Data user procedures on the HRMS Support Hub for tips on completing those fields.

Gender Designation for Health Ins

Employee gender designation for health insurance purposes is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire). Employees can view and update this field in MyPortal.

This data is used to meet current requirements for Medicare federal reporting and eligibility determinations, meet health plan vendor requirements, ensure coordination of benefits and efficient claims processing. This field shall not be used by state agencies for any workforce planning or reporting purposes.
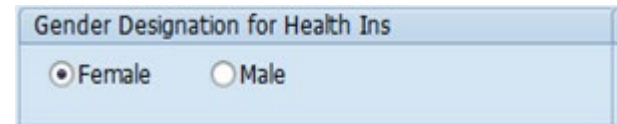
- Enter the employee's gender designation for health insurance purposes into HRMS by selecting the appropriate Gender Designation for Health Ins radio button based on the employee's selection on the employee data form.

- The available selections for this field are Female or Male; and the system will default to Female. Keep the system default value if the employee chooses not to disclose this information.

Sample selection on the Employee Affirmative Action and Demographic Data form.

This example corresponds with the selections on the sample employee data form above.
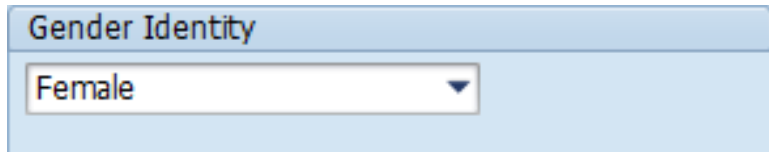
Gender Identity

Gender identity data is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire) to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update this field in MyPortal.

- Enter the employee's gender identity into HRMS by selecting the appropriate option in the Gender Identity drop down menu based on the employee's selection on the employee data form.

- This field will default to Unspecified. If the employee has not yet completed an Employee Affirmative Action and Demographic Data form (or other agency questionnaire) or did not provide a gender identity, select Unspecified in the Gender Identity field in HRMS.

Sample Gender Identity selection on the Employee Affirmative Action and Demographic Data form.

This example corresponds with the selections on the sample employee data form above.

Additional Personal Data

Additional Personal Data (0077)

The following is maintained on the Additional Personal Data (0077) infotype in HRMS:

- Ethnicity, Race, and Ethnic Origin

- Military Status

- EEO Exemption Status

- Veteran Status

- Disability

- LGBTQ+

- Military Spouse

- PSLF

Most of this information is gathered on the Employee Affirmative Action and Demographic Data form or similar agency employee questionnaire and is used for affirmative action and workforce diversity reporting. Employees can view and update several of these fields in MyPortal.

PSLF Status and Date are collected through the PSLF process, either when an employee requests employment certification or submits an opt-out form.

The start date of this infotype should be the start date of the appointment or the actual effective date of the change.

Ethnicity, Race, Ethnic Origin

Ethnicity and race data is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire) to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update these fields in MyPortal.

9. What race and/or ethnicity do you consider yourself? Select all that apply.

☒ American Indian or Alaska Native   ☒ Hispanic or Latino   ☐ Asian
☐ Native Hawaiian or Other Pacific Islander   ☒ Black or African-American   ☐ White

Sample Race/Ethnicity options on the Employee Affirmative Action and Demographic Data form.

Ethnicity(New)

- If "**Hispanic or Latino**" is selected on the employee data form, enter Hispanic/Latino into the Ethnicity field in HRMS.

Additional Personal Data	
Ethnic origin	
Ethnicity(New)	Hispanic/Latino

  This example corresponds with the selections on the sample employee data form above.

- If "**Hispanic or Latino**" is *not* selected on the employee data form, enter Not Hispanic/Latino into the Ethnicity field in HRMS.

Additional Personal Data	
Ethnic origin	
Ethnicity(New)	Not Hispanic/Latino

Note: When Ethnic Origin and Ethnicity fields are both populated, HRMS will display a warning message "Ethnicity(New) field maintained thus Ethnic origin field is disregarded". This message is referring to the Ethnic Origin field being disregarded on the EEO-4 report. If the Ethnicity is set to Not Hispanic/Latino, then one or more Race check boxes must be selected or the employee will not be counted in the male/female by race columns on the EEO-4 report.
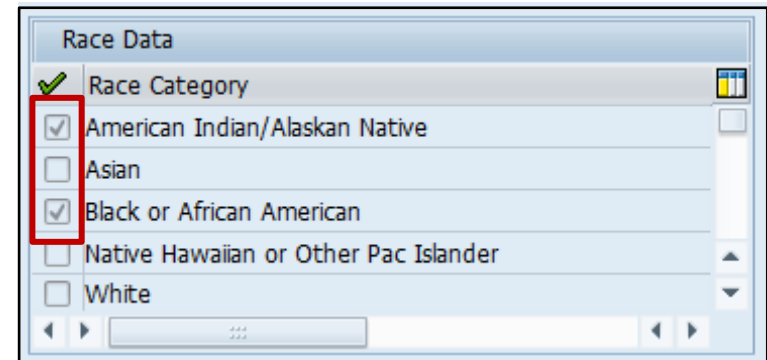
9. What race and/or ethnicity do you consider yourself? Select <u>all</u> that apply.

☒ American Indian or Alaska Native ☒ Hispanic or Latino ☐ Asian
☐ Native Hawaiian or Other Pacific Islander ☒ Black or African-American ☐ White

Sample Race/Ethnicity options on the Employee Affirmative Action and Demographic Data form.

Race Data

- Enter all race categories selected on the employee data form into HRMS by checking the corresponding boxes.

- If the employee's Ethnicity is set to Not Hispanic/Latino, it is important that one or more races are selected or the employee will not be counted on the EEO-4 report.

- If multiple races are selected, the system will prompt you to also check the Two or More Races box. Do not check Two or More Races by itself.

Ethnicity, Race, Ethnic Origin, cont...

Ethnic Origin

- Use the Ethnic Origin Crosswalk below to determine the appropriate Ethnic Origin selection in HRMS.

    In the example to the right, Ethnic Origin was set to Hispanic/Latino even though multiple races were selected. This is because the crosswalk indicates Hispanic/Latino always overrides any race combination.

Ethnic Origin Crosswalk

If **Ethnicity** is:	and **Race** is:	then **Ethnic Origin** should be:
Hispanic/Latino	(blank)	Hispanic
Hispanic/Latino	American Indian/Alaska Native	Hispanic
Hispanic/Latino	Asian	Hispanic
Hispanic/Latino	Black or African American	Hispanic
Hispanic/Latino	Native Hawaiian or Other Pac Islander	Hispanic
Hispanic/Latino	White	Hispanic
Hispanic/Latino	any race combination	Hispanic
Not Hispanic/Latino	(blank)	White/Not Hispanic origin
Not Hispanic/Latino	American Indian/Alaska Native	American Indian/Alaskan
Not Hispanic/Latino	American Indian/Alaska Native + any other race	American Indian/Alaskan
Not Hispanic/Latino	Asian	Asian or Pacific Islander
Not Hispanic/Latino	Asian + Native Hawaiian or Other Pac Islander or White	Asian or Pacific Islander
Not Hispanic/Latino	Black or African American	Black/Not Hispanic origin
Not Hispanic/Latino	Black or African American + Asian, Native Hawaiian or Other Pac Islander, or White	Black/Not Hispanic origin
Not Hispanic/Latino	Native Hawaiian or Other Pac Islander	Asian or Pacific Islander
Not Hispanic/Latino	Native Hawaiian or Other Pac Islander + White	Asian or Pacific Islander
Not Hispanic/Latino	White	White/Not Hispanic origin

Note: When Ethnic Origin and Ethnicity fields are both populated, HRMS will display a warning message "Ethnicity(New) field maintained thus Ethnic origin field is disregarded". This message is referring to the Ethnic Origin field being disregarded on the EEO-4 report. If the Ethnicity is set to Not Hispanic/Latino, then one or more Race check boxes must be selected or the employee will not be counted in the male/female by race columns on the EEO-4 report.

Military Status

Military Status is collected to help determine an employee's eligibility for veteran's preference in a layoff. Prior to granting any veteran's preference, review the employee's DD Form 214 or alternate verification of military service and confirm they meet the requirements of the rule. This information is collected and confirmed prior to a layoff and not typically used in enterprise reporting. Employees can view this field in MyPortal, but are instructed to contact their HR Office if it is incorrect.

- Enter the military status provided by the employee into HRMS by selecting the corresponding option in the Military Status drop down menu.

Notes:
Selecting an option under Military status will trigger completion of the Military Service (0081) infotype. Refer to the Military Service - Create New Record and Military Service - Change Existing Record procedures for creating and correcting that infotype.

The following Military Status selections are no longer used: Rtrd Dis Vet > $500, Rtrd Dis VtnmVet > $500, Rtrd VtnmVet > $500, Sep/Rtrd Dis VtnmVet<$500, and Sep/Rtrd VtnmVet < $500.

The Seniority w Military (29) date type is available in HRMS to track military service that has been verified and meets layoff preference requirements.

EEO Exemption Status

- Check the "Exempt from EEO" box in HRMS if an employee is exempt from federal Equal Employment Opportunity (EEO) reporting.

- During a rehire or appointment change action, be sure to review the employee's EEO Exemption status and update when necessary.

Notes: The EEO Exemption only applies to federal reports to the Equal Employment Opportunity Commission. Affirmative Action reports within the state of Washington include all employees – including those marked Exempt from EEO in HRMS.

The Equal Employment Opportunity Act of 1972, section 701(f) provides the definition of employees exempt from EEO reporting:

(f) The term "employee" means an individual employed by an employer, except that the term "employee" shall not include any person elected to public office in any State or political subdivision of any State by the qualified voters thereof, or any person chosen by such officer to be on such officer's personal staff, or an appointee on the policy making level or an immediate adviser with respect to the exercise of the constitutional or legal powers of the office. The exemption set forth in the preceding sentence shall not include employees subject to the civil service laws of a State government, governmental agency or political subdivision.

Veteran Status

Veteran data is collected from the employee to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update this information in MyPortal.

- Use the Veteran Status Crosswalk below to determine the appropriate Veteran Status selections in HRMS based on the employee's selections on the employee data form.

10. Veteran Status? Select all that apply.

Are you an Eligible Veteran?	Yes ☒	No ☐	If yes, discharge date: 08/31/1981
Are you a Vietnam Era Veteran?	Yes ☐	No ☒	Type of discharge: Honorable
Are you a Veteran w/service-connected disability?	Yes ☐	No ☒	
Are you a Special Disabled Veteran?	Yes ☐	No ☒	

Sample Veteran Status options on the Employee Affirmative Action and Demographic Data form.

Veteran Status Crosswalk

Question	Response	HRMS Veteran Status Selection
Are you an Eligible Veteran?	Yes	Other Protected Veteran (and enter Discharge Date)
	No	Non Veteran
	Blank	Prefers Not to Answer
Are you a Vietnam Era Veteran?	Yes	Vietnam-era Veteran Other Protected Veteran
	No or Blank	No selection
Are you a Veteran w/service-connected disability?	Yes	Disabled Veteran Other Protected Veteran
	No or Blank	No selection
Are you a Special Disabled Veteran?	Yes	Special Disabled Veteran Other Protected Veteran
	No or Blank	No selection

Veteran Status

Discharge Date 08/31/1981
- ◉ Protected Veterans
  - ☐ Special Disabled Veteran
  - ☐ Vietnam Era Veteran
  - ☑ Other Protected Veteran
  - ☐ Recently Separated Veteran
  - ☐ Armed Forces Service Medal Veteran
  - ☐ Disabled Veteran
- ○ Not a Protected Veteran
- ○ Prefers Not to Answer
- ○ Non Veteran

Note: The following Veteran Status options are no longer used: Recently Separated Veteran, Armed Forces Service Medal Veteran, Not a Protected Veteran.

Disability

Disability data is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire) to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update this information in MyPortal.

Disability information is often disclosed through other HR related processes; however, the employee must authorize any changes to their disability status for affirmative action purposes.

- Use the Disability Status Crosswalk below to determine the appropriate Disability Status selection in HRMS based on the employee's selection on the employee data form.

7. Are you a person with a disability?

Veterans with a service-connected disability may also meet the definition of a person with a disability. Select both if applicable.

Yes ☒   No ☐

Sample Disability Status on the Employee Affirmative Action and Demographic Data form.

Disability Status Crosswalk

Question	Response	HRMS Disability Status Selection
Are you a person with a disability?	Yes	Has a disability (or previously had one)* (enter Disability Date and Date Learned)
	No	Does not have a disability
	Blank	Not informed/unknown

*Do not include those who *previously* had a disability since they no longer meet the definition. Use Does not have a disability instead.

Disability

Status	Has a disability (or pre... ▼
Disability Date	01/15/2020
Date Learned	01/15/2020

This example corresponds with the selections on the sample employee data form above. Disability Date and Date Learned are the date the employee signed the form.

Notes:
The Disability Date is not used by the state of Washington; however HRMS requires an entry if the Disability Status is set to Has a Disability (X). If you know the employee's disability date, enter that date; otherwise, enter the date you learned of the disability (same date as the Date Learned field).

Medical documentation is not required to confirm a disability for affirmative action purposes - the employee's attestation of the disability is sufficient. Data for persons with disabilities comes solely from the Disability check box and does not consider the Special Disabled Veteran box.

LGBTQ+

LGBTQ+ identity data is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire) to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update this field in MyPortal.

- Enter the employee's LGBTQ+ identity into HRMS by selecting the appropriate option in the LGBTQ+ drop down menu based on the employee's selection on the employee data form.

- This field will default to Unspecified. If the employee has not yet completed an Employee Affirmative Action and Demographic Data form (or other agency questionnaire) or did not answer the LGBTQ+ question, select Unspecified in the LGBTQ+ field in HRMS.

8. Do you identify as LGBTQ+?
Information used to account for workforce representation.

Yes ☒   No ☐

Sample LGBTQ+ status on the Employee Affirmative Action and Demographic Data form.

Additional Demographics

LGBTQ+	1 Yes ⌄
Military Spouse	2 No ⌄
PSLF Status	1 Opt In ⌄
PSLF Date Effective	12/16/2023

This example corresponds with the selections on the sample employee data form above.

Military Spouse

Military Spouse data is collected from the employee on the Employee Affirmative Action and Demographic Data form (or similar agency employee questionnaire) to help determine workforce representation. This helps agencies and the enterprise develop and implement affirmative action plans and strategies to ensure fair representation and make our workforce more diverse and inclusive. Employees can view and update this field in MyPortal.

12. Are you a military spouse or military registered domestic partner?	Yes ☐	No ☒

Sample Military Spouse on the Employee Affirmative Action and Demographic Data form.

- Enter the employee's military spouse status into HRMS by selecting the appropriate option in the Military Spouse drop down menu based on the employee's selection on the employee data form.

- This field will default to Unspecified. If the employee has not yet completed an Employee Affirmative Action and Demographic Data form (or other agency questionnaire) or did not answer the military spouse question, select Unspecified in the Military Spouse field in HRMS.

Additional Demographics

LGBTQ+	1 Yes
Military Spouse	2 No
PSLF Status	1 Opt In
PSLF Date Effective	12/16/2023

This example corresponds with the selections on the sample employee data form above.

PSLF

Public Service Loan Forgiveness (PSLF) Status and Effective Date is collected from the employee when the employee requests employment certification or submits an opt-out form. This information helps agencies track employees who needs annual employment recertification and employees who have opted out and do not need employment certification upon separation.

Sample PSLF employment certification form. The employee can request employment certification by completing their portions of the PSLF form via the online PSLF Help Tool or via a manual form.

Sample PSLF Opt-Out form.

- If the employee has requested PSLF employment certification, select Opt In in the PSLF Status drop down menu in HRMS.

- If the employee has submitted a PSLF Opt Out form, select Opt Out in the PSLF Status field in HRMS.

- The PSLF field will default to Unspecified (or blank). If the employee has not requested PSLF employment certification or has not opted out, select Unspecified in the PSLF Status field in HRMS.

- In the PSLF Date Effective field, enter the date the employee's Opt In or Opt Out status is effective, or if they've opted in, enter the date of their last employment recertification.

This example assumes the employee submitted a PSLF employment certification form and the employer completed the employment certification on December 16, 2023. Recertification will be due one year from that date.