

QUICK REFERENCE GUIDE

Updated February 27, 2019

Use Category Codes Search Tool

Category codes group similar purchases together for analysis. SWIFT uses Category Codes based on the United Nations Standard Products and Services Code (UNSPSC). It is a taxonomy of products and services for use in procurement. The Category Code field in SWIFT is required on all purchasing documents. It must accurately represent the type of purchase. SWIFT has an easy-to-use search tool to help agency staff locate the correct Category Code for a purchase.

This guide provides an overview of how SWIFT uses Category Codes. It describes how to access and use the Category Code search tool. It also lists the Category Codes used in Professional/Technical services.

Overview of Category Codes in SWIFT

1. In general, Category Codes that begin with 1-6 represent a physical good, something tangible. Category Codes beginning with 7, 8 and 9 generally represent a service type of procurement.
2. In a few cases, there is not a UNSCSC Category Code to describe a particular kind of purchase. For those purchases, there are specific SWIFT Category Code to use.
 - Administrative hearings or judges, use 92101800
 - All Grants, regardless of purpose, use 84101501
 - Data sharing agreements, use 93151500
 - Direct or Indirect costs, use 93151600
 - PCard and Fleet Cards, use 84141700
3. You can run query `M_CG_GBL_UNSPSC_TAX_STATUS` to see the complete list of active Category Codes.

Steps to use the Category Code search tool

The Category Search tool for agency staff is located in the NavBar collections on the top, right side of the screen.

Steps to complete

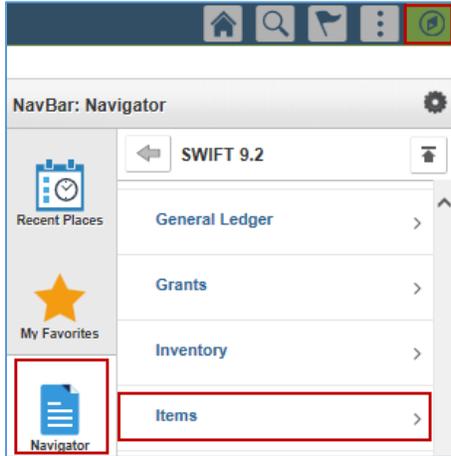
- Step 1: Access the Category Code search tool
- Step 2: Enter a search value in one or more of the Flex Fields
- Step 3: Use the results

Step 1: Access the Category Code search tool

Use the NavBar Navigator: Items, MDC Item Maintenance, MDC Searches, MDC Search Item Categories.

1. On the **NavBar**, find the **Navigator** and search for the **MDC Search Items Categories** page.

Follow this path: Items, MDC Item Maintenance, MDC Searches, MDC Search Item Categories.



2. SWIFT displays the **Item Category Search** tool.

Step 2: Enter a search value in one or more of the Flex Fields

Each of the three *Flex Fields* can be populated with a search value. Common search values are *Keyword* and/or *Long Description*. *Keywords* were added to SWIFT’s Category Codes to make it easier to locate the correct code. Results are more accurate using the *Long Description* field.

We will use the example of looking up “fish nets”.

1. Enter search values.
 - Users can search by just one criteria or up to three. Use a “contains” search when prompted for best results.
 - Use the **Clear Field** icon to change your search values.
 - Press the **Search** button.



SWIFT displays the search results. The search displays 100 rows at a time.

2. Look at the top menu bar to see if there are more rows to view. You may need to view all to get the correct UNSCSC code.

Search Results

1-6 of 6 | View All

| SetID | Market Code | Category Cd | Category ID | Eff Date | Long Description | Keyword |
|-------|-------------|-------------|-------------|------------|--|---|
| SHARE | UN/SPSC | 10101700 | 00769 | 03/01/2018 | Live fish > Live animals > Live Plant and Animal Material and Accessories and Supplies | LIVE FISH SALMON TROUT TILAPIA CARP EELS FINGERLINGS WALLEYE MUSKIE MUSKELLUNGE BLUEGILL |
| SHARE | UN/SPSC | 10101800 | 00770 | 03/01/2018 | Shellfish and aquatic invertebrates > Live animals > Live Plant and Animal Material and Accessories and Supplies | LIVE SHELLFISH SHRIMP LEECHES CLAMS MUSSELS OYSTERS CRABS ABALONE OCTOPI SQUID |
| SHARE | UN/SPSC | 10121700 | 00776 | 03/01/2018 | Fish food > Animal feed > Live Plant and Animal Material and Accessories and Supplies | FISH FOOD PELLETS FLAKES FRESH OR FROZEN BRINE |
| SHARE | UN/SPSC | 10171500 | 00845 | 03/01/2018 | Organic fertilizers and plant nutrients > Fertilizers and plant nutrients and herbicides > Live Plant and Animal Material and Accessories and Supplies | ORGANIC FERTILIZERS AND PLANT NUTRIENTS MANURE GUANO PLANT HORMONES FISH MEAL COMPOST |
| SHARE | UN/SPSC | 21111500 | 00240 | 03/01/2018 | Commercial fishing equipment > Fishing and aquaculture equipment > Farming and Fishing and Forestry and Wildlife Machinery and Accessories | COMMERCIAL FISHING EQUIPMENT FISH HOOKS REELS LINE TACKLE NETS FLOATS SINKERS WEIGHTS NET HAULERS |

Step 3: Use the results of the search

1. Select the **Category Cd** link to see if it describes the purchase.

SWIFT displays **Category Definition** and **Account Restriction** tabs for that record.

2. **Category Definition** tab: You see view the *Long Description*, *Keyword* and one *Account*.

Category Definition | Account Restrictions

SetID SHARE Category ID 00240 Code 21111500

Header 1 of 5 | View All

| | | | | | |
|------------------|--|----------------|--------------------------------|--|----------------|
| Market Code | UN/SPSC | Effective Date | 03/01/2018 | Status | Active |
| Long Description | Commercial fishing equipment > Fishing and aquaculture equipment > Farming and Fishing and Forestry and Wildlife Machinery and Accessories | | | Short Desc | Commercial |
| Description | Commercial fishing equipment > | | | Usage Code | |
| Primary Buyer | | | | Physical Nature | Physical Goods |
| Lead Time Days | 0 | | | VAT Default VAT Service Treatment Setup | |
| Currency | USD | Dollar | | | |
| Account | 471606 | | | | |
| Asset Profile ID | NCP_EQP10 | Description | Non-Capital Equipment - 10 Yrs | | |
| Keyword | COMMERCIAL FISHING EQUIPMENT FISH HOOKS REELS LINE TACKLE NETS FLOATS SINKERS WEIGHTS NET HAULERS | | | | |

3. **Account Restrictions** tab: You can view all of the Accounts attached to the Category Code.

Category Definition | Account Restrictions

SetID SHARE Category ID 00240 Code 21111500

Account Restrictions 1-2 of 2 | View All

| Account | Description |
|----------|-----------------------|
| 1 470606 | Equipment-Capital |
| 2 471606 | Equipment-Non Capital |

4. On the **Account Restrictions** tab, you can press the **Grid Action Menu** icon to download the results in an Excel spreadsheet.

You have successfully reviewed the **Category Code** search tool.

Category Codes for Professional/Technical Services

| Category Code | Description | Use For |
|-----------------------------|--|--|
| 84101501 | Financial assistance > Development assistance > Development finance > Financial and Insurance Services | All Grants, regardless of purpose |
| Codes beginning with 7011 | Horticulture > Farming and Fishing and Forestry and Wildlife Contracting Services | Parks management or maintenance; horticultural counseling services; arborist services |
| Codes beginning with 7012 | Livestock services > Farming and Fishing and Forestry and Wildlife Contracting Services | Livestock management; pets industry; animal health; veterinarian and veterinary lab services |
| Codes beginning with 7013 | Land and soil preparation and management and protection > Farming and Fishing and Forestry and Wildlife Contracting Services | Soil conservation; land use planning, evaluation and reclamation; watershed management |
| Codes beginning with 7015 | Forestry > Farming and Fishing and Forestry and Wildlife Contracting Services | Forest resources management services; forest administration services; forestry monitoring; forestry conservation services |
| Codes beginning with 72 | Building and Facility Construction and Maintenance Services | |
| Codes beginning with 761016 | Hazardous material decontamination > Decontamination services > Industrial Cleaning Services | Asbestos removal or encapsulation |
| Codes beginning with 7612 | Refuse disposal and treatment > Industrial Cleaning Services | Landfill operations; waste disposal, recycling services |
| Codes beginning with 77 | Environmental Services | Environment assessments, planning and advisory services; pollution tracking, monitoring and investigation services; environmental rehabilitation |
| Codes beginning with 78 | Transportation and Storage and Mail Services | Passenger and cargo transport; vehicle and forklift rental and leasing; storage services; vehicle inspection and repair; parking fees |
| 80101500 | Business and corporate management consultation services > Management advisory services > Management and Business Professionals and Administrative Services | Business consulting services |
| Codes beginning with 8011 | Human resources services > Management and Business Professionals and Administrative Services | Personnel recruitment; temporary personnel services |
| Codes beginning with 8012 | Legal services > Management and Business Professionals and Administrative Services | Legal services; legal research services; jury member service; witness and expert witness service |
| Codes beginning with 8013 | Real estate services > Management and Business Professionals and Administrative Services | Property and land rental and leases; escrow, title and appraisal services |

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

| Category Code | Description | Use For |
|---|---|--|
| Codes beginning with 8016 | Business administration services > Management and Business Professionals and Administrative Services | Clerical services; fleet management services; audio visual services; data archiving services; furniture project administration; office equipment rental or leasing services |
| Codes beginning with 8110 | Professional engineering services > Engineering and Research and Technology Based Services | Civil, mechanical, electrical, chemical and traffic engineering; mechanical drawing; machine tool design; lab and office equipment maintenance; sampling services |
| Codes beginning with 8111 | Computer services > Engineering and Research and Technology Based Services | Systems design and development; programming; systems support and security; help desk services; disaster recovery services; internet services; software maintenance or support fees; computer and printer maintenance, rental or leasing services |
| 81130000 | Statistics > Engineering and Research and Technology Based Services | Statistical research and analysis |
| Codes beginning with 811418 | Facilities management > Manufacturing technologies > Engineering and Research and Technology Based Services | Building, power, plumbing and equipment inspection service; safety or risk analysis |
| Codes beginning with 8115 | Earth science services > Engineering and Research and Technology Based Services | Climatology; meteorological service; mapping and map production; land and geological surveying; archaeological services |
| Codes beginning with 8211 | Writing and translations > Editorial and Design and Graphic and Fine Art Services | Technical and non-technical writing; court reporting service; transcribing service; editing service; fact checking service; written translation services; in person language interpretation service |
| Codes beginning with 8212 | Reproduction services > Editorial and Design and Graphic and Fine Art Services | Printing service; photocopying service; engraving service |
| Codes beginning with 83 | Public Utilities and Public Sector Related Services | Payments to utilities; telephone, cell phone and pager service; TV and radio service; internet related services |
| Codes beginning with 8410 EXCEPT 84101501 | Development finance > Financial and Insurance Services | Debt services (negotiation, reorganization, collection), repossession services, co-financing; governmental or non-governmental aid (loans) |
| Codes beginning with 8411 | Accounting and bookkeeping services > Financial and Insurance Services | Notary service; actuary service; financial audit service; financial consultant services; accounting services |
| Codes beginning with 8413 | Insurance and retirement services > Financial and Insurance Services | Insurance payments; pension and retirement payments |
| 84141700 | Business credit agencies > Credit agencies > Financial and Insurance Services | Pcard and fleet cards |
| Codes beginning with 85 | Healthcare Services | Healthcare providers and administrative services; rehabilitation services; disease prevention/control programs; lab services; drug/alcohol testing services; health |

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

| Category Code | Description | Use For |
|---------------------------|---|--|
| | | screening/assessment services; nutrition issues/programs |
| Codes beginning with 86 | Education and Training Services | Education; training; testing services; seminars; workshops |
| Codes beginning with 9010 | Restaurants and catering > Travel and Food and Lodging and Entertainment Services | Catering; cafeteria services; takeout |
| Codes beginning with 9011 | Hotels and lodging and meeting facilities > Travel and Food and Lodging and Entertainment Services | Hotels; motels; meeting rooms |
| 92101700 | Jail and prison system > Public order and safety > National Defense and Public Order and Security and Safety Services | Offender costs; work release; probation services |
| 92101800 | Court system > Public order and safety > National Defense and Public Order and Security and Safety Services | Administrative hearings; judges |
| 93141500 | Social development and services > Community and social services > Politics and Civic Affairs Services | Social services |
| 93151500 | Public administration > Public administration and finance services > Politics and Civic Affairs Services | Data sharing agreements |
| 93151600 | Public finance > Public administration and finance services > Politics and Civic Affairs Services | Expense reimbursements; indirect and direct costs |
| 94100000 | Work related organizations > Organizations and Clubs | Professional memberships |
| Codes beginning with 95 | Land and Buildings and Structures and Thoroughfares | Purchase of property; easements and right of way |