

PeopleSoft®

PeopleSoft 8.8
Global Payroll for the UK PeopleBook

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Global Payroll for the UK PeopleBook
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Global Payroll for the UK Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Global Payroll for the UK PeopleBook* provides you with implementation and processing information for your PeopleSoft Global Payroll for the UK system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	<p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	<p>This is an introductory chapter that broadly explains the product and the functionality within the product.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p>Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p>

Chapters	Description
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality.</p> <p>Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.</p>
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

UK Global Payroll Standard Page Element Definitions

Throughout the UK product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for PeopleSoft Global Payroll for the UK.

Field	Definition
Calendar Run ID	Identifies a grouping of calendars to be processed at the same time.
Department	An identification code that represents an organisation in a company.
Effective Sequence	If you make multiple changes to data on the same date, the <i>Effective Sequence</i> determines the latest change. The higher the number of the <i>Effective Sequence</i> , the more recent the change.

Field	Definition
Employee	The name of an individual associated with your organisation.
Employee Status	Displays an employee's status within your organisation. You define this in the job table. Valid values are A (Active), D (Deceased), L (Leave of Absence), P (Leave with Pay), Q (Retired with Pay), S (Suspended), T (Terminated), U (Terminated without Pay), V (Terminated Pension Pay Out), W (Short Work Break), X (Retired Pension Administration).
End Date	The end date for which a report or process includes data.
Hire Date	The date that an employee is hired.
Job Code	Defines an employee's role within an organisation.
Location	The office where a company is located.
Start Date	The start date for which a report or process includes data.
Valid From	The date from when a change in data applies.
Valid To	The end data for which a change in data applies.

Other UK Terms

There are some differences in the terms used in the Global Payroll core documentation and in the PeopleSoft Global Payroll for the UK documentation. We explain them here:

- PeopleSoft Global Payroll for the UK is a country extension of the Global Payroll product and we refer to it as PeopleSoft Global Payroll for the UK throughout the local documentation. PeopleSoft Global Payroll for the UK is not considered a stand-alone product.
- Global Payroll core documentation uses the term *organisation* throughout. *Organisation* refers to both companies in the private sector and to organisations in the public sector. In the PeopleSoft Global Payroll for the UK documentation, we refer to *company* in many cases because there are pages in the Global Payroll for the UK extension where Company is a required field.

CHAPTER 1

Getting Started With PeopleSoft Global Payroll for the UK

This chapter provides an overview of PeopleSoft Global Payroll for the UK business processes and discusses implementation tasks.

PeopleSoft Global Payroll for the UK Business Processes

The following lists PeopleSoft Global Payroll for the UK business processes:

- Tax and National Insurance
- Employee loans
- Court Orders and Student Loans
- Tax credits
- Absence
- Pension Contributions
- Net-to-gross payments
- Banking
- Payslips
- Inland Revenue Submissions

We cover these business processes in the business process chapters in this PeopleBook.

PeopleSoft Global Payroll for the UK Implementation

The PeopleSoft Global Payroll for the UK table-loading implementation includes setting up the following:

- HRMS fundamental tables, common to multiple PeopleSoft HRMS applications.
- PeopleSoft Human Resources tables.
- PeopleSoft Global Payroll core application tables.
- PeopleSoft Global Payroll for the UK country extension tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Note. The order in which you set up tables required to implement PeopleSoft Global Payroll for the United Kingdom may vary; each individual application isn't necessarily set up in sequence. For example, you may set up Human Resources tables, then tables for the Global Payroll core application, then several tables specific to the country extension, followed by additional Global Payroll core tables. In addition, the order in which you set up tables may also depend on the features you want to use and whether you're implementing one or multiple Global Payroll country extensions. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Global Payroll for the UK requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the PeopleSoft Global Payroll for the UK setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i>

Setting Up PeopleSoft Human Resources Tables

PeopleSoft Global Payroll for the UK requires the setup of tables in various PeopleSoft Human Resources business processes. The following table lists Human Resources setup steps important to the PeopleSoft Global Payroll for the UK implementation, not all required steps.

Step	Reference
1. Set up your UK banking and building society data. In PeopleSoft Global Payroll for the UK, you must set up every bank or building society your organisation deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores details of your workers' bank and building society accounts.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Setting Up Banks and Bank Branches," (GBR) Setting Up UK Banks and Building Societies
2. (Optional). If you want to use PeopleSoft Global Payroll for the UK to process statutory maternity pay, then you need to set up the Monitor Absence business process.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Monitor Absence</i> , "Getting Started With PeopleSoft Human Resources Monitor Absence"

Setting Up PeopleSoft Global Payroll Core Application Tables

PeopleSoft Global Payroll for the UK requires the setup of numerous tables in the PeopleSoft Global Payroll core application.

Step	Reference
1. Set up PeopleSoft Global Payroll core application tables.	<i>PeopleSoft 8.8 Global Payroll PeopleBook</i> , “Getting Started With PeopleSoft Global Payroll”

Setting Up Core PeopleSoft Global Payroll for the UK Tables

The steps discussed in this section suggest an order in which you define information on your PeopleSoft Global Payroll for the UK tables.

Step	Reference
1. Ensure your Pay Entities are defined with the Fiscal Period starting April 6th.	<i>PeopleSoft 8.8 Global Payroll PeopleBook</i> , “Defining the Organizational Structure,” Defining Pay Entities
2. Set up Pay Entity reference information on the Pay Entity Details page. For end of year returns and Inland Revenue reporting, you need to record reference information, such as the tax district and PAYE reference number, for each pay entity	Chapter 3, “Setting Up Country Data,” Defining Pay Entity Details, page 12
3. Set up overrides for each Calendar ID for the elements TAX VR PERIOD, TAX VR BGN YR, and GBR VR RUN TYPE. For TAX VR PERIOD, set the numeric value of the current tax period. For TAX VR BGN YR, set the value equal to the year in which the tax year began. For GBR VR RUN TYPE, enter the run type you require: typically REG (for regular). You can specify other run types, such as SUP (for supplemental), if your setup or rules require it. Doing so links processing with the tax year, tax period, and run type. These variables are retrieved to get data for payslips, reports, and so on.	<i>PeopleSoft 8.8 Global Payroll PeopleBook</i> , “Using Calendars,” Overriding Supporting Elements for a Calendar
4. Build your company-specific employee loan and pension solution. PeopleSoft deliver simple templates as a starting point.	<ul style="list-style-type: none"> • Chapter 7, “Entering Employee Loan Data,” page 29 • Chapter 11, “Entering Employee Pension Scheme Information,” page 57
5. Define your occupational maternity and absence rules. PeopleSoft deliver some example occupational maternity and absence rules.	Chapter 4, “Defining Absence Rules for the UK,” page 15
6. Set up payslips.	Chapter 5, “Setting Up Payslips for the UK,” page 21
7. Review net-to-gross calculations for earnings	Chapter 13, “Calculating Net-to-Gross Payments for the UK,” Setting Up Net-to-Gross Calculations for an Earnings, page 77
8. Review accumulator assignments.	Chapter 13, “Calculating Net-to-Gross Payments for the UK,” Setting Up Net-to-Gross Calculations for an Earnings, page 77

Step	Reference
9. Review the data migration process. Migrating data from your legacy payroll system can involve both manual and automatic steps. For example, you can manually adjust accumulators using a Global Payroll process. The PeopleTools Component Interface architecture enables you to build tools to automate parts of the data migration process.	<ul style="list-style-type: none">• <i>PeopleSoft 8.8 Global Payroll PeopleBook</i>, “Setting Up Accumulators,” Adjusting Amounts of Existing Accumulators• <i>PeopleTools PeopleBook: PeopleSoft Component Interfaces</i>

CHAPTER 2

Understanding PeopleSoft Global Payroll for the UK

This chapter provides an overview of PeopleSoft Global Payroll for the UK, and discusses:

- PeopleSoft Global Payroll for the UK business processes.
- PeopleSoft Global Payroll for the UK integrations.
- Delivered elements for the UK.

PeopleSoft Global Payroll for the UK

PeopleSoft Global Payroll for the UK delivers numerous elements and rules needed to run your payroll system.

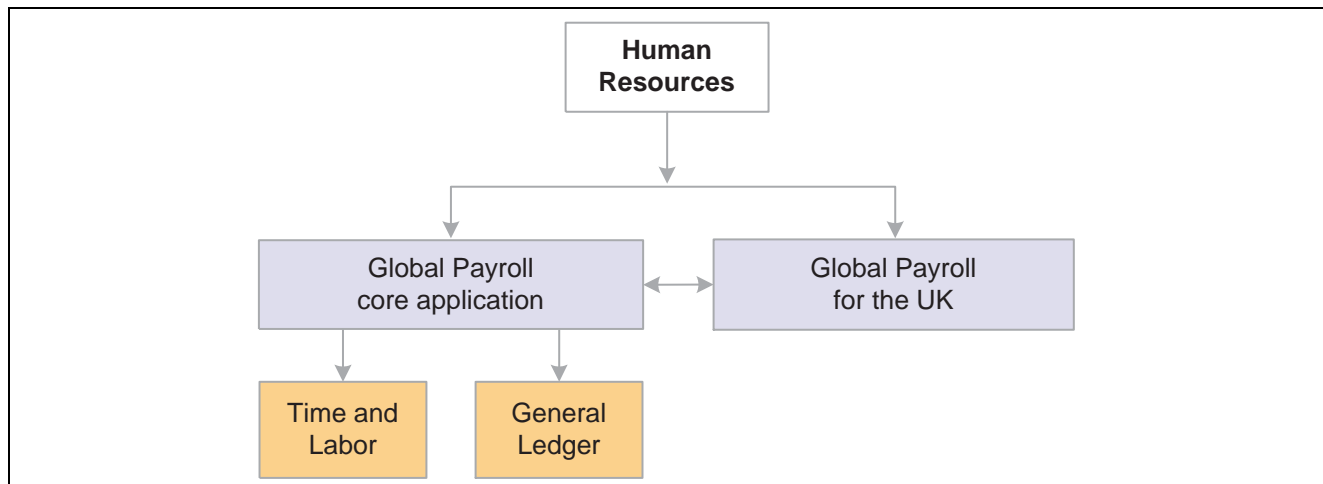
PeopleSoft Global Payroll for the UK Business Processes

PeopleSoft Global Payroll for the UK supports the following business processes:

- Tax and national insurance.
- Employee loans
- Court orders and student loans
- Absence
- Tax credits
- Pension contributions
- Net-to-gross payments
- Payslips
- Banking

PeopleSoft Global Payroll for the UK Integrations

PeopleSoft Global Payroll for the UK integrates with the following PeopleSoft applications:



PeopleSoft Global Payroll for the UK integration flow with other PeopleSoft applications

We cover integration considerations in this PeopleBook. A summary of suggested integration tasks for PeopleSoft Global Payroll for the UK appears with the list of implementation steps earlier in this PeopleBook.

See Also

[Chapter 1, “Getting Started With PeopleSoft Global Payroll for the UK,” page 1](#)

Understanding Delivered Elements

PeopleSoft Global Payroll defines each business process for the UK in terms of delivered elements and rules. Some of these rules are specifically designed to meet legal requirements, while others support common or “customary” payroll practices.

Creating Delivered Elements

All of the elements delivered as part of your country extension were created using the core application—the same application you’ll use both to create additional elements and (in many cases) to configure existing elements delivered as part of your PeopleSoft Global Payroll system. Because the tools needed to redefine or create new payroll elements are fully documented in the core application PeopleBook, we don’t reproduce this information here. Instead, we briefly review the relationship between the core application (which contains the tools you need to define your own elements) and the country extensions (which contain country-specific rules and elements defined by PeopleSoft).

The core application has the following characteristics:

- It consists of a payroll rules engine—a flexible tool that enables users to define the rules of their payroll system and execute payroll and absence calculations.

PeopleSoft Global Payroll does not embed payroll-specific logic or computations in application code. Instead, it specifies all business application logic, such as earnings, deductions, absences, and accumulators, in terms of payroll rules. PeopleSoft Global Payroll enables users to enter and maintain payroll rules through a set of pages and offers a comprehensive set of features that enables users to work in their preferred language or currency.

- It provides a payroll processing framework—a flexible way to define and execute payroll and absence processing flows, such as calendars, run types, pay periods, and process lists.

Country extensions have the following characteristics:

- They are built using the core application.
- They consist of statutory and customary objects (country-specific payroll rules, elements, payroll processes, reports, pages, and self-service applications).

Element Ownership and Maintenance

This section describes PeopleSoft’s approach to element ownership and what this means for the maintenance of UK payroll rules. This information will help clarify which parts of the system you may be required to maintain, what you can modify, and what parts of the system you cannot change.

Understanding Ownership in PeopleSoft Global Payroll

There are five possible categories of element ownership in Global Payroll:

PS Delivered/Maintained	Elements delivered and maintained on an ongoing basis by PeopleSoft.
PS Delivered/Not Maintained	Elements delivered by PeopleSoft that must be maintained by the customer. This category consists primarily of either customary (non-statutory) rules or statutory elements that customers may want to define according to a different interpretation of the rules. Although PeopleSoft may occasionally update elements defined as PS Delivered/Not Maintained, you are not required to apply these updates.
Customer Maintained	Elements created and maintained by your organization. PeopleSoft does not deliver rules defined as Customer Maintained.
PS Delivered/Customer Modified	Elements that were originally PS Delivered/Maintained elements over which the customer has decided to take control (this change is irreversible).
PS Delivered / Maintained / Secure	Delivered elements that the customer can never modify or control.

Understanding Element Ownership in PeopleSoft Global Payroll for the UK

The following table contains an element-by-element description of PeopleSoft Global Payroll for the UK’s approach to element ownership and maintenance.

Element Type	Ownership	Exceptions
Earnings	PeopleSoft (PS) Delivered/Maintained or PS Delivered/Not Maintained	
Deductions	PS Delivered/Not Maintained	Earning Arrestment Deduction
Variables	PS Delivered/Not Maintained	Values that cannot be changed without impacting the calculation.
Bracket	PS Delivered/Not Maintained	If the customer can’t change values, they are defined as PS Delivered/Maintained.

Element Type	Ownership	Exceptions
Accumulators	PS Delivered/Not Maintained for segment accumulators; otherwise, PS Delivered/Maintained.	<p>In general, the nonsegment base accumulators are maintained because customers can modify the funding base segment accumulators. However, the following nonsegment accumulators are not PS Delivered/Maintained:</p> <ul style="list-style-type: none"> • Accumulators for loans and garnishments. • Generic accumulators. • Accumulators for benefits in kind.
Element Group	PS Delivered/Not Maintained	None
Process List	PS Delivered/Not Maintained	None
Section	PS Delivered/Not Maintained	None
Formula	PS Delivered/Maintained	<p>Exceptions if the rule is not strictly legal follow:</p> <ol style="list-style-type: none"> 1. Formulas used to create conditional sections in a process list and generation control formulas are not maintained. <p>Note. To enable you to choose when and how elements are triggered, generation control formulas and formulas used to create conditional sections are defined as PS Delivered/Not Maintained.</p> 2. "Situation" formulas are used to manage specific contracts and are not maintained. <p>Note. Situation formulas are used to control how human resources fields are used in payroll processing. To enable you to determine how to use these fields, situation formulas are defined as PS Delivered/Not Maintained.</p> 3. Most generic formulas are not maintained (except legal rules and specific process formulas). <p>Note. Generic formulas are developed as part of the country setup feature and carry the prefix GEN.</p>

Element Type	Ownership	Exceptions
Array	PS Delivered/Maintained	None
Generation Control	PS Delivered/Not maintained	None. To enable you to choose when and how elements are triggered, generation control formulas have been defined as PeopleSoft Delivered/Not Maintained.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining General Element Information,”
Defining an Element Name (GP_PIN)

Viewing Delivered Elements for the UK

PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK. Instructions for running the query are provided in the *PeopleSoft Global Payroll PeopleBook*.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

CHAPTER 3

Setting Up Country Data

This chapter gives an overview of PeopleSoft-delivered triggers and explains how to set up pay entity details.

Understanding Triggers for PeopleSoft Global Payroll for the UK

In PeopleSoft Global Payroll, the mechanism used to detect online changes to data that should result in some type of system action is called a *trigger*. Examples of common data changes that might use triggers are the hiring of a new payee, a change in pay rate, and a change in job location. There are three types of triggers: iterative, retro, and segmentation.

Before you can use a trigger to process a payee, perform segmentation, or perform retroactive processing, you must set up a trigger definition to tell the system that when a particular change to the database occurs, it should generate the desired trigger. Define Trigger Event IDs on the Trigger Definition Page in the core application.

Review the triggers delivered by PeopleSoft and decide if you need to define additional triggers for your organization. PeopleSoft Global Payroll for the UK delivers a retro trigger for processing starters payments as explained in the following table.

Type	Retro Process Definitionn	Trigger Definition	Purpose
Retro Forwarding	RETRO HIRE	JOB Field name: ACTION Values: HIR, REH	This trigger is used for payees whose first payment is made several pay periods after the initial Hire Date. For this type of payment, the NI contributions have to be made according to the NI code that applies for the reference period.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Setting Up Triggers”

Defining Pay Entity Details

Once you have defined your pay entities, record the Inland References for the pay entities on the the Pay Entity Details page.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining the Organizational Structure,” Defining Pay Entities

Page Used to Set up Pay Entity Details

Page Name	Object Name	Navigation	Usage
Pay Entity Details	GPGB_PYENT	Set Up HRMS, Product Related, Global Payroll, Framework, Organizational, Pay Entity Details GBR	Define pay entity information required by the Inland Revenue.

Setting Up Pay Entity Details

Access the Pay Entity Details page.

Pay Entity Details

Pay Entity:

GGPE01

GBR Pay Entity 01

Employers Name:

Employer's Phone:

Tax District Number:

Tax District Name:

PAYE Reference:

Permit Number:

Pay Entity Details page

Employers Name	Your organization name.
Tax District Number	The number of the tax district that deals with the pay entity's tax records.
Tax District Name	The name of the tax district.
PAYE Reference	The Inland Revenue's reference number for your PAYE scheme.
Permit Number	The Inland Revenue issues employers with a new permit number for each tax year. Enter your permit number for the tax year you're processing.

Note. The Permit Number is used by the End of Year Returns process only.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining the Organizational Structure,” Defining Pay Entities

CHAPTER 4

Defining Absence Rules for the UK

This chapter provides an overview of absence rules and explains how to:

- Define absences for the UK.
- Set up the Statutory Sick Pay scheme.
- Use Occupational Sick Pay and Occupational Maternity Pay schemes.
- Set up absence reasons.
- View delivered absence earnings.

Defining Absence Schemes

PeopleSoft Global Payroll for the UK provides you with the following absence schemes:

- Statutory Sick Pay (SSP) and Statutory Maternity Pay (SMP) schemes: You can also use PeopleSoft Global Payroll for the UK to create your own absence schemes, such as for holidays. UK statutory holiday entitlement has no monetary impact on payroll, it is therefore a Human Resources issue and is not delivered as a standard template by PeopleSoft Global Payroll for the UK.
- Occupational Sick Pay (OSP) and Occupational Maternity Pay (OMP) schemes, which you can configure to meet your own requirements: An OSP or OMP may be mapped to an SSP or SMP scheme, so that one absence may be entered to generate takes from both schemes. You can override entitlement for the first scheme and the scheme that you map to.

In addition, the UK absence feature enables you to view absence exceptions, absence dates, and payment details for all payees.

Note. This section builds upon the information presented in the Working with Absences chapter of the *PeopleSoft Global Payroll PeopleBook*. If you have not yet read this information, we recommend that you do so now.

To define an absence for the UK:

1. Define a work schedule that contains your Qualifying Day week patterns in the core application.
2. Define the reasons for an absence on the Absence Reasons page in PeopleSoft Global Payroll for the UK.
3. For maternity absence, enter data on the Human Resources Maternity Leave UK page.
4. Record an employee's absence on the Entering Absence Events page in PeopleSoft Global Payroll for the UK.

Note. The pages discussed in this chapter can be used to track any kind of absence. That is, you use the same pages for all of the absence schemes that we deliver and maintain (SSP, SMP, OMP, and OSP).

UK Absence Terms

The following is a list of abbreviations that are commonly used in relation to absences in the UK.

SSP (Statutory Sick Pay)	The minimum level of sick pay that you must pay to most employees who are absent from work due to sickness for four or more calendar days in a row.
SMP (Statutory Maternity Pay)	<p>The minimum level of maternity pay to most employees who are absent from work to have a baby.</p> <p>SMP is a weekly payment, and the payment is made in multiples of weeks, regardless of the frequency with which the employee is usually paid. SMP is sometimes paid in a lump sum at the start of the maternity leave period. SMP applies to whole weeks starting on a Sunday through to Saturday. If the employee is ineligible for even one day during a week, then no payment is made for that week.</p>
OMP (Occupational Maternity Pay)	Employers can opt out of paying SMP and provide employees with occupational maternity pay, which is at least equal to the Statutory Maternity Pay entitlement.
OSP (Occupational Sick Pay)	Employers can opt out of paying SSP and provide employees with sick pay, which would be at least equal to the Statutory Sick Pay entitlement.
EWC (Expected Week of Confinement)	The week when an employee's baby is due. This date is always the Sunday of the week in which the baby is due.
QW (Qualifying Week)	The fifteenth week before the EWC.
PIW (Period of Incapacity for Work)	To qualify for SSP, an employee must be absent due to sickness for four consecutive calendar days or more.
MPP (Maternity Pay Period)	The period of 18 weeks during which SMP can be paid. The MPP can start between the eleventh week before the EWC and the Sunday following the birth. The start of the MPP is affected if the employee is absent with a pregnancy-related illness on or after the beginning of the sixth week before the EWC.

Note. The statutory parameters are subject to change. Refer to the latest Inland Revenue Employer's Help Books on SSP and SMP.

Setting Up SSP

PeopleSoft Global Payroll for the UK must use the correct number of qualifying days in a week so that it can pay employees the correct amount of SSP. To determine this, the system uses the Alternate Work Schedule on the Pay Group Name page in the core application. PeopleSoft Global Payroll for the UK delivers definitions for the shifts and workdays for one to seven qualifying days per week.

Note. When you create the work schedule, ensure that the Scheduled Work Hours on the Shift Page reflect the number of qualifying days in the week. Because PeopleSoft Global Payroll for the UK uses the alternate work schedule throughout the SSP process to get rates that depend on the number of qualifying days in the week, this ensures that the correct rate is paid per day of SSP.

Once you have defined the work schedule, you can then assign it to an individual employee or to a pay group using the Shift page.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining the Organizational Structure,” Defining Pay Groups

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Absence Elements,” Selecting the Day Formula, Linked Earnings and Deductions, and Other Take Elements

Using OSP and OMP Schemes

In addition to the templates for SSP and SMP, PeopleSoft Global Payroll for the UK provides templates for OSP and OMP. You can adapt these templates or create your own scheme to meet your company’s requirements.

PeopleSoft Global Payroll for the UK is delivered with OSP and OMP schemes mapped to the statutory schemes. This means that one absence may be entered to generate takes from both schemes. For example, if an employee calls in sick, that employee can be paid both statutory sick pay as well as an employer’s contribution. You can also override entitlement for the first scheme and the scheme that you map to.

If you prefer to use only the statutory schemes, PeopleSoft provides you with the flexibility to turn off the mapped to take facility.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Calculation Elements,” Defining Formula Elements

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Absence Elements,” Selecting the Day Formula, Linked Earnings and Deductions, and Other Take Elements

Setting Up Absence Reasons

This section describes how to define reasons for an absence.

Page Used to Define Absence Reasons

Page Name	Object Name	Navigation	Usage
Absence Reasons	GPGB_ABS_TYPE	Set Up HRMS, Product Related, Global Payroll, Elements, Absence Elements, Absence Reasons GBR	Define an absence type and enter absence codes that further define the absence. For example, if you have an employee who is absent from work due to sickness, record the type of sickness: flu, stomach bug, and so on.

Entering Absence Reasons


Access the Absence Reasons page.

Absence Reasons



Absence Type: SCK

Description: sickness

Absence Codes

Customize | Find | View All | 

First 1 of 1 Last

	Absence Code	Description		
1	FLU	Flu		

Absence Reasons page

Absence Type The system displays the name of the Absence Type that you entered.

Absence Codes

Absence Code Enter any Absence Code that further defines the Absence Type you have created.

Viewing Delivered Absence Earnings

The following table contains information about the earnings used to calculate absences in PeopleSoft Global Payroll for the UK.

Earning	Description
SSP ER PAY	SSP pay
SSP ER P OFF	SSP pay offset
SMP ER PAY1	SMP pay higher rate
SMP ER PAY2	SMP pay lower rate
SMP ER P OFF	SMP pay offset
OMP ER P1 OF	OMP pay offset
OMP ER PAY1	OMP pay full-pay
OMP ER PAY2	OMP pay half-pay
OSP ER OFFSET	OSP Offset
OSP ER P OFF	OSP pay offset
OSP ER PAY1	OSP pay full-pay
OSP ER PAY2	OSP pay half-pay

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”

CHAPTER 5

Setting Up Payslips for the UK

PeopleSoft Global Payroll for the UK provides you with a payroll users payslip. This type of payslip enables payroll administrators to display payslips at any time during the payroll cycle.

This chapter provides an overview of how to:

- Define elements to display on payslips.
- Assign payslips to pay groups.

Note. An employee self-service payslip is also available to PeopleSoft Global Payroll for the UK customers. This type of payslip enables employees to log on and view their payslips once they have been finalised. Although the employee self-service payslip is part of the ePay application, you set up this payslip just as you would the payroll users payslip—within PeopleSoft Global Payroll for the UK—according to the instructions provided in this chapter.

See Also

Chapter 18, “Using Self-Service Applications for the UK,” page 109

Defining Elements to Display on Payslips

Use the Payslip Definition component to define the elements that you want to display on your payslip.

Common Elements Used in This Section

Payslip ID	The payslip ID that you entered to access the page.
Payslip Element Order	Enter the order in which the elements on your payslip are to appear.
Payslip Description	Enter a description for the element. This description will appear on your payslip.
Detail Element Type	A Detail Element Type is an element that adds detail to the information displayed on the payslip (an example would be the NI Category). After selecting the type of detail element, you must select a specific element belonging to the defined type (a specific variable, for example) in the Detail Element field.
Detail Element	Enter the name of a specific element belonging to the element type specified in the Detail Element field.

Entry Type

Select the type of element that you are using: *Abs Entitl* (absence entitlement), *Abs Take* (absence take), *Accumulatr* (accumulator), *Array*, *Auto Assgn* (auto assign), *Bracket*, *Deduction*, *Duration*, *Earnings*, *Formula*, *SystemElem* (system element), or *Variable*.

Note. On the Payslip Positive Input Definition, Payslip Arrears Definition, and Payslip Retro Delta Definition pages, select only earnings or deductions elements.

Current Balance

Enter the element name that you want to use to calculate the current balance for that month.

YTD Balance (year-to-date balance)

Enter the element name that you want to use to calculate the year-to-date balance.

Pages Used to Define Payslip Elements

Page Name	Object Name	Navigation	Usage
Payslip Earnings Definition	GPGB_PSLIP_D_ERNS	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Earnings Definition	Define the earnings that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Pre Tax Deductions	GPGB_PSLIP_D_PTXD	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Pre Tax Deduction	Define the pre-tax deductions that you want to display on your payslip, as well as the order in which those deductions should appear.
Payslip After Tax Deductions	GPGB_PSLIP_D_ATXD	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip After Tax Deductions	Define the after-tax deductions that you want to display on your payslip, as well as the order in which those deductions should appear.
Payslip Tax Definition	GPGB_PSLIP_D_TAX	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Tax Definition	Define the tax elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip National Insurance	GPGB_PSLIP_D_NI	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip National Insurance	Define the National Insurance elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Balances Definition	GPGB_PSLIP_D_BALS	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Balances Definition	Define the balance elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Positive Input Def. (payslip positive input definition)	GPGB_PSLIP_D_POSI	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Earnings Def.	Define the positive input elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Arrears Definition	GPGB_PSLIP_D_ARR	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Arrears Definition	Define the arrears that you want to display on your payslip, as well as the order in which those arrears should appear.
Payslip Retro Delta Definition	GPGB_PSLIP_D_RTO	Set Up HRMS, Product Related, Global Payroll, Payslips, Templates GBR, Payslip Retro Delta Definition	Define the retro payments that you want to display on your payslip, as well as the order in which those payments should appear.

Assigning Payslips to Pay Groups

Once you have designed your payslip, you must assign the payslip to a pay group. In this section we explain how to make payslip assignments.

Pages Used to Assign Payslips to Pay Groups

Page Name	Object Name	Navigation	Usage
Payslip Definition by Pay Group	GPGB_PSLIP_GRP	Set Up HRMS, Product Related, Global Payroll, Payslips, Apply Template to Paygroup GBR	Assign created payslips to a pay group. Each pay group can have its own payslip.

Assigning Created Payslips to Pay Groups

Access the Payslip Definition by Pay Group page.

Pay Group: GGPGMONTH1 GBR Monthly IMIS Paygroup

Definition Find | View All First 1 of 1 Last

Effective Date: 01/01/2000

Self Service Payslip ID: GGTST Test Payslip for IMIS Paygroups

Payroll Users Payslip ID: GGTST Test Payslip for IMIS Paygroups

Printed Payslip ID: GBPS UK Payslip for all Paygroups

Payslip Definition by Pay Group page

- Self Service Payslip ID** Select the ID of the self-service payslip that you want to assign to the pay group.
- Payroll Users Payslip ID** Select the ID of the payroll users payslip that you want to assign to the pay group.
- Printed Payslip ID** Select an ID for the printed payslip (a printed payslip may not have the same setup as the Payroll Users or Self-Service payslip, so it needs its own definition and ID).

CHAPTER 6

Entering Employee Overtime

PeopleSoft Global Payroll for the UK provides a template for calculating and recording any overtime that employees work. This overtime can be salary based (where the system calculates an hourly rate for each employee) or calculated as a factor multiplied by the number of hours multiplied by an overtime rate.

This chapter provides an overview of how to:

- Enter overtime payments.
- Review delivered overtime earnings.

Entering Overtime Payments

Overtime data is created at the job level. That is, if an employee has one or more employment contracts, he or she can be paid overtime rates for each one.

Page Used to Enter Overtime Data

Page Name	Object Name	Navigation	Usage
Overtime	GPGB_EE_OVERTIME	Global Payroll, Payee Data, Assign Earnings and Deductions, Overtime GBR	Enter overtime data for an employee.

Entering Overtime Data

Access the Overtime page.

Overtime

Roberts,AnnaEmployeeEmplID: KG0014Empl Rcd#: 0

Business Unit:Administration - UKHire Date:01/01/1998

Department:Customer ServicesEmployee Status:Active

Job Code:Specialist

Location:Cardiff - Wales

Overtime

Customize | Find | View All | First 1 of 1 Last

	*Pay Period Date	*Start Date	End Date	*Factor	*Hours	Salary Based	*Overtime Rate	Total	
1	19/11/2002					<input type="checkbox"/>			+ -

Overtime page

Pay Period Date	<p>Enter the pay period date when the overtime is to be paid. This date must be within the start and end date of the pay period.</p> <p>The value for this field defaults to the current date, which you can override.</p>
Start Date	<p>(Required) Enter a start date of the period when the employee commenced the overtime.</p> <p>If you select the Salary Based check box, the system checks the hourly rate that applied at that time, even if the rate has since changed.</p>
End Date	<p>(Optional) Enter the last day of the period of overtime that the employee worked. The data that you enter here is used for informational purposes.</p> <hr/> <p>Note. The start and end dates provide you with information about when the overtime was worked.</p> <hr/>
Factor	Enter the factor by which overtime is calculated.
Hours	Enter the number of hours of overtime that an employee has worked during the period that you specified in the Start Date and End Date fields.
Salary Based	Each employee has an hourly rate that is calculated by the system. Select the Salary Based check box if you want to calculate the overtime at this hourly rate.
Overtime Rate	<p>Enter the rate at which overtime is paid. If you select Salary Based, the system automatically enters the overtime rate and makes the field unavailable for entry.</p> <hr/> <p>Note. If you make subsequent changes to the hourly rate on the Job Data – Compensation page, the overtime rate that you enter here prevails unless you return to the Overtime page and update the Overtime Rate field.</p> <hr/>
Total	The system automatically calculates the total gross amount of overtime that an employee is paid. This data is for information only because the actual amount due to the employee is calculated during the payroll process.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,”
Entering Employee Compensation Information

Viewing Delivered Overtime Earnings

PeopleSoft Global Payroll for the UK delivers the earning OVT ER OVTM for overtime payment. This earning calculates the overtime payment that is to be made to the employee.

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”

CHAPTER 7

Entering Employee Loan Data

PeopleSoft Global Payroll for the UK provides a template for calculating repayment of employee loans. You can use this template or edit it to meet your own requirements.

This chapter provides an overview of how to:

- Enter employee loan repayments.
- Review delivered employee loan deductions.

Note. You can process up to three employee loans per employee per pay period. If you have a requirement to process additional loans this should be addressed during your implementation project.

Entering Employee Loan Repayment Data

In Global Payroll for the UK, you must select a repayment method for each payee and loan to define their loan repayment schedule and process their loans. In this section we discuss the steps you must take to define a loan repayment schedule.

Page Used to Enter Employee Loan Repayments

Page Name	Object Name	Navigation	Usage
Employee Loans	GPGB_EE_LOANS	Global Payroll, Payee Data, Loans, Request Loans GBR	Enter loan data for an employee.

Entering Employee Loan Data

Access the Employee Loans page.

Employee Loans

Roberts,Anna

Employee

EmplID: KG0014

Empl Rcd#: 0

Business Unit:

Administration - UK

Hire Date:

01/01/1998

Department:

Customer Services

Employee Status:

Active

Job Code:

Specialist

Location:

Cardiff - Wales

Employee Loans

Customize | Find | View All | First 1 of 1 Last

ID	Start Date	Priority	Loan Amount	Method	Periods	Repaid (Y/N)	
1 ROB_2002	14/01/2002		1000.00	P	10		+ -

Employee Loans page

On the Employee Loans page, the method you specify in the Method field determines the frequency of loan repayments. Select one of two types. Depending on the method that you select, the system displays certain fields and hides others.

Method	Displayed Field	Hidden Field
A: Repay Fixed Amount Per Period	Repayment Amount	Periods
P: Repay Over No. of Periods	Periods	Repayment Amount

ID Enter a unique identifier for each employee loan. This can be any identifier you require, up to 18 characters long. The ID is used as a *user key* for the loan accumulators.

Start Date Enter the date when the first repayment is made. The first loan repayment is taken out of the employee's earnings in the pay period within which the start date falls.

The start date that you enter must be within the start and end dates for the pay period.

Priority If an employee has multiple employee loans, assign each loan a priority. Priority determines the order in which the loans are processed. The lower the number, the higher the priority.

Loan Amount Enter the initial amount of the loan that was taken out by the employee.

Method Select the method that determines the frequency of loan repayments: *Repay Fixed Amount per Period*, and *Repay Over Number of Periods*.

Repayment Amount The system displays this field if you select *Repay Fixed Amount per Period* as your method. Enter the repayment amount to be taken from an employee's earnings each pay period.

Periods	<p>The system displays this field if you select <i>Repay Over Number of Periods</i> as your method. Enter the number of periods over which the loan is to be repaid.</p> <p>Periods are determined by the frequency of the pay period that you defined.</p>
Repaid (Y/N)	<p>When the final loan repayment has been processed, the system issues a warning that the loan has been repaid. At this time, select this check box.</p> <hr/> <p>Note. If you do not select this check box, the system continues to process the loan repayments. However, this does not mean that repayments are made. The system recalculates that the loan has been paid off. By selecting the check box, you are informing the system that it no longer needs to retrieve the loan details for processing.</p> <hr/>

Processing Multiple Employee Loans

PeopleSoft Global Payroll for the UK can process up to three employee loans per employee per pay period. If you want to track which loan is currently being repaid, check the latest payroll results and look at the value of the User Key 1 field on the Accumulators page. This page displays the loans that are currently being paid off. The loan with the highest priority is being paid off first. If a loan on the Employee Loans page has been paid off, it is not listed on the Accumulators page.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Payroll Processing,” Viewing Results by Calendar

Viewing Delivered Employee Loan Deductions

There are three deductions for employee loans, one for each possible loan: LN DD LOAN 1, LN DD LOAN 2, and LN DD LOAN 3.

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”

CHAPTER 8

Managing Court Orders and Student Loans

This chapter provides an overview of court orders and student loans and tells you how to:

- Enter court orders.
- Enter student loans.
- View court order/student loan deductions.

Managing Court Orders

This section provides an overview of court orders and discusses how to enter statutory information about an employee who has been issued with an order from a court or other government agency.

Understanding Court Orders

UK legislation requires that if an employee is issued with an order from a court or other government agency or if an employee took out a student loan after August 1998, an employer must deduct money from that employee's earnings and return it to the relevant authority.

PeopleSoft Global Payroll for the UK assists you in computing and recording the amount of student loan and court order repayments that must be returned to the authorities who issue them.

Depending on the type of order, the amount of money to be paid can be determined by referring to tables published by the Court Service or by applying a percentage to a portion of earnings. Alternatively, the court or other authority making the order may advise repayment of a regular sum.

The following countries in the UK have separate legislation regarding orders from courts and other government agencies:

- England and Wales
- Scotland
- Northern Ireland

This legislation refers to the priority of loans and orders; that is, the legislation refers to the sequence in which deductions should be made if an employee has a student loan and/or one or more orders to pay.

Note. You can either let the system automatically sequence court orders or use the order in which they are defined on the page.

There is no legislation regarding the sequence of court orders from more than one country (for example, if an employee receives one order from England and Wales and another from Scotland). Contact the courts directly if this situation applies to an employee in your organisation.

Page Used to Enter Statutory Information for Employees With Court Orders

Page Name	Object Name	Navigation	Usage
Court Orders	GPGB_EE_CO	Global Payroll, Payee Data, Garnishments/Court Orders, Assign Court Orders GBR	Enter statutory information about an employee who has been issued with an order from a court or other government agency.

Entering Court Order Data

Access the Court Orders page.

Court Orders page

Note. The Normal Deduction Amount, Protected Earnings, and Amount Payable fields may not appear, depending on the Order Type that you select.

Region

Select the country in which the court order was issued.

Sequencing

Select the type of sequencing that you want to use. Valid values are:

System: If you select this option, when you save your information, the system automatically processes the court orders in the correct sequence.

Manual: If you select this option, when you save your information, the system processes the court orders in the sequence that they appear on the screen.

Order Type

Specify the type of court order that must be paid, as notified by the court issuing the order. The order type that is available depends on the region in which the order was issued.

Note. The type of order that you select affects whether the Normal Deduction Amount, Protected Earnings, and Amount Payable fields appear.

Order Types in England and Wales are *AEN* (Attachment Non-Priority), *AEP* (Attachment – Priority), *CCA* (Community Charge AEO), *CTA* (Council Tax AEO), *DEO* (Deduction from Earnings Order).

Order Types in Northern Ireland are *AEN* (Attachment Non-Priority), *AEP* (Attachment – Priority), and *DEO* (Deduction from Earnings Order).

Order Types in Scotland are *CAO* (Conjoined Order), *CMA* (Current Maintenance Arrestment), *DEO* (Deduction from Earnings Order), and *EAO* (Earnings Arrestment Order).

Normal Deduction Amount

Enter the normal deduction amount as stated by the issuing authority.

Protected Earnings

Enter the protected earnings as stated by the issuing authority.

Amount Payable

Enter the initial amount of debt or fines that the employee owes.

Note. Although the amount of initial debt remains constant on this page, the system reduces it by the amount of payments made each period.

Fee

Employers can charge employees with a fee for processing court orders. Employers in England and Wales or Northern Ireland can charge £1.00; in Scotland the fee is 50 pence. For DEO orders, the fee is £1.00 in all areas of the UK.

Court Order Reference

Enter the reference for the court order. Use this number in all correspondence with the court that issued the order.

Start Date for Gen Standing PO

Enter the date when deductions are to start.

Stop Date

Enter the date when deductions are to stop. The court or relevant authority informs you when you should stop making deductions from an employee's earnings.

Active Flag

Select *Active* in this field if you want to process the court order. If you do not, the system does not process the court order.

Managing Student Loans

This section provides an overview of student loans and tells you how to enter student loan information.

Understanding Student Loans

Employers must deduct student loan repayments from the earnings of employees who took out one or more student loans after August 1998. They must then remit these student loan repayments, together with PAYE tax and NICs, to the Inland Revenue. (This law has been in effect since 1 November 1999.)

Note. Student loan repayments are made on a per-pay-period basis; that is, they are non-cumulative.

The Inland Revenue sends you a start notice, informing you when to start deducting the repayments from an employee's earnings. Contributions are a fixed percentage of an employee's salary, provided that they earn more than the amount specified by the Inland Revenue. Once the loan has been repaid, the Inland Revenue sends you a stop notice informing you to stop making the deductions.

PeopleSoft Global Payroll for the UK meets the Inland Revenue's requirements for processing student loans, enabling you to record the amount of loan repayment deducted on the following:

- Employee's payslip.
- P11.
- P45 forms.

Note. For new employees who are already making student loan repayments, their P45 forms display a *Y* in the Student Loan check box.

See Also

[Chapter 17, "Running Payroll Reports," page 101](#)

Page Used to Enter Student Loan Information

Page Name	Object Name	Navigation	Usage
Student Loans	GPGB_EE_STLOAN	Global Payroll, Payee Data, Taxes, Maintain Student Loans GBR	Enter student loan data for an employee.

Entering Student Loan Information

Access the Student Loans page.

Student Loans

Roberts,Anna

Employee

EmplID: KG0014

Empl Rcd#: 0

Business Unit:

Administration - UK

Hire Date:

01/01/1998

Department:

Customer Services

Employee Status:

Active


Job Code:





Specialist

Location:

Cardiff - Wales

Student Loans

Customize | Find | View All |  First 1 of 1 Last

	*Start Date	End Date	Student Loan Reference		
1	16/04/2002 	16/04/2005 	ROB_123_2002		

Student Loans page

- Start Date** Select the date from when employers must start deducting student loan repayments from an employee's earnings.
- End Date** Select the date when employers should stop deducting student loan repayments from an employee's earnings.
- Student Loan Reference** Enter the student loan reference for an employee. Use this reference in all correspondence with the Inland Revenue.

Viewing Delivered Court Order/Student Loan Deductions

PeopleSoft Global Payroll for the UK delivers the following deductions for court orders:

Element Name	Description
CO DD AEN1	AEN1 deduction
CO DD AEN2	AEN2 deduction
CO DD AEN3	AEN3 deduction
CO DD AENF1	Administration fee for AEN1
CO DD AENF2	Administration fee for AEN2
CO DD AENF3	Administration fee for AEN3
CO DD AEP1 R	AEP1 deduction

Element Name	Description
CO DD AEP2 R	AEP2 deduction
CO DD AEP3 R	AEP3 deduction
CO DD AEPF1	Administration fee for AEP1
CO DD AEPF2	Administration fee for AEP2
CO DD AEPF3	Administration fee for AEP3
CO DD CAO CM	CMA as part of a CAO
CO DD CAO EA	EAO as part of CAO calculation
CO DD CAO F	CAO Administration fee
CO DD CCAA1	CCAA deduction 1
CO DD CCAA2	CCAA deduction 2
CO DD CCAA3	CCAA deduction 3
CO DD CCAAF1	Administration fee for CCAA1
CO DD CCAAF2	Administration fee for CCAA2
CO DD CCAAF3	Administration fee for CCAA3
CO DD CCAP1	CCAP deduction 1
CO DD CCAP2	CCAP deduction 2
CO DD CCAP3	CCAP deduction 3
CO DD CCAPF1	Administration fee for CCAP1
CO DD CCAPF2	Administration fee for CCAP2

Element Name	Description
CO DD CCAPF3	Administration fee for CCAP3
CO DD CMA	CMA-only deduction
CO DD CMA FE	CMA fee deduction
CO DD CTA1 R	CTA deduction 1
CO DD CTA2 R	CTA deduction 2
CO DD CTA3 R	CTA deduction 3
CO DD CTAF1	Administration fee for CTA1
CO DD CTAF2	Administration fee for CTA2
CO DD CTAF3	Administration fee for CTA3
CO DD DEO1 R	Deduction for DEO1
CO DD DEO2 R	Deduction for DEO2
CO DD DEO3 R	Deduction for DEO3
CO DD DEOF1	Administration fee for DEO1
CO DD DEOF2	Administration fee for DEO2
CO DD DEOF3	Administration fee for DEO3
CO DD EAO	Earning arrestment deduction
CO DD EAO FE	Administration fee for EA

There is only one deduction that is used to process student loan repayments: SL DD AMOUNT. This calculates the deduction that is to be made from an employee's earnings.

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”

CHAPTER 9

Defining Statutory Tax and National Insurance Details

This chapter provides an overview of how to:

- Understand statutory tax and national insurance.
- Enter statutory tax and national insurance details.
- Update tax rates associated with tax codes.

Understanding Statutory Tax and National Insurance

All employees who are over the age of 16 but below state retirement age, and whose income is above the Lower Earnings Limit (LEL), are required by law to pay National Insurance contributions (NICs). All employees pay Pay As You Earn (PAYE) income tax. The Inland Revenue provides detailed information about the regulations for NICs and PAYE tax.

After hiring an employee in PeopleSoft Human Resources, you must enter the employee's statutory details using pages in PeopleSoft Global Payroll for the UK.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Pages Used to Hire an Employee

Entering Statutory Tax and National Insurance Details

You must provide the system with essential information so that it can generate earnings and calculate tax and National Insurance contributions accurately.

Managing Starters from an NI Perspective

PeopleSoft Global Payroll for the UK automatically calculates National Insurance for new employees who are paid later than the period in which they begin working—for example, an employee starts on 25 May but is not paid all he or she is due until the June payroll. In a situation like this, PeopleSoft Global Payroll calculates the National Insurance contribution for May and June separately and posts the results in the correct period. To activate this feature, the automatic retro feature for National Insurance calculations should be activated at implementation.

Managing Leavers from an NI Perspective

When an employee leaves before receiving final payment, you can adjust the NI category on the NI page according to legislative rules and well as the frequency with which National Insurance is calculated (independently of the employee's pay frequency).

Pages Used to Enter Statutory Tax and National Insurance Details

Page Name	Object Name	Navigation	Usage
Tax	GPGB_EE_TAX	Global Payroll, Payee Data, Taxes, Maintain Tax/NI Data GBR, Tax	Enter an employee's tax details.
NI	GPGB_EE_NI	Global Payroll, Payee Data, Taxes, Maintain Tax/NI Data GBR, NI	Enter an employee's National Insurance details.

Entering Employee Tax Details

Access the Tax page.

The screenshot displays the 'Tax' page for employee Anna Roberts (Employee ID: KG0014). The page is divided into several sections:

- Employee Information:** Roberts, Anna; Employee; EmplID: KG0014; Empl Rcd#: 0.
- Business Unit/Department/Job Code/Location:** Administration - UK; Customer Services; Specialist; Cardiff - Wales.
- Tax Details:**
 - *Effective Date: 19/11/2002
 - Notification Source: P45
 - Scottish Variable: ☐
 - Tax Code: [Blank]
 - Tax Basis: [Blank]
 - P45 - Calendar Group ID: [Blank]
 - Previous Employer PAYE ID: [Blank]
 - Leave Date of Last Employment: [Blank]
 - Employment: Previous Employer Pay Period: [Blank]
 - Previous Employer Tax Basis: [Blank]
 - Previous Tax Code: [Blank]
 - P45 Pay to Date: [Blank]
 - P45 Tax to Date: [Blank]

Tax page

Notification Source

Select the notification source of the employee's tax code: *OTH* (other), *P38S*, *P45*, *P46*, *P6*, *P7X*, *P9*, *P9T*, and *P9X*.

You can also leave this field blank.

Depending on the Notification Source that you select, the system displays certain fields and hides others.

Notification Source	Fields That Appear
P38S, P6, P7X, P9, P9T, P9X	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
OTH	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
	Notes
P45	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
	Previous Employer PAYE ID
	Leave Date of Last Employment
	Previous Employer Pay Period

Notification Source	Fields That Appear
	Previous week/month indicator (weekly or monthly)
	Tax Year from P45
	Previous Employer Tax Basis (cumulative, week 1/month 1)
	Previous Tax Code
	P45 Pay to Date
	P45 Tax to Date
P46	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
	Statement A—P46
	Statement B—P46
	Statement C—P46

Scottish Variable

The Scottish Variable indicator is intended for employees who are Scottish taxpayers. If you select this check box, the tax code that you enter must be prefixed by an *S*.

The Scottish parliament has statutory powers to vary the prevailing base rate of tax by plus or minus 3 pence. For example, if the prevailing base rate in England or Wales is 22 pence, the Scottish base rate could fluctuate between 19 pence and 25 pence. In all other respects, the Tax Code operates precisely as the primary base rate. Currently there are no indications that the Scottish parliament will invoke its statutory powers to adjust the primary base rate, but it could be invoked at any time with only limited notification.

Note. Scottish legislation requires that the Scottish Variable check box is available in payroll systems even though it is not currently in use. You can hide this option.

Tax Code	Enter the employee's tax code for the current tax year. PeopleSoft has built various validation rules into this field.
Tax Basis	Enter the basis on which the employee's <i>current</i> employer calculates tax.
P45 – Calendar Group Id	If the employee's P45 report has been printed, this field will display the Calendar Group ID containing the calculations on which the P45 was based. If you need to reprint the P45, this field enables you to identify which calculations (identified by Calendar Group ID) were used to create the original P45, so that you can reprint using the same set of results (remember, if the P45 needs to be reprinted, it should be reprinted using the same results used to generate the original report).

Note. This field contains a value only when the P45 report has been run.

See [Chapter 17, “Running Payroll Reports,” Running the P45 Report, page 104](#).

OTH Notification Source

Notes	If you select Notification Source <i>OTH</i> , the system displays a notes section where you can enter the notification source of the employee's tax code.
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P45 Notification Source

When employees leave an organisation, they are handed a P45 form. This form provides the information that is required here.

Note. Because PeopleSoft Global Payroll uses the P45 details that you enter on this page in the tax calculation process, ensure that they are accurate.

Previous Employer	Enter the name of the previous employer.
PAYE Id	Enter the PAYE reference that is recorded on the P45 form.
Leave Date of Last Employment	Enter the leaving date that is recorded on the P45 form.
Previous Employer Pay Period	Enter the last pay period when the employee was paid.
Previous week/month indicator	Select whether the employee was paid on a weekly or a monthly basis: <i>W</i> (week) and <i>M</i> (month).
Tax Year from P45	Enter the tax year to which the P45 applies.
Previous Employer Tax Basis	Enter the basis on which the employee's previous employer calculated tax: <i>Cumulative</i> and <i>Week 1/Month 1</i> .

Previous Tax Code	Enter the tax code that is recorded on the P45 form.
P45 Pay to Date	Enter the total pay to date that is recorded on the P45 form.
P45 Tax to Date	Enter the total tax to date that is recorded on the P45 form.

P46 Notification Source

Statement A—P46	Select if the employees have ticked statement A on their P46 forms.
Statement B—P46	Select if the employees have ticked statement B on their P46 forms.
Statement C—P46	Select if the employees have ticked statement C on their P46 forms.

Note. Section 1 of the P46 form contains three statements: A, B and C. The employee must tick each box that applies to them.

Managing Leavers for Tax Purposes

When an employee leaves before receiving their final payment, you can adjust the tax code using the normal manual procedure – or if the P45 has already been run and processed, the tax code will be adjusted to BR Wk 1/Mth 1 automatically.

Entering Employee Statutory National Insurance Details

Access the NI page.

The screenshot displays the 'NI' (National Insurance) page for an employee named Roberts, Anna. The page is divided into several sections:

- Employee Information:** Roberts, Anna (Employee), EmplID: KG0014, Empl Rcd#: 0.
- Business Unit:** Administration - UK
- Department:** Customer Services
- Job Code:** Specialist
- Location:** Cardiff - Wales
- NI Details:**
 - Effective Date:** 19/11/2002
 - NI Category Code:** [Field with search icon]
 - Multiple Employment ?** [Checkbox]
 - NI Approved Pension Scheme** [Checkbox]
 - RL Certificate seen ?** [Checkbox]
 - DEF Certificate seen ?** [Checkbox]
 - Age Certificate seen ?** [Checkbox]
- Periods:**
 - NI Frequency:** [Dropdown menu]
 - NI Override Period:** [Field]
- Directors:**
 - Director Indicator** [Checkbox]
 - Director Start Date:** [Field with calendar icon]
 - Directors NI Calc:** [Field with search icon]
 - Director End Date:** [Field with calendar icon]
- CONS:**
 - SCON:** [Field]
 - ECON:** [Field]

NI page

NI Details

Multiple Employment?	Select if the employee has multiple jobs, and you want to aggregate National Insurance for each job (for NI calculation purposes).
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Note. You must be sure to select the Multiple Employment? flag against each job to aggregate them.

NI Category Code (National Insurance category code)

Displays the National Insurance contribution table letter under which National Insurance contributions are payable. This is a required field because all employees over the age of 16, under state retirement age, and whose income is above the LEL should pay National Insurance contributions.

The NI Category Code is required for all legislative reporting, such as payslips and end-of-year documentation. An employee's payslip cannot be calculated without this information.

Valid values are:

A: Not contracted-out National Insurance contributions.

AA: Not contracted out in appropriate personal pension.

B: Reduced rate not contracted out. This category applies to only female employees.

BA: Reduced rate not in appropriate personal pension. This category applies to only female employees.

C: Over state retirement age or not contracted-out salary-related pension scheme. This category code can also be used for deferment certificates.

Co: Contracted-out deferment certificate in contracted-out, salary-related pension scheme.

D: Contracted-out money purchase pension scheme (COSR).

E: Reduced rate COSR. This category applies to only female employees.

F: Contracted-out money purchase pension scheme (COMP).

G: Reduced rate COMP. This category applies to only female employees.

S: Contracted-out deferment certificate in contracted-out money purchase scheme.

X: No National Insurance contributions (for example, for overseas employees).

NI Approved Pension Scheme (National Insurance approved pension scheme)

This field not in use and will be hidden in future releases.

RL Certificate seen?

This field is available for entry if you select the NI Category Code *B*, *E*, or *G*. Select this check box if the employee has a valid certificate and therefore complies with the eligibility regulations for this category. This check box reminds you that the employee should have a valid certificate.

DEF Certificate seen?

This field is available for entry if you select the NI Category Code *C*, *Co*, or *S*. Select this check box if the employee has a valid certificate and therefore

complies with the eligibility regulations for this category. This check box reminds you that the employee should have a valid certificate.

Age Certificate seen?

This field is available for entry if you select the NI Category Code C. Select this check box if the employee has a valid certificate and therefore complies with the eligibility regulations for this category. This check box reminds you that the employee should have a valid certificate.

Periods

NI Frequency (National Insurance frequency)

Readjusts when National Insurance contributions are calculated, regardless of the pay group that the employee is assigned to.

For example, payments made after an employee leaves a company must be made on a weekly basis. This field overrides the payroll calculation. In the case of an employee who is leaving an organisation, the default is the payment frequency setting on the calendar. This field overrides that default at the payee level.

Valid values are:

Weekly: Select if you want to calculate National Insurance contributions on a weekly basis.

Bi-Weekly: Select if you want to calculate National Insurance contributions on a fortnightly basis.

4-Weekly: Select if you want to calculate National Insurance contributions on a four-weekly basis.

Monthly: Select if you want to calculate National Insurance contributions on a monthly calendar basis.

Quarterly: Select if you want to calculate National Insurance contributions on a quarterly basis.

Annually: Select if you want to calculate National Insurance contributions on a yearly basis.

NI Override Period (National Insurance override period)

Displays the period over which default settings for National Insurance contributions are overridden.

Directors

There are special rules for calculating National Insurance contributions for company directors. An employee who is a director at the beginning of the tax year (6 April) has an annual earnings period for that tax year, even if he or she ceases to be a director before the end of the tax year (5 April). Employees who are first appointed as company directors *during the current tax year* have a pro-rata earnings period for the rest of the current tax year, based on the date when they were appointed as directors (rather than the day when they were first paid as directors).

It is therefore important that you specify whether employees are directors and when they became directors because the system calculates directors' National Insurance contributions on an annual or pro-rata annual basis accordingly.

Note. Directors' National Insurance contributions are calculated on a cumulative basis, unlike other employees whose National Insurance contributions are calculated each week or each month. According to legislation, for the last payment of earnings in a tax year to that employee, the system must reassess directors' earnings on the basis of an annual or pro-rata annual earnings period, whether directors are paid on a weekly or monthly basis.

Director (Y/N)	Select if an employee is a company director. You must enter the date when the employee became a director because this affects how the system calculates National Insurance contributions.
Directors NI Calc (Directors National Insurance calculation)	Displays how a company director's National Insurance contributions are calculated. Valid values are: <i>Director's Cumulative Calc</i> (director's cumulative calculation): Select if you want to calculate a director's National Insurance contributions on a cumulative basis. This means that the earnings period for the assessment of directors' National Insurance contributions is annualised. <i>Directors Non Cumulative Calc</i> (directors non-cumulative calculation): Select if you want to calculate a director's National Insurance contributions as you would for a regular employee.
Director Start Date	Enter the date the employee became a director.
Director End Date	Enter the date the employee ceased to be a director. This date must be entered against the actual row on which you entered the start date of the directorship--in case there is a further period of directorship for the company (a second term of directorship requires a new row of information).
CONs	
SCON (Scheme Contracted Out Number)	Applies to the following National Insurance categories: <i>F</i> , <i>G</i> , and <i>S</i> for contracted-out money purchase schemes or contracted-out money purchase stakeholder pension schemes.
ECON (Employer Contracted Out Number)	Enter the ECON that applies for contracted-out National Insurance categories <i>Co</i> , <i>D</i> , <i>E</i> , <i>F</i> , <i>G</i> and <i>S</i> .

Changing Tax Rates Associated with Tax Codes

This section explains how to run the Tax Code Uplift process that changes the tax rates for tax codes with specific suffix.

Page Used to Run the Tax Code Uplift Process

Page Name	Object Name	Navigation	Usage
Taxcode Uplift	GPGB_TAXCODE_UPLIFT	Global Payroll, Taxes, Uplift Tax Codes GBR	Change the tax rates associated with specific tax codes.

Changing Tax Rates Associated with Specific Tax Codes

Access the TaxCode Uplift page.

Taxcode Uplift

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Report Request Parameter(s)

Tax Uplift ☒ Week 1 Month 1 ☐

Pay Group: GGPGLUNAR Calendar Group ID: GGL2001/L1P-12

Code Letter: Tax Amount: Uplift Date: 13/01/2002

Taxcode Uplift page

Report Request Parameters If you want to perform a tax uplift, select *Tax Uplift*; if you want to change all the Week1/Month1 indicators to a cumulative basis for the first processing period in a new tax year, select *Week 1 Month 1*.

If you select *Week 1 Month 1*, the Code Letter, Tax Amount, and Uplift Date fields become unavailable for data entry.

Pay Group Specify the pay group subject to the tax uplift, or for which Week 1/Month 1 indicators are being changed.

Calendar Group ID Identify the Calendar Group ID for which the new tax rate needs to be processed, or for which Week 1/Month 1 indicators are being changed.

Code Letter All employee tax codes are associated with a “letter” or suffix. In the Code Letter field you must identify the suffix of the specific tax code that needs to be increased or “uplifted.” For example, in the year 2001/2002, all tax codes with a suffix of “L” must be increased by 15 percent.

Tax Amount Enter the percentage amount by which you want to increase the tax code with the code letter specified in the Code Letter field.

Note. You can also decrease the amount by entering a negative number.

Uplift Date

Enter the date that the tax code increase (uplift) goes into effect.

Viewing P45 Information Online

This section explains how to view a terminated employee's P45 information.

Page Used to View a P45

Page Name	Object Name	Navigation	Usage
View P45	GPGB_EE_P45	Global Payroll, Payee Data, Terminations, Review P45 GBR	Used to view a terminated employee's P45 information. To view P45 data for an employee, you have to select the Calendar Group ID that matches with the last calculation indicated on the Statutory Tax page. The view is based on data in the result tables, and is independent of the P45 report.

CHAPTER 10

Entering Employee Tax Credits

This chapter provides an overview of Inland Revenue requirements regarding tax credits and describes:

- How to enter employees' tax credit information.
- The PeopleSoft-delivered tax credit earnings.

Understanding Tax Credits

Beginning in April 2000, employers who operate a PAYE scheme have to pay eligible employees tax credits through the payroll; that is, employers must include tax credit with pay at the end of each pay period. The Inland Revenue informs the employer if an employee is eligible for tax credits. For example, if employees are paid on a weekly basis, their tax credits are also paid weekly, together with their earnings. The Inland Revenue tells employers when they should start paying tax credits, how much to pay, and when to stop.

PeopleSoft Global Payroll for the UK meets the Inland Revenue's requirements for processing tax credits. Use it to do the following:

- Calculate the tax credits for the pay period from a daily date and pay them through the payroll.
- Display the tax credit amount to be paid on an employee's payslip.
- Record the total tax credits paid in a tax year.
- Record tax credits on the P14, P60, and P45 reports.
- Complete Certificates of Payments (TC02) reports when you have to stop paying tax credit earlier than the end of your responsibility (for example, if an employee leaves your organisation).

Entering Tax Credit Information

To trigger a tax credit, you must record tax credit information for your employees on the Tax Credit page.

Pages Used to Enter Tax Credit Information

Page Name	Object Name	Navigation	Usage
Tax Credits	GPGB_EE_TAXCRD	Global Payroll, Payee Data, Taxes, Maintain Tax Credits GBR	Record tax credit information for an employee.

Recording Employee Tax Credit Information

Access the Tax Credits page.

Tax Credits

Campbell, Elaine

Employee

EmplID: KG0006

Empl Rcd#: 0

Business Unit:

Sales and Marketing - UK

Hire Date:

06/03/2000

Department:

Sales and Marketing - Scotland

Employee Status:

Active

Job Code:

Marketing Executive

Location:

Edinburgh - Scotland

Tax Credits

Customize | Find | View All | First 1 of 1 Last

	Start Date	End Date	Stop Date	Tax Credit Daily Rate	Tax Credit Reference		
1	14/02/2002	31/01/2003	31/01/2003	10	CMP_CREDIT	+	-

Tax Credits page

Tax Credits

Enter the tax credit data that applies to an employee.

Note. Only one tax credit can be running at any time. If an employee has more than one tax credit in a pay period (this is possible for employees who are paid quarterly, for example), make sure that the start dates and end dates do not overlap. In the unlikely event that an employee has more than three tax credits, you can enter more than three in the system, but the system processes and pays only three tax credits in any one pay period.

Start Date

Select the date from which you must start paying tax credit to an employee. The Inland Revenue sends you a start notification by post, giving you either 14 (for weekly paid employees) or 42 days' notice (for all other employees).

End Date

Select the date when your responsibility for paying tax credits to an employee ends. The Inland Revenue notifies you of both the start date and the end date.

Note. If you do not specify an end date, the system automatically calculates the end date as 26 weeks after the start date that you enter. For example, if the start date is 23/4/2000, the system automatically sets the end date as 21/10/2000. You can override this date.

Stop Date

Change the stop date if you have to stop paying tax credit to an employee before the end date on the start notification.

Note. If you do not enter a specific stop date, the system automatically sets the end date to the stop date.

For example, if you receive a stop notice from the Inland Revenue, enter the date from when you must stop paying tax credits. The stop date then overrides the end date; that is, the end date no longer applies.

Tax Credit Daily Rate	Enter the daily amount that applies to each calendar day for which you must pay tax credit. The Inland Revenue notifies you of this amount.
Tax Credit Reference	Enter any reference that the Inland Revenue uses with reference to this employee's tax credits.

Stopping Tax Credit Payments

If you receive notification from the Inland Revenue to stop paying tax credits to an employee before the end date on the start notification, you must stop paying tax credit as instructed. For example, if an employee leaves your organisation, you do not have to pay tax credit from the last day of their employment. PeopleSoft Global Payroll for the UK automatically takes this change into consideration and stops paying tax credits accordingly.

Note. If you want to stop paying tax credit to an employee who is involved in a trade dispute, for example, or because an employee is leaving within three months, you must manually stop the payment in the system. PeopleSoft Global Payroll for the UK does not calculate this automatically.

If a tax credit is running when an employee leaves, you must return report TC02 to the Inland Revenue. This contains details of the last tax credit that was paid, as well as the total paid to date on that tax credit.

You must show the tax credit paid on the employee's payslip, as well as record the total tax credits paid in a tax year for an employee on the P14 and P60 reports.

See Also

Chapter 17, "Running Payroll Reports," page 101

Viewing Delivered Tax Credit Earnings

PeopleSoft Global Payroll for the UK provides the earnings TC ER TXCRD1 for tax credits. This is the tax credit payment event earnings. It is paid per pay period and is accumulated over the tax year.

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, "Delivered Elements and System Data"

PeopleSoft 8.8 Global Payroll PeopleBook, "Defining Earnings and Deduction Elements"

CHAPTER 11

Entering Employee Pension Scheme Information

This chapter provides an overview of how to:

- Enter standard and stakeholders pension scheme data.
- Review delivered pension schemes deductions.

Understanding Pension Schemes

PeopleSoft Global Payroll for the UK provides you with a sample template that you can use as a starting point for processing two kinds of pension schemes: standard occupational pensions and stakeholders pensions. Because pension schemes are not a statutory requirement, you should tailor the provided template to your own requirements or create your own.

Pension schemes are created at the job level. That is, if an employee has multiple employment contracts, the employee can have different pension schemes for different contracts.

Within the two main pension types, we support the following kinds of employee and employer contributions:

- A fixed scheme, in which an employee and an employer can pay a fixed amount per pay period.
- A percentage scheme, in which both employee and employer pay a certain percentage of employee earnings per pay period.
- An additional voluntary contribution scheme, in which the employee can contribute a fixed amount or percentage.

Entering Standard and Stakeholders Pension Scheme Data

In PeopleSoft Global Payroll for the UK you can set up either a standard pension scheme or a stakeholders pension scheme for your employees.

Pages Used to Enter Employee Pension Scheme Data

Page Name	Object Name	Navigation	Usage
Pension Details	GPGB_EE_PENSION	Global Payroll, Payee Data, Pension Information, Assign Scheme GBR	Enter standard pension scheme data for an employee.
Stakeholders	GPGB_EE_STKHL	Global Payroll, Payee Data, Pension Information, Stakeholders Pension GBR	Enter stakeholders pension scheme data for an employee.

Entering Standard Pension Scheme Data

Access the Pension Details page.

Pension Details

Campbell, Elaine Employee **EmplID:** KG0006 **Empl Rcd#:** 0

Business Unit: Sales and Marketing - UK **Hire Date:** 06/03/2000
Department: Sales and Marketing - Scotland **Employee Status:** Active
Job Code: Marketing Executive
Location: Edinburgh - Scotland

Pension Schemes Customize | Find | View All | First 1 of 1 Last

	*Scheme	Employee Percentage	Employer Percentage	Employee Amount	Employer Amount	*Start Date	End Date
1	FIXA			250	250	03/06/2000	

Pension Details page

Pension Schemes

Scheme	Select the type of pension scheme that you require: <i>AVCI</i> , <i>FIXA Fixed Scheme A</i> , or <i>PCTB Percentage Scheme B</i> .
Employee Percentage	This field is available for entry only if you select either the <i>Percentage Scheme</i> or <i>AVCI</i> in the Scheme field. Enter the percentage of employee earnings that the employee must pay towards the pension scheme.
Employer Percentage	This field is available for entry only if you select the <i>Percentage Scheme B</i> in the Scheme field. Enter the percentage of employee earnings that the employer must pay towards the pension scheme.
Employee Amount	This field is available for entry only if you select either the <i>FIXA Fixed Scheme A</i> or <i>AVCI</i> in the Scheme field. Enter the fixed amount of money that an employee must put towards the pension scheme each pay period.
Employer Amount	Enter the amount of money that an employer must put towards the pension scheme each pay period.
Start Date	Select the start date when the pension scheme is processed.
End Date	Select the end date when the pension scheme is processed.

Note. You can create multiple rows for the same employee as long as the scheme type is not the same. For example, you can create a pension scheme based primarily on percentage contributions and then create a new row for an additional, voluntary contribution of a fixed amount.

Entering Stakeholders Pension Scheme Data

Access the Stakeholders page.

Stakeholders

Campbell, Elaine

Employee

EmplID: KG0006

Empl Rcd#: 0

Business Unit:

Sales and Marketing - UK

Hire Date:

06/03/2000

Department:

Sales and Marketing - Scotland

Employee Status:

Active


Job Code:






Marketing Executive

Location:

Edinburgh - Scotland

Pension Schemes

Customize | Find | View All |  First 1 of 1 Last

	*Scheme	Employee Percentage	Employer Percentage	Begin Date	End Date		
1	PCT 	5	10	23/07/2002 			

Stakeholders page

Pension Schemes

Scheme	Select the type of pension scheme that you require. Valid values are <i>AMT</i> (Fixed Amount Scheme) and <i>PCT</i> (Percentage Scheme).
Employee Percentage	This field is available for entry only if you enter <i>PCT</i> (Percentage Scheme) in the Scheme field. Enter the percentage of employee earnings that the employee must pay towards the pension scheme.
Employer Percentage	This field is available for entry only if you enter <i>PCT</i> (Percentage Scheme) in the Scheme field. Enter the percentage of employee earnings that the employer must pay towards the pension scheme.
Employee Amount	This field is available for entry only if you enter <i>AMT</i> (Amount) in the Scheme field. Enter the fixed amount of money that an employee must put towards the pension scheme each pay period.
Employer Amount	This field is available for entry only if you enter <i>AMT</i> (Amount) in the Scheme field. Enter the amount of money that an employer must put towards the pension scheme each pay period.
Begin Date	Select the start date when the pension scheme is processed.
End Date	Select the end date when the pension scheme is processed. The End Date is a mandatory field.

Note. Create multiple rows for the same employee as long as the scheme type is not the same. For example, you can create a pension scheme based primarily on percentage contributions and then create a new row for an additional, voluntary contribution of a fixed amount.

Viewing Delivered Pension Scheme Deductions

PeopleSoft Global Payroll for the UK delivers the following deductions for the standard and stakeholder pension schemes:

Standard Pension Scheme

Deduction	Description
PEN DD EE	Deduction to process standard employee pension deduction.
PEN DD ER	Deduction to process the standard employer pension deduction.

Stakeholder Pension Scheme

Deduction	Description
STK DD EEAMT	Deduction to process the stakeholder pension employee amount.
STK DD ERAMT	Deduction to process the stakeholder pension employer amount.
STK DD EEPCT	Deduction to process the stakeholder pension employee percent.
STK DD ERPCT	Deduction to process the stakeholder pension employer percent.

Note. PeopleSoft delivers a PeopleTools query that you can run to view the names of all delivered elements that are designed for the UK.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”

CHAPTER 12

Entering Employee Absences

This chapter describes how to record employees' absences and how to view absence details.

Recording Employee Absences

This section describes how to record an employee's absence from work due to sickness, maternity leave, or any other absence scheme that you may have set up. Before you can enter an absence, first define the possible reasons for an absence on the Absence Reasons page. Then record an employee's absence on the Absence Data page.

Note. PeopleSoft Global Payroll for the UK provides you with several pages where you can record in detail an employee's absence, although you do not have to complete all of them. For example, you would not have to complete the Maternity Dates Page if a male employee is off sick.

Pages Used to Enter Absence Events

Page Name	Object Name	Navigation	Usage
Absence Data	GPGB_ABS_EVENT_1	Global Payroll, Payee Data, Maintain Absences, Absence Event GBR, Absence Data	Record data about an employee's absence from work. Before using this page, first set up absence types and absence codes on the Absence Reasons page.
SSP Disqualification Details	GPGB_ABS_DIS_SEC	Click the SSP Disqualification link on the Absence Data page.	Record the date when and the reason why an employee is no longer paid SSP.
Notification of Absence	GPGB_NOTIFY_SEC	Click the Notification of Absence link on the Absence Data page.	Record how you were notified of an employee's absence. Use this information for reporting purposes.
Absence Certificate Details	GPGB_ABS_CERT_SEC	To access the Absence Certificate Details page, click Absence Certificate Details on the Absence Data page.	Record the type of certificate supplied by an employee to support the absence. Use this information for reporting purposes.

Page Name	Object Name	Navigation	Usage
Process Details	GPGB_ABS_PROC_SEC	Click the Process Details link on the Absence Data page.	View information about the last time the absence was processed. It also displays the calendar group in which the absence was processed and the date when the absence was last updated. This page is display only and is intended for tracking purposes.
Additional Information	GPGB_ABS_EVENT_2	Global Payroll, Payee Data, Maintain Absences, Absence Event GBR, Additional Information	Record additional information about an employee's absence.
User Defined Fields	GPGB_ABS_CNFG_SEC	Click the User Defined Fields link on the Additional Information page.	Define the four fields that you can use to enter additional information about an absence.
Override/Adjust Entitlement	GPGB_OVRD_ENT_SEC	Click the Override/Adjust Entitlement link on the Additional Information page.	Change the entitlement for an absence scheme. This applies only to absences that have a <i>per absence entitlement</i> .
Override Average Earnings	GPGB_ABS_ERNS_SEC	Click the Override Average Earnings link on the Additional Information page.	Override an employee's average earnings. For example, SSP and SMP calculate an employee's average earnings per week. If you have a new employee with no payment history, you may want to override that employee's average earnings to a more realistic amount.
Maternity Dates	GPGB_MAT_SEC	Click the Maternity Dates link on the Additional Information page.	Record data about the EWC and the actual week of confinement.
Override/Adjust Entitlement for Mapped to Scheme	GPGB_OVRD_MAP_SEC	Click the Override/Adjust Entitlement for Mapped to Scheme link on the Additional Information page.	Override entitlement for the scheme to which you mapped on the Day Formula page in the core application. This applies only to absences that have a <i>per absence entitlement</i> . Note. The fields on this page are identical to those on the Override/Adjust Entitlement page.
Comments	GPGB_ABS_EVENT_4	Global Payroll, Payee Data, Maintain Absences, Absence Event GBR, Comments	Enter any additional comments about an employee's absence.

Recording Employee Absence Data

Access the Absence Data page.

The screenshot displays the 'Absence Data' page for employee Campbell, Elaine (ID: KG0006, Empl Rcd#: 0). The page has three tabs: 'Absence Data', 'Additional Information', and 'Comments'. The 'Absence Data' tab is selected, showing a search bar with 'Find | View All' and navigation controls 'First', '1 of 1', and 'Last'. The main form includes fields for 'Absence Take' (SSP AT1), 'Process Action' (Normal), and checkboxes for 'Voided' and 'Manager Approved'. Below these are sections for 'Dates' (Begin Date: 01/10/2002, End Date: 31/10/2002), 'Partial Hours', 'Or Half Day', and 'Or Apply to All Days'. The 'Absence Reason' section shows 'Absence Type' (SCK - sickness) and 'Absence Code' (FLU - Flu). The 'Override Payment' section has radio buttons for 'Paid' and 'Unpaid'. At the bottom, there are links for 'Notification of Absence', 'Absence Certificate Details', 'Process Detail', and 'SSP Disqualification'.

Absence Data page

Note. Many of the fields on this page are identical to those on the Absence Event Entry Detail page. You'll find documentation for these fields in the *PeopleSoft Global Payroll PeopleBook*.

Absence Take	Select the type of absence that you require: <i>SSP AT1 Statutory Sick Pay</i> , <i>SMP AT1 Statutory Maternity Pay</i> , <i>OSP AT1 Occupational Sick Pay</i> , and <i>OMP AT1 Occupational Maternity Pay</i> .
Partial Hours	If you enter any partial hours during an employee's absence (including the first, last, or all days), then that day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP won't be paid for that day. This applies regardless of the number of hours entered in the Partial Hours field.
Or Half Day	If you select this check box during the absence (the first, last, or all days), then the day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP is not paid for that day.
Or Apply to All Days	If you select this check box during the absence (the first, last, or all days), then the day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP is not paid for that day.
Absence Type	Select an absence type that you defined on the Absence Reasons page.

Absence Code	Select an absence code that you defined on the Absence Reasons page.
Reason	Enter an additional reason why an employee was absent from work.
Paid Unpaid	The system sets the payment to Paid. This field doesn't affect the calculation of the statutory schemes delivered as part of PeopleSoft Global Payroll for the UK. You might want to use it when setting up your own absence schemes, to determine whether the absence is paid or unpaid.
SSP Disqualification	Click to access the SSP Disqualification Details page.
Notification of Absence	Click to access the Notification of Absence page.
Absence Certificate Details	Click to access the Absence Certificate Details page.
Process Details	Click to access the Process Details page.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Absence Entry and Processing,” Entering Updating, and Voiding Absence Events

Recording Dates and Reasons for Disqualification

Access the SSP Disqualification Details page

SSP Disqualification Details

Date of Disqualification:

Reason for Disqualification:

OK

Cancel

SSP Disqualification Details page

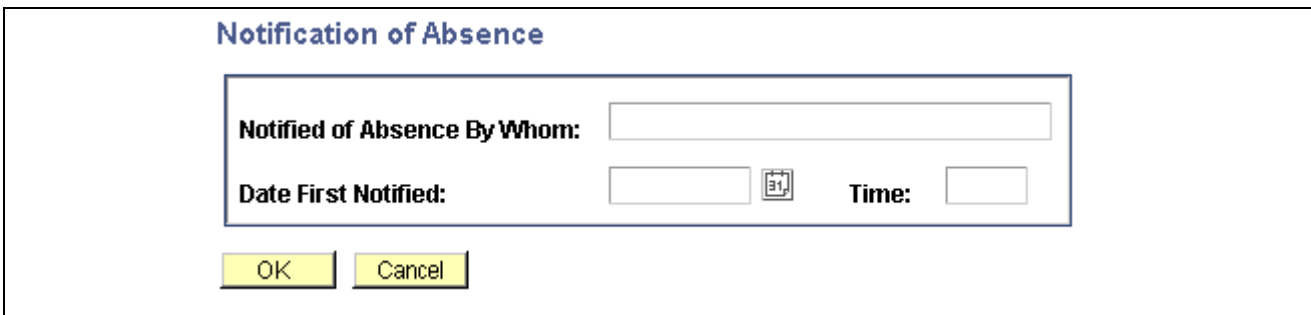
Disqualification is due to reasons beyond the scope of PeopleSoft Global Payroll for the UK. SSP is not payable for employees who are on strike, for example. Because PeopleSoft Global Payroll cannot know whether an employee is on strike, this facility prevents SSP from being paid from the date that you specify.

PeopleSoft Global Payroll for the UK takes into account the rules governing SSP disqualification. If an employee is disqualified from SSP for whatever reason, then all absences within 56 days of the end of that absence are also disqualified.

Date of Disqualification	Select the date when the employee disqualified for SSP.
Reason for Disqualification	Enter the reason why an employee is disqualified for SSP.


Recording Notification of Absences

Access the Notification of Absence page.



Notification of Absence

Notified of Absence By Whom:

Date First Notified:  Time:

Notification of Absence page

Notified of Absence By Whom Enter the name or relationship of the person who notified you of the employee's absence.

Date First Notified Select the date when you were first notified of the employee's absence.

Time Enter the time when you were notified of the employee's absence.

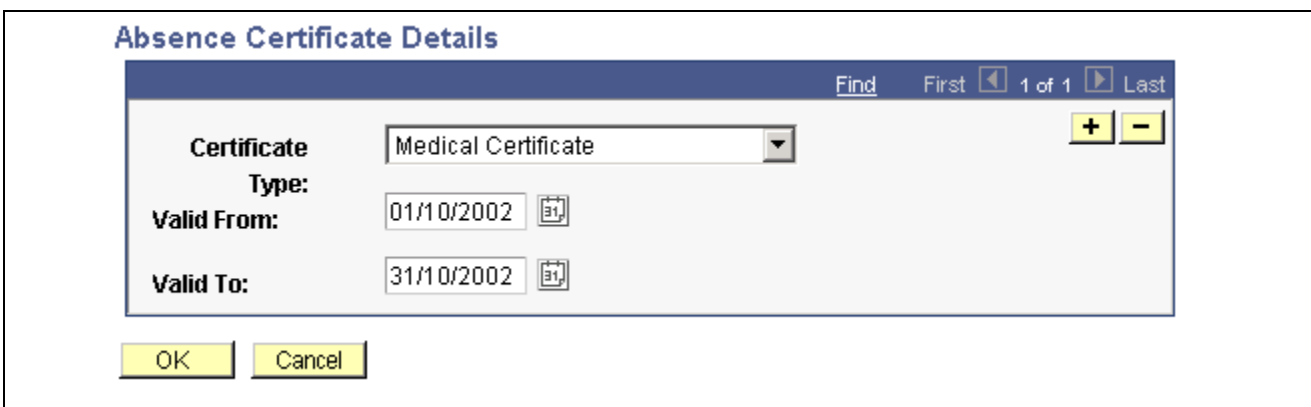
Note. In the UK, statutory rules state that an employee must meet the notification and certificate criteria as defined by a company in order to be eligible for SSP. For SSP, PeopleSoft Global Payroll for the UK includes the formula SSP FM USER COND. You may edit this formula to include your company's additional criteria, such as notification of absence, that an employee must meet before SSP can be paid.

See Also



PeopleSoft 8.8 Global Payroll PeopleBook, "Defining Calculation Elements," Defining Formula Elements




Recording Absence Certificate Details


Access the Absence Certificate Details page.




Absence Certificate Details

Find First  1 of 1  Last

Certificate Type:   

Valid From: 

Valid To: 

Absence Certificate Details page

Certificate Type Select the type of certificate that the employee holds: *Medical Certificate* and *Self Certificate*.

Note. In the UK, statutory rules state that an employee must meet the notification and certificate criteria as defined by a company in order to be eligible for SSP. For SSP, PeopleSoft Global Payroll for the UK includes the formula SSP FM USER COND. You may edit this formula to include your company’s additional criteria, such as absence certificate details that an employee must meet, before SSP can be paid.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Calculation Elements,” Defining Formula Elements

Viewing Process Details

Access the Process Details page.

Process Details

Calendar Group ID:

Date of last update:

Process Date:

OK


Cancel

Process Details page

Calendar Group ID	The calendar group ID in which the absence was last processed.
Date of last update	The date when the absence was last updated.
Process Date	The date when the absence was last processed.

Additional Information Page

Access the Additional Information page.

Absence Data		Additional Information		Comments	
Campbell, Elaine		ID: KG0006		Empl Rcd#: 0	
Absence Data		Find View All First 1 of 1 Last			
Absence Take:	SSP AT1		Statutory Sick Pay		
Begin Date:	01/10/2002				
End Date:	31/10/2002				
Additional Information					
<input type="checkbox"/> Doctor Consulted	Consultation Date:		<input type="text"/>		
<input type="checkbox"/> Work Injury Related	Incident Number:		<input type="text"/>		
<input type="checkbox"/> Refer to Occ. Health Auth.					
<input type="checkbox"/> Counselling					
<input type="checkbox"/> Disciplinary					
<input type="checkbox"/> Pregnancy Related Illness					
User Defined Fields Override/Adjust Entitlement Override Average Earnings Maternity Dates Override/Adjust Entitlement for Mapped to Scheme					

Additional Information page

Absence Type The absence type that you selected on the Absence Data page.

Begin Date The start date that you entered on the Absence Data page.

End Date The end date that you entered on the Absence Data page.

Additional Information

Doctor Consulted Select this check box if the employee has consulted his or her doctor.

Consultation Date Select the date when the employee consulted his or her doctor.

Work Injury Related Select this check box if it applies to the employee's absence.

Incident Number Enter the incident number if an employee has a work related injury.

Refer to Occ. Health Auth. (refer to occupational health authority) Select this check box if this applies to the employee's absence.

Counselling Select this check box if it applies to the employee's absence.

Disciplinary Select this check box if it applies to the employee's absence.

Pregnancy Related Illness Select this check box if it applies to the employee's absence.

Note. According to UK legislation, the start of the MPP is affected if an employee is absent with a pregnancy-related illness on or after the beginning of the sixth week before the EWC.

- User Defined FieldsClick to access the User Defined Fields page.
- Override/Adjust EntitlementClick to access the Override/Adjust Entitlement page.
- Override Average EarningsClick to access the Override Average Earnings page.
- Maternity DatesClick to access the Maternity Dates page.
- Override/Adjust Entitlement for Mapped to SchemeClick to access the Override/Adjust Entitlement for Mapped to Scheme page.

See Also

Chapter 12, “Entering Employee Absences,” Entering Additional Information About SSP and SMP, page 71

Defining Additional Information Fields

Access the User Defined Fields page.

User Defined Fields

	Date	Decimal	Character	Monetary	Currency
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OKCancel

User Defined Fields page

User Defined Fields

You can create your own fields to further define an absence. Possible field types are *Date*, *Decimal*, *Character*, and *Monetary*. If you create a monetary field, you must specify the *Currency*.

Changing Entitlements for Absence Schemes

Access the Override/Adjust Entitlement page.

Override/Adjust Entitlement

Entitlement: Adjustment:

OK Cancel

Override/Adjust Entitlement page

Entitlement

Enter the number of days or weeks by which you want to override entitlement. For example, if a new employee gives you a leaver's statement (form SSP1(L)) completed by a former employer and the employee has used five weeks of SSP, enter 23 in the Override Entitlement field, (28 weeks statutory entitlement minus 5 weeks of SSP used).

Note. Statutory absence schemes are defined as weeks. If you define your own absence schemes, definitions may vary. For example, if you define an absence scheme, such as holiday entitlement, the definition is probably in terms of days.

Adjustment

Enter the number of days or weeks by which you want to adjust entitlement. If a new employee gives you a leaver's statement (form SSP1(L)) completed by a former employer and the employee has used five weeks of SSP, enter -5 in the Adjust Entitlement field.

Overriding Employee Average Earnings

Access the Override Average Earnings page.

Override Average Earnings

Statutory Average Earnings:

Occupational Average Earnings:

OK Cancel

Override Average Earnings page

Statutory Average Earnings

Enter the amount that you want to apply as the statutory average earnings. For example, if you have a new starter with no earnings, enter the contractual amount that was calculated.

Occupational Average Earnings

Enter the amount that you want to apply as the occupational average earnings.

Note. Because you may require your occupational average earnings to be different from your statutory average earnings. PeopleSoft Global Payroll for the UK provides you with two fields. You may use them for OSP schemes where the amount of pay depends on past earnings. For example, a shift worker is usually paid a combination of basic pay and overtime. If that employee is off sick, you can use the Occupational Average Earnings field to enter the employee’s overtime payments. This ensures that SSP compensates for both the employee’s basic pay and the overtime that he or she would normally have worked.

Recording EWC Data

Access the Maternity Dates page.

Maternity Dates

Actual Week of Confinement:

Expected Week of Confinement:

05/08/2002

OK

Cancel

Maternity Dates page

Actual Week of Confinement

Enter the date of the Sunday in the week when the baby was born. For example, if the baby was born on Tuesday 5 September 2000, the actual week of confinement is Sunday 3 September 2000.

Expected Week of Confinement

Enter the date of the Sunday in the week before the baby is due.

Note. This date must match the one calculated by Monitor Absence in PeopleSoft Human Resources .

Overriding Entitlement for Schemes Mapped in Core Application

Access the Override/Adjust Entitlement for Mapped to Scheme page.

Override/Adjust Entitlement for Mapped to Scheme

Entitlement:

Adjustment:

5

OK

Cancel

Override/Adjust Entitlement for Mapped to Scheme page

Note. The fields on this page are identical to those on the Override/Adjust Entitlement page.

See Also

Chapter 12, “Entering Employee Absences,” Changing Entitlements for Absence Schemes, page 68

Entering Additional Information About SSP and SMP

The following section explains how PeopleSoft Global Payroll for the UK handles certain conditions regarding SSP and SMP.

Processing SMP and Stillbirths

This section, SMP and Stillbirths, describes how you process stillbirths using PeopleSoft Global Payroll for the UK.

Entitlement Condition	Resolution	Comments
Baby is stillborn <i>after</i> the start of the 16 th week prior to the EWC.	SMP must be paid as normal.	It is a statutory requirement that the employee be paid SMP, as for a live birth. You do not have to record details of the stillbirth in PeopleSoft Global Payroll for the UK because SMP is paid as normal.
Baby is stillborn <i>before</i> the 25 th week of pregnancy; that is, baby is stillborn earlier than the 16 th week prior to the EWC.	The employee is not eligible for Statutory Maternity Pay. Clear the Eligible for Maternity Pay Based on Employment Conditions option on the UK Maternity Leave page in PeopleSoft Human Resources.	If the employee is absent from work, you may want to record this as an SSP absence on the Absence Data page (do not select Pregnancy Related Illness on the Additional Information page). You may also want to make a relevant comment on the Comments page.

Note. This is a manual procedure; there is no check box to record stillbirths. This decision was based on the fact that stillbirths are an emotive issue and occur relatively infrequently.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: *Monitor Absence*, “(GBR) Tracking Maternity and Parental Leave”

Additional SSP and SMP Entitlement Conditions

The following table explains how the system handles different SSP and SMP entitlement conditions.

Entitlement Condition	Resolution	Comments
Absence is entered after an employee's termination date. (SSP)	The system displays a warning on the Absence Data page.	The employee is not paid SSP.
Absence start date is more than 11 weeks before the EWC. (SMP)	The system displays a warning on the Absence Data page.	The employee is paid SMP as the system assumes that the birth is premature.
An employee is sick on the hire date. (SSP)	The system displays a warning on the Absence Data page.	If you enter an absence, PeopleSoft Global Payroll for the UK assumes that the employee has done some work for the employer and SSP must be paid.
An employee works part of a day during an absence. (SSP and SMP)	None.	SSP is not paid for any part day that an employee has worked.
Average weekly income is less than the LEL. (SSP and SMP)	PeopleSoft Global Payroll for the UK calculates the employee's average earnings and override is included on the page.	If average earnings are below the LEL, SSP and SMP are not paid.
Birth occurs before the date that the employer was notified, or no notification has been given. (SMP)	PeopleSoft Global Payroll for the UK does not pay SMP unless you enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.	The employee must notify the employer of the actual date of the birth and the expected date of the birth.
Employee is in continuous employment for 26 weeks prior to and including the Qualifying Week. (SMP)	Select the Eligible for Maternity based on Employment Conditions check box on the UK Maternity Leave page in PeopleSoft Human Resources.	If the employee has not been in continuous employment for the qualifying period, leave the check box unselected. SMP is paid only for an employee if you select this check box.
Employee is over 65 or under 16 at start of PIW. (SSP)	The system displays a warning on the Absence Data page in the core application.	The employee is not paid SSP.

Entitlement Condition	Resolution	Comments
No MATB1 form. (SMP)	PeopleSoft Global Payroll for the UK does not pay SMP unless you enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.	Enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.
No notification of absence 28 days after the birth. (SMP)	The system displays a warning on the UK Maternity Leave page if you do not enter a date in the Form MATB1 Received field on the UK Maternity Leave page.	Enter a date in the Form MATB1 Received field on the UK Maternity Leave page.
PIW spans over three years. (SSP)	None.	PeopleSoft Global Payroll for the UK does not pay SSP on the date when the PIW reaches the three-year mark.
PRI within six weeks prior to the EWC. (SMP)	The system displays a warning message if you enter an SSP absence within 6 weeks of the EWC.	PeopleSoft Global Payroll for the UK does not pay SSP if the absence is pregnancy related and within six weeks of the EWC.
	The system displays a warning on the Absence Data page.	PeopleSoft Global Payroll for the UK does not pay SSP. It calculates the maternity disqualifying period by taking the date entered in the MPP Actual Start Date field on the UK Maternity Leave page and adding 18 weeks.

Viewing Employee Absence Data

PeopleSoft Global Payroll for the UK enables you to view information on absence exceptions, dates, and absence payments, as well as additional details about a payee's absence.

Pages Used to View Absence Details

Page Name	Object Name	Navigation	Usage
Payee Absence Exceptions	GPGB_ABS_EXCEP	Global Payroll, Payee Data, Maintain Absences, Review Absence Exceptions GBR	View absence exceptions, absence dates, and payment details for your payees
Absence Data	GPGB_ABS_EXCEP_SP	Click the Detail link on the Payee Absence Exceptions page.	View additional details about a payee's absence.

Viewing Absence Exceptions, Absence Dates, and Payment Details

Access the Payee Absence Exceptions page.

Payee Absence Exceptions

Calendar Group ID: GGAM2000-12 **IMIS PAY & ABS** **Country:** GBR

Payee Exceptions Customize | Find | View All | First 1-3 of 3 Last

Exception Details | Absence Dates | Payment Details

EmplID	Name	Empl Rcd#	Description	Detail
GGAM-011	Carter, Colin	0	Calculated Average Weekly Earnings For Employee 563.2	Detail
GGAM-014	Rice, Rachel	0	The Employee's Average Weekly Earnings 146 are Below the LEL	Detail
GGAM-019	Moore, Mike	0	Statutory Average Earnings 0 has been overridden by 73.39	Detail

Payee Absence Exceptions page: Exception Details tab

Exception Details Tab

The Exception Details tab displays the EmplID, Name, EmplRcd#, and an absence Description for each absent payee in the calendar group identified in the Calendar Group ID field. If you want to view additional details of a payee's absence, click the Detail link, which takes you to the Absence Data page.

Absence Dates Tab

Access the Absence Dates tab.

Payee Exceptions Customize | Find | View All | First 1-3 of 3 Last

Exception Details | **Absence Dates** | Payment Details

Absence Start Date	Absence End Date	Disqualification Date
11/03/2001	11/08/2001	
13/03/2001	17/03/2001	

Payee Absence Exceptions page: Absence Dates tab

The Absence Dates tab displays the Absence Start Date, Absence End Date, and the Disqualification Date for each payee absence.

Payment Details Tab

Access the Absence Dates tab.

Payee Exceptions			
Customize Find View All First 1-3 of 3 Last			
Exception Details	Absence Dates	Payment Details	
Calendar Group ID	Calendar ID	Pay Group	Segment Number
GGAM2000-12	GGSSP2000-12	GGMABSENCE	1
GGAM2000-12	GGSMP2000-12	GGMABSENCE	1
GGAM2000-12	GGSSP2000-12	GGMABSENCE	1

Payee Absence Exceptions page: Payment Details tab

The Payment Details tab displays the Calendar Group ID, Calendar ID, Pay Group, pay period, and segment Number for each absence payment.

Viewing Absence Details

Access the Absence Data page.

Absence Data

Message Set Number: 17135 **Message Number:** 311

Description:

Explanation:

Absence Data page

Message Set Number	This is the message set containing the messages (text) displayed in the Description and Explanation fields.
Message Number	This is the message number corresponding to the content in the Description and Explanation fields.
Description	This field displays a description of the absence. The description is defined in the message catalog.
Explanation	This field contains an explanation of the absence. The explanation is defined in the message catalog.

CHAPTER 13

Calculating Net-to-Gross Payments for the UK

This chapter provides an overview of how to:

- Set up net-to-gross calculations for an earnings.
- Store the grossed-up result.
- Enter net-to-gross payments.

Setting Up Net-to-Gross Calculations for an Earnings

Some earnings, such as bonuses, are paid as net amounts, so you must calculate the corresponding gross amounts. For example, if you want to pay your employee a one-time bonus of £100, you can use PeopleSoft Global Payroll for the UK to calculate the gross payment, which ensures that the employee receives £100 after taxes and National Insurance contributions have been deducted.

Note. If you want to make net-to-gross payments that are subject to tax only or to National Insurance only, you must build your own net-to-gross process.

Set up net-to-gross payments for the UK in the core application using elements that are specific to PeopleSoft Global Payroll for the UK. There are no specific pages in PeopleSoft Global Payroll for the UK for setting up net-to-gross payments.

To set up net-to-gross calculations for an earnings:

1. Define the earning that stores the net payment to be grossed-up on the Earnings Name page in the core application.

PeopleSoft Global Payroll for the UK is delivered with earning GU ER TAXNI, which you can use for payments that are liable for both tax and National Insurance contributions. If you want the net amount that you enter to be liable for either tax only or National Insurance only, you must create your own earning. This earning is a member of the GU AC GRSUP SEG accumulator.

2. Define the earning that stores the grossed-up result of the net-to-gross process on the Earnings Name page in the core application.

PeopleSoft Global Payroll for the UK delivers earning GU ER RESULT, which stores the grossed-up result in the core application. This earning is a member of the following accumulators: GU AC ALLPAY and GU AC TAXABLE.

Note. If you have created a net-to-gross earning that is subject to either tax only or National Insurance contributions only, you must create an additional earning that stores the corresponding grossed-up result.

3. Add both earnings to the earnings element group on the Element Groups – Members page in the core application.

Note. PeopleSoft Global Payroll for the UK provides you with element group GBR EG ALLPAY, which contains both of these earnings. If you create your own earnings in Steps 1 and 2, you must add them to an element group.

4. Set up the necessary formulae to calculate the grossed-up amount on the Formula Name Page in the core application.

PeopleSoft delivers the following formulas, which calculate the grossed-up amount:

- GU FM 2: This formula determines the net amount to be grossed-up and provides the process with a first resolution for the gross amount.
 - GU FM 3: This formula is responsible for the iterative processing that calculates the actual gross amount.
 - GU FM 4: This formula populates the element GU VR RESULT, which displays the results of the net-to-gross process.
5. Set up a net-to-gross section, where all earnings are processed, on the Definition page in the core application.

PeopleSoft Global Payroll for the UK delivers the section GBR SE NTG, which includes the net-to-gross earnings, the grossed-up earnings, and the formulas that the system processes.

Section GBR SE NTG references both the net payment earnings and the grossed-up result earnings, as well as the GU FM 2, GU FM 3, and GU FM 4 formulas.

GBR SE NTG is defined as a subprocess, with a maximum number of 15 iterations. If you are defining your own net-to-gross process, you can amend the number of iterations accordingly.

Warning! Do not change the delivered formulas and/or sections. Doing so may impact statutory calculations. If you create your own net-to-gross process, discuss this with your PeopleSoft consultant.

6. Add the net-to-gross section to the process list component on the Definition page in the core application.

PeopleSoft Global Payroll for the UK is delivered with section GBR SE NTG in the GBR PR PAYROLL process list. The position of the section in the process list is important: You must place the process list prior to the tax and National Insurance processing so that the grossed-up amount can be derived before tax and National Insurance are calculated.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements,” Overview of Earnings and Deduction Elements

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining the Organizational Structure,” Defining Element Groups

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Calculation Elements,” Defining Formula Elements

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Processing Elements,” Using Sections

Entering Net-to-Gross Payments

Set up the various components for resolving net-to-gross processing on the core pages. On the Positive Input page, enter the amount to be gross-up in the Amount field. In the Currency Code field, enter *GBP* as the currency.

Note. Use the pages in the core application to enter net-to-gross payments. There are no UK-specific pages in PeopleSoft Global Payroll.

PeopleSoft Global Payroll for the UK delivers element GU ER TAXNI, which is subject to both tax and National Insurance contributions. This element was defined so that the amount can be entered as Positive Input in the core application.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Working With Positive Input,” Pages

PeopleSoft 8.8 Global Payroll PeopleBook, “Working With Positive Input,” Eligibility Rules for Positive Input

CHAPTER 14

Defining Payslip Messages

This chapter explains how to include message on employees' payslips.

Prerequisites

Before you can define messages for payslips, you must:

1. Define the elements that appear on the payslips.
2. Assign payslips to pay groups.

See Also

[Chapter 5, "Setting Up Payslips for the UK," page 21](#)

Including Messages on Payslips

PeopleSoft Global Payroll for the UK enables you to send a payslip message to all the employees in a pay group, or to create personal messages for individual payees.

Pages Used to Include Messages on Payslips

Page Name	Object Name	Navigation	Usage
Payslip Message by Pay Group	GPGB_MESS_GRP	<ul style="list-style-type: none">• Global Payroll, Payslips, Add Payslip Messages GBR• Set Up HRMS, Product Related, Global Payroll, Payslips, Messages by Pay Group GBR	Include messages on the payslips for all employees who belong to a specific pay group.
Payslip Messages by Employee	GPGB_MESS_EE	Global Payroll, Payee Data, Payslips, Create Message GBR	Include messages on the payslip for a specific employee.

Defining Messages for Employees in Specific Pay Groups

Access the Payslip Message by Pay Group page.

Pay Group: GGMAbsence IMIS Monthly Absence

Payslip Message Find | View All First 1 of 1 Last

*Payslip ID: GBPS UK Payslip for all Paygroups + -

Effective Date: 19/11/2002

Message Definition Find | View All First 1 of 1 Last

*Sequence:	Payslip Message:

Payslip Message by Pay Group page

Note. The Effective Date field displays all the messages for an employee or a pay group where the effective date is within the segment.

Payslip ID	Enter the payslip ID. You must have created a payslip first.
Sequence	Enter the order in which you want to display your messages.
Message	Enter the message that you want to display on the payslip. The message will be sent to all employees who belong to the pay group that you specified.

Defining Messages for Specific Employees

Access the Payslip Messages by Employee page.

Payslip Messages by Employee

Hopkins,Dewi ID: KG0002 Empl Rcd#: 0

Payslip Message Find | View All First ◀ 1 of 1 ▶ Last

*Payslip ID: GBPS UK Payslip for all Paygroups + -

*Effective Date: 19/11/2002 [Calendar Icon]

Message Definition Find | View All First ◀ 1 of 1 ▶ Last

*Sequence: Payslip Message: + -

Payslip Messages by Employee page

Note. The Effective Date field displays all the messages for an employee or a pay group where the effective date is within the segment.

Payslip ID	Select the payslip ID that you require.
Sequence	Enter the sequence in which you want to display your messages.
Message Text	Enter the message that you want to display on the payslip. The message will be sent only to the employee that you specify.

CHAPTER 15

Running the Banking Processes

Use PeopleSoft Global Payroll for the UK to facilitate your organisation's banking process. The banking feature in PeopleSoft Global Payroll is optional. If you decide to use this feature, first define the banking pages in the Global Payroll core application.

This chapter provides an overview of PeopleSoft Global Payroll for the UK banking and describes the UK-specific processes.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Banks and Bank Branches,” (GBR) Setting Up UK Banks and Building Societies

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Banking Instructions”

Overview of PeopleSoft Global Payroll for the UK Banking

Once you have finalised a pay run, run the PeopleSoft Global Payroll Core banking process. This banking process has two steps: calculate and finalise. Run the calculate step any number of times, but the finalise step only once.

Once you have run the core banking process, run these processes provided in PeopleSoft Global Payroll for the UK:

- Banking process GBR.

This process creates a UK-specific table, GPGB_PAYMENT, that contains basic calendar run information and the transaction and bank data necessary to create a file for BACS-processing software.

- Create BACS File process

This process transfers the data from GPGB_PAYMENT, for a given calendar run ID, into a fixed-length file on disk suitable for BACS transmission.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Banking Instructions”

Pages Used in the Banking Process

Page Name	Object Name	Navigation	Usage
Banking Payment	GPGB_PAYMENT	Global Payroll, Payment Processing, Run Banking Process GBR	Run the UK-specific banking process that creates the GPGB_PAYMENT table. Run this process after running the Global Payroll Core banking process.
Payment File Generation	GPGB_BANK_EFT	Global Payroll, Payment Processing, Create BACS File GBR	Create a fixed-length ASCII file that can be used as input to BACS processing software. The system displays as valid values only those calendar run IDs that have had the banking finalise step run.

Creating a file for BACS Transmission

Access the Payment File Generation page.

Payment File Generation

Run Control ID: 01
 [Report Manager](#)
[Process Monitor](#)

Calendar Group ID:

Pay Entity:

***EFT File Name:**

Payment File Generation page

EFT File Name (electronic file transfer file name) Enter the name of the EFT file that you want to create.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Banking Instructions”

CHAPTER 16

Managing End of Year Submissions to the Inland Revenue

This chapter explains how to run the following processes:

- End of Year Return.
- Pay/Pension Identity Number.
- Code Number Changes.

Understanding the End of Year Processes

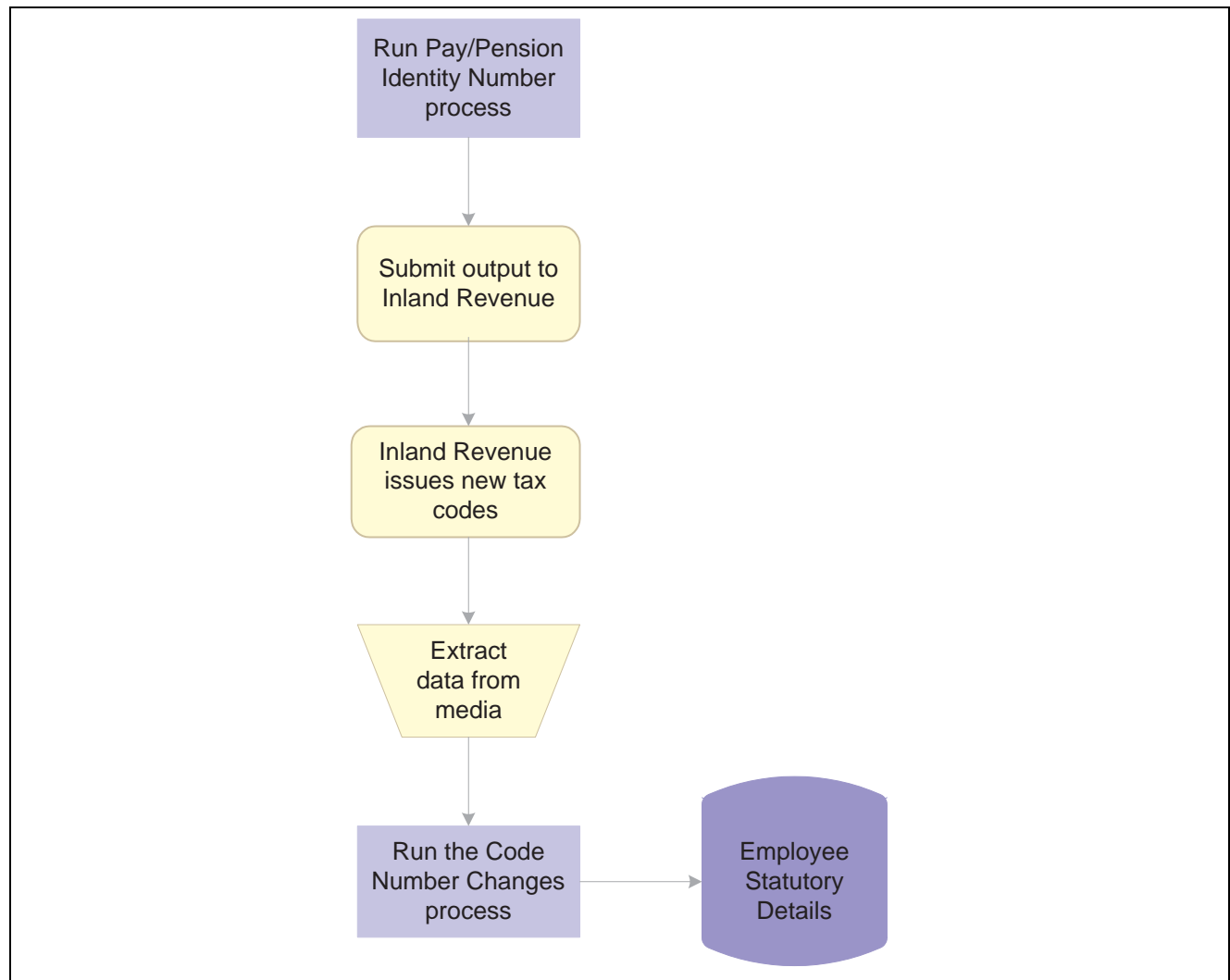
PeopleSoft Global Payroll for the UK delivers the following processes for handling end of year submissions to the Inland Revenue and subsequent updates to your PeopleSoft database:

Process Name	Process ID	Usage
End of Year Return	GPGB_EOYR	Produces an electronic version of the P14 and P35 reports.
Pay/Pension Identity Number	GPGB_PPIN	Generates an employee listing that is submitted to the Inland Revenue for tax code processing purposes.
Code Number Changes	GPGB_CNC	Updates employees' tax codes based on data received from the Inland Revenue.

Tax Code Updates

At the end of every tax year, the Inland Revenue calculates employees' tax codes for the next tax year. The Pay/Pension Identity Number and Code Number Changes processes enable you to submit information to the Inland Revenue and receive updated tax codes electronically.

The following diagram outlines the process:



Process for Updating Tax Codes

Directory Used by the End of Year Processes

All the processes use the following PeopleTools directory on the machine where your Process Scheduler runs: `%PS_SERVDIR%\files`

This directory is used as follows:

- The files generated by the End of Year Return and Pay/Pension Identity Number processes are stored in this directory.
- The Code Number Changes process searches this directory for the data file you received from the Inland Revenue. The process also creates a log file and error file in the same directory.

Prerequisites

Before you run the end of year processes, ensure you:

- Define Inland Revenue reference information for each pay entity.

The end of year processes require information such as the Inland Revenue tax district and PAYE reference number. Enter this information on the Pay Entity Details page.

- Understand the Inland Revenue's technical requirements and submission procedures.

See Also

Chapter 3, "Setting Up Country Data," Defining Pay Entity Details, page 12

Inland Revenue Technical Guide "Submitting Year End Returns on Magnetic Media" – Reference CA51/52

Inland Revenue Submission Instructions and Technical Specifications "Updating of Pay/Pension Identity Numbers" – Reference MT3

Inland Revenue Submission Instructions and Technical Specifications "Code Number Changes on Magnetic Media" – Reference MT1

Generating End of Year Returns

At the end of every tax year, employers submit certain information to the Inland Revenue about their employees, including details of National Insurance Contributions, pay, and income tax.

This information is submitted in hard copy, using P14 and P35 schedules, or electronically. PeopleSoft Global Payroll supports two options for generating year end returns:

- P14 and P35 reports
- End of Year Return process

This process generates an output file that you copy to magnetic media (flexible diskette, open reel tape, or data cartridge) and submit to the Inland Revenue.

Note. PeopleSoft's End of Year Return process produces an output file that conforms to the Inland Revenue formatting requirements.

See Also

Chapter 17, "Running Payroll Reports," page 101

Prerequisites

Before you run the End of Year Returns process, you must:

- Finalize your payroll data for the tax year. Do not create the year end returns until you have run and finalized the last payroll for the tax year.
- Obtain a permit number from the Inland Revenue for each pay entity. Permit numbers are detailed in the Inland Revenue guidelines.

Warning! You should understand the Inland Revenue’s technical requirements and process for year end submission before you run the PeopleSoft year end return process, or submit the output to the Inland Revenue.

See Also

Inland Revenue Technical Guide “Submitting Year End Returns on Magnetic Media” – Reference CA51/52
PeopleSoft 8.8 Global Payroll PeopleBook, “Payroll Processing”
Chapter 3, “Setting Up Country Data,” Defining Pay Entity Details, page 12

Page Used to Run the End of Year Return Process

Page Name	Object Name	Navigation	Usage
End of Year Return	GPGB_RNCTL_EOYR	Global Payroll, Year-End Processing, End of Year Return GBR	Run the End of Year Return process.

Running the End of Year Returns Process

Access the End of Year Return page.

End of Year Return

Run Control ID: GN2

Language: English

Tax Year Begins In: 2002

Pay Entity: GGPE01

Filename:

☐ Subtotal By Paygroup

EOYR Submission Type

☐ Data Cartridge

☐ Flexible Diskette

☒ Magnetic Tape

Report Manager

Process Monitor

Run

End of Year Return page

- Tax Year Begins In

Enter the year for the start of the tax year.
- Pay Entity

Select the pay entity for which you want to create the year end return.

Note. Pay entity tax details must exist for the pay entity before you can run the process. Use the Pay Entity Details page to define this information.

Filename	Enter the name of the output file. Refer to the Inland Revenue guidelines for filenaming conventions.
Subtotal By Paygroup	Select this check box if you want the output file to include a subtotal record for each pay group.
EOYR Submission Type	Select the media you're using to submit the end of year return.

See Also

Inland Revenue Technical Guide "Submitting Year End Returns on Magnetic Media" – Reference CA51/52

Submitting the End of Year Return

Once you have successfully run the End of Year Returns process, you need to:

1. Prepare your magnetic media.
The Inland Revenue guidelines specify the types of media accepted and the format of information for each media type.
2. Copy the file generated by the End of Year Return process to the prepared media.
The End of Year Return process creates an output file in the %PS_SERVDIR%\files directory on the machine where your Process Scheduler runs.

See Also

Inland Revenue Technical Guide "Submitting Year End Returns on Magnetic Media" – Reference CA51/52

Reporting Pay/Pension Numbers

As part of the process for updating employees' tax codes, the Inland Revenue requires employers to submit a list of their employees, including the following information:

- Employee name.
- Employee NI number.
- Employee ID.

The Pay/Pension Numbers process creates a file containing this information, formatted to the Inland Revenue requirements.

See Also

Inland Revenue Submission Instructions and Technical Specifications "Updating of Pay/Pension Identity Numbers" – Reference MT3

Chapter 16, "Managing End of Year Submissions to the Inland Revenue," Tax Code Updates, page 87

Page Used to Run the Pay/Pension Process

Page Name	Object Name	Navigation	Usage
Pay/Pension Numbers	GPGB_PPIN_FL	Global Payroll, Social Security/Insurance, MT3 — Pay/Pension Numbers GBR	Run the Pay/Pension Numbers process.

Running the Pay/Pension Numbers Process

Access the Pay/Pension Numbers page.

Pay/Pension Numbers

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Pay Entity: GGPE01 GBR Pay Entity 01

*Output Filename:

Pay/Pension Numbers page

Pay Entity

Select the pay entity you want to process.

Note. You must set up the tax district and Inland Revenue reference numbers associated with this pay entity before you run this process. Use the Pay Entity Details page to define these tax details.

Output Filename

Enter the name for the output file. Refer to the Inland Revenue guidelines for filenaming conventions.

See Also

Chapter 3, “Setting Up Country Data,” Defining Pay Entity Details, page 12

Inland Revenue Submission Instructions and Technical Specifications “Updating of Pay/Pension Identity Numbers” – Reference MT3

Submitting the Pay/Pension Identity Numbers Data

Once you have successfully run the Pay/Pension Numbers process, you need to:

1. Prepare your magnetic media.

The Inland Revenue guidelines specify the types of media accepted and the format of information for each media type.

2. Copy the file generated by the Pay/Pension Identity Numbers process to the prepared media.

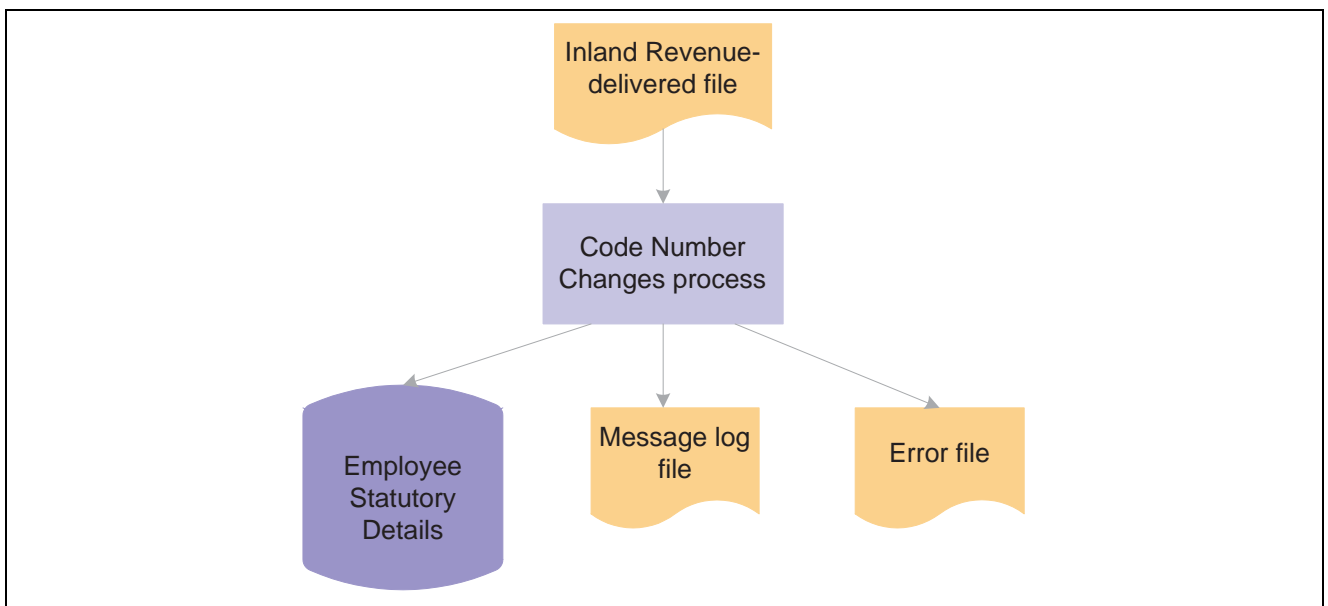
The process creates an output file in the %PS_SERVDIR%\files directory on the machine where your Process Scheduler runs.

Loading Tax Code Changes from the Inland Revenue

After processing the employee information that you submitted using the Pay/Pension Identity Numbers process, the Inland Revenue issues employees' new tax codes on magnetic tape.

Use the Code Number Changes process to load the updated tax codes into your PeopleSoft database. The process inserts a new row into the statutory details table for each employee listed in the file.

If any records could not be processed, the system adds an error message to a message log file and adds the data to an error file as illustrated below:



Code Number Changes process

You use the message log file and the error file to review the results and resolve issues with the data. To simplify this process, you make corrections in the error file and not in the original Inland Revenue-delivered file.

The error file format meets Inland Revenue format requirements so you can use the corrected error file as input if you need to rerun the process.

See Also

Chapter 16, “Managing End of Year Submissions to the Inland Revenue,” Tax Code Updates, page 87

Inland Revenue Submission Instructions and Technical Specifications “Code Number Changes on Magnetic Media” – Reference MT1

Prerequisites

Before you run the Code Number Changes process, do the following:

1. Extract the data from the Inland Revenue tape and copy the file to the %PS_SERVDIR%\files directory.
The specification of the tape and the format of the records are detailed in the Inland Revenue documentation.

After you've extracted the file, check that the format is correct. The Code Number Changes process is designed to work with files that match the Inland Revenue specification only.

Note. The filename can be up to a maximum of 20 characters long.

2. Check your statutory details table for rows with an effective date that conflicts with the tax code effective date.

When you run the Code Number Changes process, you specify the effective date for the new rows inserted into the statutory details table (this is known as the uplift date). If the process encounters a row with an effective date that is equal to or later than the uplift date, it can't insert the new tax code and adds an error message to a log file.

This problem occurs if, for example, the Inland Revenue issue a notice of tax code change for an individual employee that you have manually entered into the system. In this case, you need to check which tax code is correct.

To avoid this problem, it is recommended that you check for rows in the statutory details table with an effective date equal to or later than the uplift date. The following SQL query returns any such rows (replace uplift_date with the actual date):

```
SELECT  EMPLID, TAXCODE_UK, EFFDT
        FROM    PS_GPGB_EE_STDTLS
        WHERE EFFDT >= uplift_date
```

It is not mandatory that you resolve problems with effective date conflicts before you run the process. However, if you don't, the process will not be able to insert new rows for the employees with the conflicting dates.

If there are a small number of employees with date conflicts you can run the process and resolve the conflicts after Code Number Changes has run.

See Also

Chapter 16, "Managing End of Year Submissions to the Inland Revenue," Understanding the End of Year Processes, page 87

Page Used to Run the Code Number Changes Process

Page Name	Object Name	Navigation	Usage
Code Number Change	GPGB_RUNCTL_CNC	Global Payroll, Taxes, MT1 — Code Number Changes GBR	Run the Code Number Changes process.

Running the Code Number Changes Process

Access the Code Number Change page.

Code Number Change

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English ▼

*Uplift Date: 01/05/2002

*Inland Revenue Flat File:

*Inland Revenue Error File:

*Message Log File:

Code Number Change page

Uplift Date

The effective date of the new rows that are inserted into the Statutory Details table. PeopleSoft Global Payroll for the UK uses employees' new tax codes in tax calculations from this date.

Inland Revenue Flat File

Enter the name of the file you copied from the Inland Revenue tape.

Note. This file must be in the %PS_SERVDIR%\files directory before you can run the Code Number Change process.

Inland Revenue Error File

Enter the name for the error log file.

Message Log File

Enter the name for the process log file.

Reviewing the Results and Rerunning the Process

After running the Code Number Change process, check the results of the process as follows:

1. Use the Process Monitor to check that the process has run successfully. View the process monitor log and trace file.

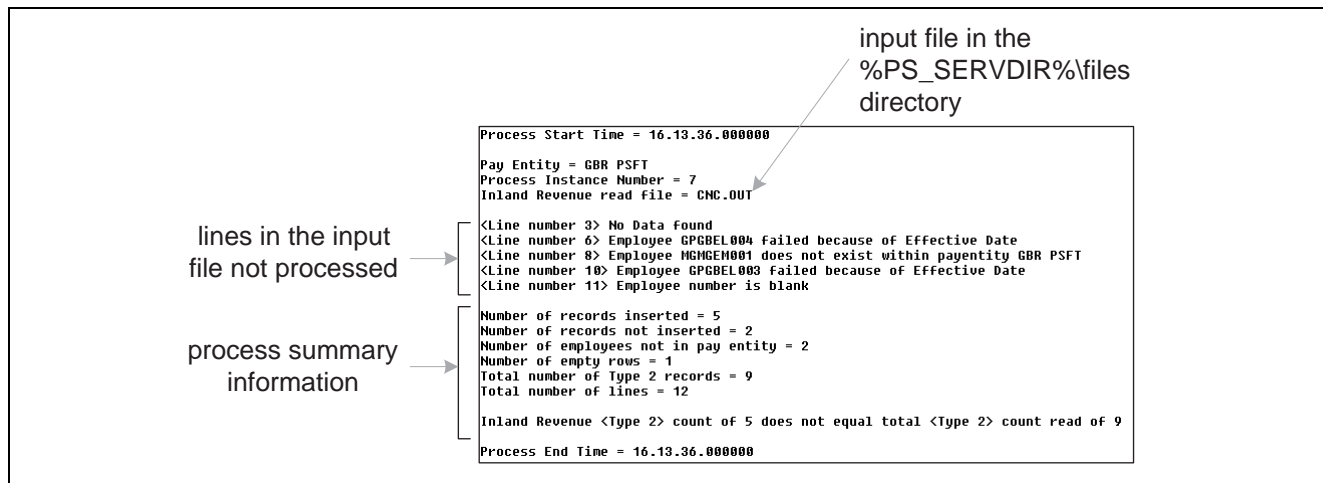
Note. It's important to check the process monitor log file even if you see a Success run status. If the process does not find the Inland Revenue flat file, it completes with a success status, but the log file shows the error "filename not found".

2. Check the message log file in the %PS_SERVDIR%\files directory. If there are errors, review the error messages and check the error file created.
3. Fix errors and rerun the Code Number Change process, if required.

Steps 2 and 3 are described in more detail in the sections that follow.

Reviewing the Message Log File

The following is an example of a message log file created by the Code Number Changes process:



Example Code Number Changes log file

Note. This section refers to the “input file”. This is the file you specified in the Inland Revenue Flat File field. If this is the first time you’ve run the process, the input file is the Inland Revenue-delivered file. If you’re rerunning the process, the input file is the corrected error file that contains unprocessed employees only. See the section Rerunning the Code Number Changes Process for more information.

The message log file lists:

- The lines in the input file that weren’t processed.
- Process summary information.

The following table lists the summary information provided and what you should expect to see if the process has run successfully.

Summary Data	Description	Expected Value
Number of records inserted	Number of records inserted into the statutory details table	If there are no errors in the data, this number should equal the Total Number of Type 2 Records.
Number of records not inserted	Number of records that can’t be updated because of effective date conflicts.	Zero
Number of employees not in pay entity	The lines in the input file with an emplID that isn’t in the pay entity.	Zero. If this value is not zero, the input file includes employee IDs that are either not valid or are included in a different pay entity.
Number of empty rows	Number of blank lines in the input file.	Not applicable. Blank lines are not processed.

Summary Data	Description	Expected Value
Total number of Type 2 records	Total number of employee records in the input file. This excludes blank lines.	This number should match the Number of records inserted.
Total number of lines	Total lines in the input file, including employee data, blank lines, and the header and footer information.	Not applicable.

For every line in the input file that was not processed, the message log file lists the:

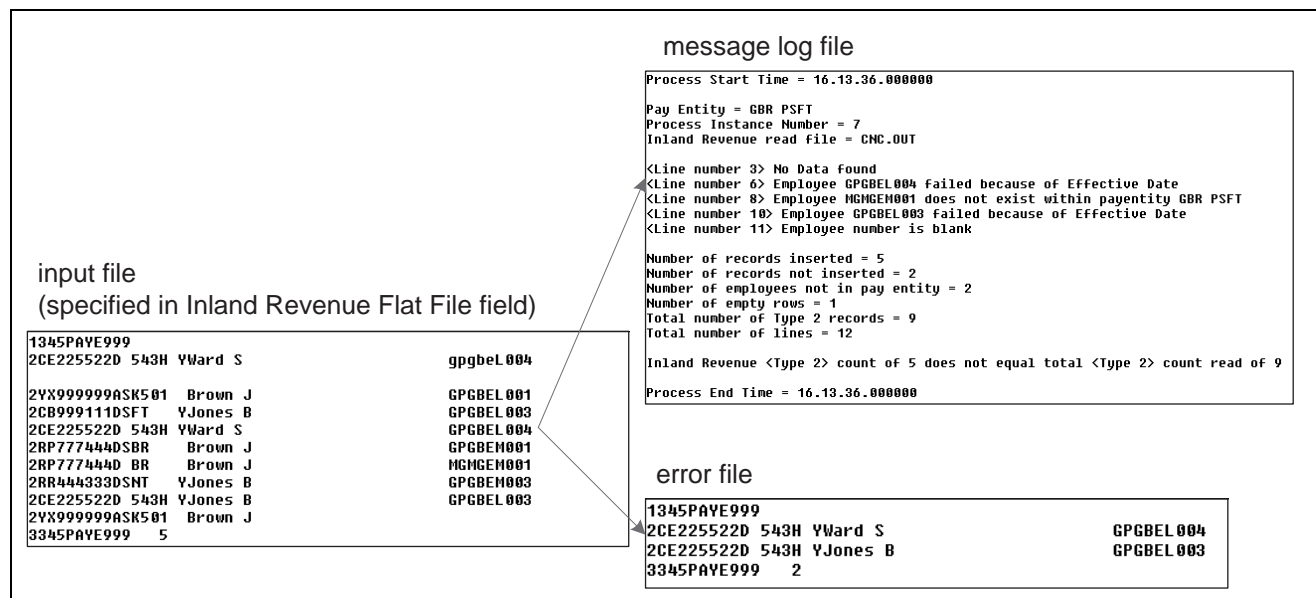
- Line number
- Error message

The following table lists the error messages and the reason for the errors:

Error Message	Reason
No Data found	A blank line in the input file. This doesn't stop the process completing successfully.
Employee emplID failed because of Effective Date	The employee specified has an existing row in the statutory details table with an effective date that conflicts with the uplift date. See Chapter 16, "Managing End of Year Submissions to the Inland Revenue," Running the Code Number Changes Process, page 95.
Employee emplID does not exist within payentity entity_name	The emplID specified is not in the pay entity being processed. Check whether it is a valid emplID.
Employee number is blank	The emplID is missing from the line. Check whether this is a valid employee for the pay entity being processed. If it is a valid employee, you need to add the emplID to the data in the error file.

Investigating Errors

The Code Number Changes process copies the lines of data that it couldn't process to the error file that you specified, as follows:



Example of the files created by the Code Number Change process

To investigate an error you can look at the input file or the error file. If this is the first time you've run the process, the input file is the Inland Revenue-delivered file which contains all your employees. It is easier to search the error file which contains unprocessed data only. However, remember that the line number in the log file refers to the input file.

Do not update the Inland Revenue-delivered file. Only update the data in the error file because this is the file you use to rerun the process.

To check an employee's details, navigate to the statutory details table as follows: Global Payroll, Payee Data, Taxes, Maintain Tax/NI Data GBR

Rerunning the Code Number Changes Process

When you have resolved the errors and updated the error file as necessary, you can rerun the Code Number Changes process.

When you rerun the process, don't resubmit the original Inland Revenue flat file because it includes all the employees already processed. Instead, use the corrected error file which has the same format as the Inland Revenue-delivered file.

The table below explains how to complete the fields on the run control page when you rerun the process:

Field	Value
Uplift Date	Use the same date as before, or enter a different effective date as necessary.
Inland Revenue Flat File	The Inland Revenue error file (that you have updated). Note. Do not remove the header and footer information from the error file. The process fails if this information is missing.

Field	Value
Inland Revenue Error File	Enter the name of a new error file. The system doesn't allow you to use the same filename for both the flat file and the error file.
Message Log File	Use the same log file name as before, or enter a new log file name.

Note. When you rerun the Code Number Changes process, the message log file refers to lines of data in the corrected error file, and not the original Inland Revenue-delivered file.

See *PeopleTools PeopleBook: PeopleSoft Process Scheduler*, “Using Process Monitor”

CHAPTER 17

Running Payroll Reports

This chapter explains how to run reports delivered with PeopleSoft Global Payroll for the UK.

Setting Up Report Profiles

The Profile Report is provided as a mechanism for creating simple listing reports of selected elements. Its primary purpose is to facilitate the extraction of precise data requirements on an *on-demand* basis. The on-demand nature of reporting is becoming increasingly more common and is standard practice in many payroll departments. For example, a departmental manager may want to know how much overtime has been worked, and by whom, at 1.5 x base rate in a specific pay (calendar) period.

The intention of profile reporting is simply to provide a listing of data that matches predetermined search criteria and to provide a gateway for that data to be imported to some other software package for further detailed analysis, summation, and presentation. In this respect, spreadsheet software is the intended primary target.

There are many scenarios where profile reporting can provide the basis for seeking a solution to a given question, need, or problem. For example, you can use profile reporting to create the following:

- Inland Revenue audits: Profile reporting can list all tax and National Insurance deductions and refunds by employee over single or multiple periods of time.
- Simple listings for identifying how much employees have been paid or deducted, in terms of specific elements of pay and deductions over single or multiple periods of time.
- Payment and/or deduction listings, which can be used to reconcile the payroll or indeed form the basis of General Ledger journal entries.
- Listings of union subscriptions, social club contributions, pension, and/or AVC contributions.

To run the Profile Report, you must first set up a report profile for a user on the Report Profile page.

Pages Used to Set up Report Profiles

Page Name	Object Name	Navigation	Usage
Report Profile	GPGB_PROFILE_PNL	Set Up HRMS, Product Related, Global Payroll, Reports, Report Profile GBR	Create a profile for a user. This profile is then used in the Profile Report, which displays exactly the information that user required.

Creating User Profiles

Access the Report Profile page.

Report Profile

User ID: GPGBR

Profile Content Find | View All First 1 of 1 Last

Description: GG Global Payroll UK

Element Order	Element Description	*Entry Type	*Element Name
1	10	Reg Pay	Earnings GBR ER REGPY

Report Profile page

- Element Order** Enter the order in which you want the element to appear in the Profile Report.
- Entry Type** This is the type of element you want to display on the Profile Report.
- Element Name** Name the element you want to appear on the Profile Report. The elements available are those belonging to the Entry Type you selected earlier.

Running Statutory Reports

This section explains how to generate statutory reports to meet Inland Revenue requirements.

Pages Used to Run Statutory Reports

Page Name	Object Name	Navigation	Usage
Varies by report	GPGB_GPSQR_PNL	<p>You can access this page through multiple navigation paths. This lists shows five of the possible paths.</p> <ul style="list-style-type: none"> • Global Payroll, Absence and Payroll Processing, Payroll Reports, P11-Part 1 GBR • Global Payroll, Absence and Payroll Processing, Payroll Reports, P14/P60 GBR • Global Payroll, Absence and Payroll Processing, Payroll Reports, P32 GBR • Global Payroll, Absence and Payroll Processing, Payroll Reports, P35 GBR • Global Payroll, Absence and Payroll Processing, Payroll Reports, TC02 GBR 	<p>Use this page to run these reports:</p> <ul style="list-style-type: none"> • P11 — Part 1 (GPGBP11A), Part 2 (GPGBP11B), and Part 3 (GPGBP11C) reports that lists the National Insurance contributions section, PAYE income tax and tax credits section of the P11 form, and the tax credits section of the P11 deductions working sheet. • P14/P60 report (GPGBP14). P14: Summarizes at the end of the year each employee for whom any tax and National Insurance contributions were payable. P60: Tax and National Insurance certificate, or rather the Employee's Certificate of Pay, income tax, and GP1. • P32 report (GPGBP32). Employer's payment record that lists required details each time an employer makes a payment. • P35 report (GPGBP35). Lists at the end of the year all PAYE tax and National Insurance contributions, as well as the Employer's Annual Return. • TC02 report (GPGBTXCR). This report lists the date when the last tax credit was paid and the date up to which the tax credit was paid.

Page Name	Object Name	Navigation	Usage
P45	GPGB_RUNCTL_P45	Global Payroll, Absence and Payroll Processing, Payroll Reports, P45 GBR	Run the P45 report (GPGBP45). The P45 is issued to an employee who leaves your employment. This report details current tax information as of the date of last payment and all the employer's tax\reference details required by the employee.
P46(Car)	GPGB_RC_P46C	Global Payroll, Absence and Payroll Processing, Payroll Reports, P46(Car) GBR	Run the P46(Car) report (GPGBP46C). This report is submitted to the Inland Revenue every quarter for employees with a company car. The report extracts information from both PeopleSoft Human Resources and Global Payroll tables: <ul style="list-style-type: none"> • Company car data in PeopleSoft Human Resources. • Employee and director information from the Statutory Details table. • Employer information from the Pay Entity Details table.

See Also

PeopleSoft Human Resources PeopleBook: Administer Company Cars

Running the P45 Report

Access the P45 page.

P45

Run Control ID: CV [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Parameters

Selection Criteria: Pay Entity

Calendar Group ID: GGD2001/P-04

Employee ID: GGED-407 Jones, Grace

Final Print? ☐

P45 page

Calendar Group ID

The P45 process picks up employees with the calendar group ID indicated in the Calendar Group ID field if their termination date matches (is included in or is less than) the calculation dates of the calendar group.

Final Print?

Select this check box to generate a final print of the P45. When you select Final Print?, the P45 - Calendar Group ID field on the Statutory Tax page is automatically updated, indicating that the P45 has been generated for the Calendar Group displayed in this field. Once you ask for a final print, you will only be able to reprint the P45 (if needed) from the same calendar group ID—even if other calculations take place.

Running the P46(Car) Report

Access the P46(Car) page.

P46(Car)

Run Control ID: pmh [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

*Pay Entity: GGPE01 GBR Pay Entity 01

*Quarter Start Date: 01/04/2002 *Quarter End Date: 31/07/2002

P46(Car) page

Pay Entity	Select the pay entity for which you want to run the report. The system generates a report for each employee in the pay entity who has a company car or has withdrawn from the company car scheme during the quarter.
<hr/>	
Note. Make sure you complete the Pay Entity Details page for the pay entity. The P46(Car) report uses the employer information from Pay Entity Details.	
<hr/>	
Quarter Start/End Date	Enter the start and end date for the quarter.

Running Non-Statutory Reports

This section explains how to run these reports delivered with PeopleSoft Global Payroll for the UK:

- High/Low Earners
- Profile report
- Gross to net report

Common Elements Used in Section

Tax Year Begins In	(Required) Enter the tax year that you want to process.
Calendar Run ID	Select if you want to run the report for a specific calendar run ID.
Pay Entity	Select if you want to run the report for a specific pay entity.
Pay Group	Select if you want to run the report for a specific pay group.
All Periods	Select if you want the report to include results for the tax year that you specified. If you select All Periods but do not specify a Frequency ID, the system displays all results for that tax year.
Frequency ID	Select the frequency ID that you require: <i>A</i> (annual), <i>B</i> (biweekly), <i>F</i> (fourweekly), <i>M</i> (monthly), <i>Q</i> (quarterly), and <i>W</i> (weekly). <hr/> Note. If you select All Periods and also select the Frequency ID that you require, the system displays the results for that frequency. For example, if you select All Periods and enter the Frequency ID <i>M</i> , the system displays all monthly payroll results for that tax year. <hr/>
Tax Period	Enter the tax period whose results the report should display. For example, if you enter a Frequency ID of <i>Q</i> and enter the value <i>4</i> in the Tax Period field, the report displays the payroll results of the fourth quarter of the tax year that you specified. This field is available for entry only if you enter a Frequency ID and move out of the field.

Pages Used to Run the Non-Statutory Reports

Page Name	Object Name	Navigation	Usage
High/Low Earners	GPGB_GPSQR_PNL3	Global Payroll, Absence and Payroll Processing, Payroll Reports, High/Low Earners GBR	<p>Run the High/Low Earners report (GPGBHLE). This report evaluates earnings based on an element that you select.</p> <p>For example, you can use this report to display all employees who earned more than £2,000 (GBP) as basic pay for a specific period, or to display those employees who received a tax refund during a specific period.</p>
Profile Report	GPGB_GPSQR_PNL2	Global Payroll, Absence and Payroll Processing, Payroll Reports, Profile Report GBR	<p>Run the Profile Report (GPGBRPRF). This report displays exactly the information that you require based on report profiles that you create. For example, you may have a payroll clerk with the user ID JBrown who wants to see information about only overtime payments. Create a profile for this user to include only the information required. When you run the Profile Report, only this information is reported.</p> <p>Note. You must set up Report Profiles before you can run this report.</p>
Gross to Net Reports	GPGB_GPSQR_PNL	Global Payroll, Absence and Payroll Processing, Payroll Reports, Gross to Net GBR	Run the Gross to Net report (GPGBGTNA). Use this report to reconcile your payroll. Run at any time during the tax year.

See Also

Chapter 17, “Running Payroll Reports,” Setting Up Report Profiles, page 101

Running the High/Low Earners Report

Access the High/Low Earners page.

High/Low Earners		
Run Control ID: CV	Report Manager	Process Monitor Run
Language: English		
Tax Year Begins In: 2001		
Parameters		
Calendar Run ID <input type="radio"/>	Pay Entity <input checked="" type="radio"/>	Pay Group <input type="radio"/>
Calendar Group ID: <input type="text"/>	Pay Entity: GGPE01	Pay Group: <input type="text"/>
Department: <input type="text"/>	EmplID: <input type="text"/>	
All Periods: <input checked="" type="checkbox"/>	Frequency: <input type="text"/>	Tax Period: <input type="text"/> 0
PIN Code: <input type="text"/>	<input type="text"/>	Condition Amount: <input type="text"/> 0.00

High/Low Earners page

PIN Code

Select the PIN code that you want to evaluate against the statement.

Select the statement that you want to use in your calculation:

<, <=, =, >, and >=.

Condition Amount

Enter the amount that you want to evaluate the PIN code against.

CHAPTER 18

Using Self-Service Applications for the UK

This chapter provides an overview of the self-service applications delivered with PeopleSoft Global Payroll for the UK.

Understanding Self-Service Applications

The following self-service applications are delivered with your PeopleSoft Global Payroll country extension:

- *The Payroll Users Payslip*: This payslip enables payroll administrators to display payslips at any time during the payroll cycle.

Note. Set up this payslip using the payslip definition pages documented in Setting Up Payslips for the UK.

- *Payslip Printing*: This process enables payroll administrators to create a payslip result table which can be used as a basis for in-house or external payslip printing.

Note. An employee self-service payslip is available to enable employees to view their own payslips online once they have been finalised. The employee payslip is delivered as part of PeopleSoft ePay and is documented in the *PeopleSoft ePay PeopleBook*.

Viewing and Printing Payslips

This section describes the self-service pages for viewing and printing payslips.

Pages Used to View and Print Payslips

Page Name	Object Name	Navigation	Usage
Pay Advice	GPGB_PSLIP_SS	Employee Self Service, Payroll and Compensation, View Payslip GBR, Pay Advice	Enables a payroll administrator to view employee payslips during the payroll cycle. Payslips must first be set up on the payslip definition pages.
Payslip Print	GPGB_PSLIP	Global Payroll, Payslips, Create/Print Payslips GBR, Payslip Print	Enables a payroll administrator to create a payslip result table which can be used as a basis for internal or external payslip printing once the payroll process has been finalised. Payslips must first be set up on the payslip definition pages.

Viewing Payslips

Access the Pay Advice page.

Pay Advice
Colins Carter
 Business Institute - UK

Payment Date: 25/01/2001
Tax Period: 10

Colins Carter Folly Street RG1 1AX NI Number: CB999111D Bank Sort Code: -- Account Number:	Employee ID: KGG106 Empl Rcd#: 0 Department: Headquarters - Reading, UK Location: Reading - England Business Unit: Administration - UK Pay Rate: 880.00 M	Job Title: Specialist Tax Code: 439L Tax Basis: Cumulative NI Category Code: A Net: 4603.35 Gross: 4928.55
--	--	---

Earnings								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
Basic Pay							880.00	880.00

Payroll Users Payslip page (1 of 3)

Before-Tax Deductions								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
							0.00	0.00
After-Tax Deductions								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
							0.00	0.00
National Insurance								
Description					Adjustment	Current	Year To Date	
NI EE's						199.00	199.00	
NI ER's						556.75	556.75	
Tax								
Description					Adjustment	Current	Year To Date	
PAYE						126.20	126.20	

Payroll Users Payslip page (2 of 3)

Payroll Messages	
UK IVT Payslip for PayGroup KGPGMonth1	
UK IVT Payslip for PayGroup KGPGMonth1	
UK IVT Payslip for PayGroup KGPGMonth1	
UK IVT Payslip for PayGroup KGPGMonth1	
UK IVT Payslip for PayGroup KGPGMonth1	
UK IVT Payslip for PayGroup KGPGMonth1	
Employee Messages	
Yves - this is a sample payslip only.	

Payroll Users Payslip page (3 of 3)

Common Page Information

Payment Date	The date when the employee is paid. This information is populated from the calendar.
Tax Period	The tax period is defined on the calendar.
NI Number (National Insurance number)	The employee's National Insurance number.
Business Unit	The employee's business unit. This is populated from the employee's job record.
Tax Code	Populated from the Statutory Details — Tax page.
Tax Basis	Populated from the Statutory Details — Tax page.
NI Category (National Insurance category)	Populated from the Statutory Details — NI page.
Pay Rate	Populated from the Job table.
Net Pay	Populated from the payroll results accumulator GBR AC NETT.

Pay Advice – Earnings

The results of the payroll calculation.

Before Tax Deductions

The results of the payroll calculation.

After-Tax Deductions

The results of the payroll calculation.

National Insurance

The results of the payroll calculation.

Tax

The results of the payroll calculation.

Balances

The results of the payroll calculation.

Payroll Messages

The message that you created for the pay group on the Payslip Message by Pay Group page.

Employee Messages

The message that you created for a specific employee on the Payslip Messages by Employee page.

See Also

[Chapter 5, “Setting Up Payslips for the UK,” page 21](#)

Printing Payslips

Access the Payslip Print page.

This page generates a set of result tables which can be used as a basis for internal or external payslip printing.

Payslip Print

Run Control ID: GN3 [Report Manager](#) [Process Monitor](#) [Run](#)

Operation(s)

*Calendar Group: GGD2001/P-08 Monthly Calendar Period 8 Dir
 ID:
 Stream Number: ☐ Process Streams

Streams [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Stream Number	Calculated
	<input type="checkbox"/>

Calendars in Run [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Pay Group	Calendar ID	Payment Date
GGPDIR	GGD2001/P-08	30/11/2001

Payslip Print page

Operations

Calendar Group ID Select the calendar group for which you want to load payslip result data.

Stream Number/Process Streams Stream and Process Stream fields are as defined on the Streams and Payroll/Absence Run Control pages. If you have defined them for processing, then you can use them to select results to load into the payslip printing tables.

Streams

Stream Number This field displays the streams you are using to load data into the payslip printing tables.

Calculated This field indicates which streams have been calculated.

Calendars in Run

Pay Group This field displays the pay group for which you are loading payslip result data.

Calendar ID This field displays the calendar ID for which you are loading payslip result data.

Payment Date This field displays the payment date for which you are loading payslip result data.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Payroll Processing,” Creating Process Streams

APPENDIX A

PeopleSoft Global Payroll for the UK Reports

This appendix provides an overview of PeopleSoft Global Payroll for UK reports and lists summary table of all reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Global Payroll for the UK Reports: A to Z

The following table lists the PeopleSoft Global Payroll for UK reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details in the appropriate chapter of this PeopleBook.

Note. If you don't enter the tax year that you want to process, the report will not run.

Report ID and Report Name	Description	Navigation	Run Control Page
GPGBPSLP Print Payslip	Use this page to generate a set of result tables which can be used as a basis for internal or external payslip printing.	Global Payroll, Payslips, Create/Print Payslips GBR, Payslip Print	GPGB_PSLIP
GPGBGTNA Gross to Net	Reconciles your payroll. You can run this report at any time during the tax year.	Global Payroll, Absence and Payroll Processing, Payroll Reports, Gross to Net GBR	GPGB_GPSQR_PNL
GPGBHLE High/Low Earners	Evaluates earnings based on an element that you select. For example, you can use this report to display all employees who earned more than £2,000 (GBP) as basic pay for a specific period, or to display those employees who received a tax refund during a specific period.	Global Payroll, Absence and Payroll Processing, Payroll Reports, High/Low Earners GBR	GPGB_GPSQR_PNL3
GPGBP11A P11 – Part 1	Lists the National Insurance contributions section of the P11 form.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P11-Part 1 GBR	GPGB_GPSQR_PNL

Report ID and Report Name	Description	Navigation	Run Control Page
GPGBP11B P11 – Part 2	Lists the PAYE income tax and tax credits section of the P11 form.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P11-Part 2 GBR	GPGB_GPSQR_PNL
GPGBP11C P11 – Part 3	Lists the tax credits section of the P11 deductions working sheet.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P11-Part 3 GBR	GPGB_GPSQR_PNL
GPGBP14 P14/P60	P14: Summarizes at the end of the year each employee for whom any tax and National Insurance contributions were payable. P60: Tax and National Insurance certificate, or rather the Employee's Certificate of Pay, income tax, and GPI.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P14/P60 GBR	GPGB_GPSQR_PNL
GPGBP32 P32	Employer's payment record that lists required details each time an employer makes a payment.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P32 GBR	GPGB_GPSQR_PNL
GPGBP35 P35	Lists at the end of the year all PAYE tax and National Insurance contributions, as well as the Employer's Annual Return.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P35 GBR	GPGB_GPSQR_PNL
GPGBP45 P45	Issued to an employee who leaves your employment. This report details current tax information as of the date of last payment and all the employer's tax\reference details required by the employee.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P45 GBR	GPGB_RUNCTL_P45
GPGBP46C P46(Car)	Submitted to the Inland Revenue every quarter for employees with a company car.	Global Payroll, Absence and Payroll Processing, Payroll Reports, P46(Car) GBR	GPGB_RC_P46C
GPGBRPRF Profile Report	Displays exactly the information that you require.	Global Payroll, Absence and Payroll Processing, Payroll Reports, Profile Report GBR	GPGB_GPSQR_PNL2
GPGBTXCR Tax Credit	Lists the date when the last tax credit was paid and the date up to which the tax credit was paid.	Global Payroll, Absence and Payroll Processing, Payroll Reports, TC02 GBR	GPGB_GPSQR_PNL

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Setting Up and Running Generic Reports”

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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