
PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Global Assignments

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PeopleSoft Enterprise Human Resources Track Global Assignments Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Track Global Assignments.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks* and the *PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Track Global Assignments

This chapter provides an overview of the PeopleSoft Enterprise Human Resources Track Global Assignments business process in and discusses:

- Track Global Assignments business processes.
- Track Global Assignments business process integrations.
- Track Global Assignments business process implementation.

Track Global Assignments Business Process Overview

Track Global Assignments business process in PeopleSoft Enterprise Human Resources enables you to assign employees to a global assignment and to monitor, compensate, and track education and qualification for the employees and their dependents as they move from project to project in your organization's operations in multiple countries.

This section provides an overview of global assignment tracking and discusses:

- Temporary versus permanent assignments.
- Managing employees on global assignment.

Understanding Global Assignment Types

If your organization has operations in more than one country, you process large amounts of information about employees as they move from project to project. PeopleSoft Enterprise Human Resources enables you to ensure smooth transitions for employees on global assignments.

You can manage temporary assignments for:

- Expatriate employees.

Home base employees who work in other countries or locations.

- Inpatriate employees.

Employees from other countries who work in your organization's home country.

- Third country nationals.

Employees who are citizens of one country and have a home base in a second country but go on assignment to a third country. For example, a Canadian citizen with a home base in the United States may go on assignment to Saudi Arabia.

Temporary Versus Permanent Assignments

Before you begin to administer a new assignment, determine whether the assignment is temporary or permanent.

- Temporary Assignments

In a temporary assignment, you expect the employee to return to a home base when the assignment ends. An assignment is considered temporary even if it lasts up to several years.

Before the employee leaves for a temporary global assignment, you establish a home base (where the employee is permanently based) for the employee where you keep central employee, benefit, and payroll data for that employee. Create new records to track employee data for the new location. The new location is referred to as the host location.

You maintain two sets of employee data: one set is home data and the other is host data for the new assignment abroad. To keep two sets of current data for an employee, you create new employment record numbers, which precludes you from overwriting existing home information.

- Permanent Assignments

A permanent assignment is one where the host location becomes the employee's new home base. You do not expect the employee to return to his or her previous home base. For permanent assignments, all employee, benefit, and payroll data tracking should occur at the new location. You no longer need to keep employee data at the previous home base. When employees change to permanent assignments elsewhere, you transfer employee data using the Job Data pages in the Workforce Administration menu.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce."

Managing Employees on Global Assignment

To manage employees on global assignment:

1. Ensure that employees have home data—standard, permanent personnel administration data in Human Resources, including employee IDs.
2. Establish host data for each assignment, such as location, job code, and department.
3. Enter assignment details, including the start and end date of the assignment, the disposition of the employee residence, vehicle information, and furniture arrangements.
4. Set up data for dependents who are accompanying the employee on the assignment, including non-family members such as nannies.
5. Enter payment instructions for supplemental earnings or deductions, such as cost-of-living adjustments, school tuition reimbursements, hypothetical tax deductions, and housing allowances.
6. When the assignment is completed, enter the end date.

Human Resources also contains several supplemental pages to help you process assignments. You can:

- Track visas and permits required for employees and their dependents.
- Track company-paid travel.
- Provide information on international schools and programs.
- Review educational qualifications, competencies, accomplishments, and languages of employees.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information"

Track Global Assignments Business Processes

Track Global Assignment provides the following business processes:

- Track assignees qualifications.

Track assignees qualifications for assignments, such as education, languages, and competencies.

- Track assignments.

- Manage assignments.

Manage assignees assignment details, such as their home base job information and their job information (host) while on assignment, in addition to assignment beginning and end dates, travel details, residence details, and vehicle assignments.

- Track dependent information.

Track information about assignee's dependents.

- Track company paid travel.

Track company paid travel for assignees and their dependents.

- Track assignment compensation.

Track employee compensation that results from an assignment.

- Track educational allowances.

Track educational allowances for assignees and their dependents.

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

See Also

Chapter 3, "Tracking Assignments," page 17

Chapter 4, "Managing Educational Allowances," page 47

Track Global Assignments Business Process Integrations

Human Resources integrates with all PeopleSoft HRMS applications, other PeopleSoft applications, and third-party applications.

Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many Human Resources tables is available to PeopleSoft applications set up to subscribe to the published messages.

Track Global Assignments Business Process Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

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

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Setting Up Global Assignments

This chapter discusses how to:

- Implement employee data security for global assignments.
- Define global assignment types.
- Classify types of company-paid travel.
- Define deductions and earnings for assignment compensation.
- Set up education data for assignments.

Understanding Special Security Options for Global Assignments

Employees on global assignment have two Job Data records: a Home assignment and Host assignment. Because of the challenges of managing someone with two job data records that are separate, yet connected, PeopleSoft HCM security provides you with Home/Host security options that apply to the data permission security that you have already set up for your users.

Using Home/Host security options you can:

- Limit a user's access to the Job Data records to which their standard data permission grants them access.

Note. This is the default option in effect when you choose not to enable any Home/Host security options.

- Enable a user who has access to an employee's Home data to also be able view the Host data.
- Enable a user who has access to an employee's Host data to also be able to view the Home data.
- Enable users with Home data to be able to view Host data and users with access to Host data to be able to view Home data.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security."

Example: Using Home/Host Security Options

Jan Smit is ordinarily based in New York but has been sent on assignment to Sydney, Australia. Jan's organization uses the Business Unit field to secure person data. Her Home Job Data record is in the Eastern US business unit and her Host Job Data record is in the Australia Business Unit.

The following table illustrates who can access Jan's data, depending on how Home/Host access has been set up:

Note. The system uses a number of fields from the Job Data pages to secure the data of people with jobs, but their data is secured using this data on a variety of pages throughout the system, not just the job pages.

Home/Host Access Type	Data Tied to Home Job Data	Data Tied to Host Job Data
No Home/Host Security Option	Eastern BU users*	Australia BU users**
Home can see Host	Eastern BU users	<ul style="list-style-type: none"> Australia BU users Eastern BU users
Host can see Home	<ul style="list-style-type: none"> Eastern BU users Australia BU users 	Australia BU users
Both (Home can see Host and Host can see Home)	<ul style="list-style-type: none"> Eastern BU users Australia BU users 	<ul style="list-style-type: none"> Australia BU users Eastern BU users

Note. Eastern BU users: People with access to the Eastern US business unit, such as Jan's Home manager or the Eastern US HR Administrator.

Australia BU users: People with access to Australia business unit, such as Jan's Host manager or the Australian HR Administrator.

Setting Up Home/Host Security Options

To enable home host security:

1. Select the Include Home/Host Access? check box on the Security Install Settings page (SCRTY_INSTALL) and indicate which version of Home/Host security you want to use.
2. On the Security Access Type page (SCRTY_TYPE2_TBL), select which version of Home/Host security to use.

By enabling Home/Host security at the security access type level, you can use it with one security type but not another.

For example, managers may have data permission using the Job Department Tree security access type and HR administrators have access using the Job Location access type. You could enable Home/Host Security for the Job Location access type to allow HR administrators to continue to administer employees on assignment, while not enabling it for managers so that they can continue to only see their current direct reports.

Note. The options available depend on which option you selected on the Security Install Settings page.

See *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security," Implementing Data Permission Security.

Defining Global Assignment Types

To set up global assignment types, use the Assignment Type Table (ASSGN_TYPE_TABLE) component.

This section discusses how to create new types of employee assignments.

Page Used to Define Global Assignment Types

Page Name	Definition Name	Navigation	Usage
Assignment Type Table	ASSGN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Assignment Type Table, Assignment Type Table	Create new types of employee assignments.

Creating New Types of Employee Assignments

Access the Assignment Type Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Assignment Type Table, Assignment Type Table).

Assignment Type Table

Assignment Type: D02

Assignment Type
 Find | View All First 1 of 1 Last

*Effective Date: 01/01/2000
 *Status: Active
 + -

*Description: Business Trip Out-of-Country

Short Description: Bus Out-Cn

Assignment Type Table page

(GER) Defining German Assignment Types

When entering assignment types for Germany, select from these options:

Type	Description
A01	Assignment In-Country
A02	Assignment Expat DBA taxfree

Type	Description
A03	Assignment Expat DBA taxable
A04	Assignment Expat ATE taxfree
A05	Assignment Expat ATE taxable
D01	Business Trip In-Country
D02	Business Trip Out-of-Country
D03	Assembly Assignment DBA taxable

Classifying Types of Company-Paid Travel

To set up types of company-paid travel, use the Travel Type Table (TRAVEL_TYPE_TABLE) component.

This section discusses how to classify types of company-paid travel.

Pages Used to Classify Types of Company-Paid Travel

Page Name	Definition Name	Navigation	Usage
Travel Type Table	TRAVEL_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Travel Type Table, Travel Type Table	Classify types of company-paid travel. Use the codes that you set up here to make travel arrangements for employees and their dependents in the Company Paid Travel page.

Classifying Types of Company-Paid Travel

Access the Travel Type Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Travel Type Table, Travel Type Table).

Travel Type Table					
Type of Travel:		K01			
Travel Type Details					
Customize Find View All First 1 of 1 Last					
*Effective Date	*Status	*Description	Short Description	Home Leave	
01/01/1980	Active	Home Leave	Home Leave	<input checked="" type="checkbox"/>	+ -

Travel Type Table page

- Effective Date** Enter the date the travel type becomes effective.
- Status** Select a status for the travel type. Available options: *Active* or *Inactive*
- Description** Enter a descriptive label for the travel type you are defining.
- Home Leave** Select to indicate that a worker is going on leave to his or her home (permanent) location.
- If you select *Home Leave*, the system automatically disables the fields in the To section on the Company Paid Travel page when this travel type is used.

Defining Deductions and Earnings for Assignment Compensation

To set up deductions and earning for assignment compensation, use the Earnings (EARNINGS_TABLE1), and Deductions (DEDUCTION_TABLE1) components.

This section provides an overview of assignment deductions and earnings and discusses how to:

- Add deduction codes and classification information.
- Define tax treatments.
- Add earnings codes.

Understanding Assignment Deductions and Earnings

Employees on global assignments often are entitled to supplemental earnings, such as cost-of-living adjustments and hardship premiums. You might also take additional deductions from the employee's paycheck because of estimated taxes.

Enter earnings and deductions as they relate to home and host assignment data. For example, an employee might receive a cost-of-living adjustment that is paid for by the host location and a hardship premium that the home location absorbs. Enter these components in multiple currencies; the system automatically calculates the equivalent amounts in the home currency.

To identify recurring payments or isolated incidents of supplemental earnings or deductions, track compensation data by employee and payment instruction type. PeopleSoft includes two types of payment instructions: global compensation and one-time payments. These are sufficient for most compensation that relates to global assignments.

If the organization is not using PeopleSoft Enterprise Payroll for North America and you want to track assignment compensation, set up deduction, tax, and earnings information on the Earnings and Deductions components.

You can track assignment compensation on the Assignment Compensation component.

See [Chapter 2, "Setting Up Global Assignments," Adding Deduction Codes and Classification Information, page 11.](#)

Note. Use the Payroll for North America Earnings and Deductions tables (Set Up HRMS, Product Related, Payroll for North America) to set up earnings and deductions if you use Payroll for North America. The global assignments tables do not contain enough information to substitute for the payroll tables.

Make the tables in the Global Assignments menu display-only to ensure that all updates take place by using the pages in North American Payroll.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs"

[Chapter 2, "Setting Up Global Assignments," Adding Deduction Codes and Classification Information, page 11](#)

[Chapter 3, "Tracking Assignments," Tracking Assignment Compensation and Currency Fluctuation, page 44](#)

Pages Used to Define Deductions and Earnings for Assignment Compensation

Page Name	Definition Name	Navigation	Usage
Deduction Table	DEDUCTION_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions, Deduction Table	Add deduction codes and classification information.
Deduction Table2	DEDUCTION_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions, Deduction Table2	Define tax treatments for assignment deductions.

Page Name	Definition Name	Navigation	Usage
Earnings Table	EARNINGS_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Earnings, Earnings Table	Add earnings codes for global assignments.

Adding Deduction Codes and Classification Information

Access the Deduction Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions, Deduction Table).

The screenshot displays the 'Deduction Table' page. At the top, there are tabs for 'Deduction Table' and 'Deduction Table2'. Below the tabs, the 'Plan Type' is set to '00' and 'General Deduction'. The 'Deduction Code' is 'B00-03'. The 'Deduction Information' section contains the following fields: '*Effective Date' (01/01/1980), '*Description' (Travel Advance), 'Short Description' (Travel Adv), 'Deduction Priority' (125), and 'Special Processing' (a dropdown menu). Below these fields is a section for 'Maximum Arrears Payback' with three radio button options: 'No Maximum' (selected), 'Flat Maximum for Payback' (with an input field), and 'Factor x Regular Deduction' (with an input field). To the right, there is a 'Deduction Subset' table with columns for '*Subset ID' and 'Description'. The table shows one row with a search icon next to the 'Subset ID' field.

Deduction Table page

For deduction codes for global assignments, enter a Plan Type of 00.

Warning! Enter information in these fields only: Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code on other assignment pages. You could also receive an error message if you don't fill in all of the required fields that are on the other pages for the table that is in the Payroll for North America or Payroll Interface menus, depending on the payroll system that you use.

Defining Tax Treatments

Access the Deduction Table2 page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions, Deduction Table2).

Deduction Table **Deduction Table2**

Plan Type: 00 General Deduction

Deduction Code: B00-03 Travel Advance

Deduction Information Find First 1 of 1 Last

Effective Date: 01/01/1980 + -

Tax Classifications Find View All First 1 of 1 Last + -

Deduction Classification

- ☒ After-Tax
- ☐ Before-Tax
- ☐ Nontaxable Benefit
- ☐ Nontaxable Btax Benefit
- ☐ Taxable Benefit
- ☐ QC Taxable Benefit

Canadian Sales Tax

- ☒ None
- ☐ Goods and Services Tax
- ☐ Harmonized Sales Tax
- ☐ Provincial Sales Tax
- ☐ Provincial Sales Tax Insurance
- ☐ Provincial Premium Tax

Special Accumulator(s) Find View All First 1 of 1 Last

*Accum Code:

*Effect on Special Balance: Adds to + -

Deduction Table2 page

Deduction Classification Select a deduction type.

Canadian Sales Tax Select the type that is required in Canada.

Adding Earnings Codes

Access the Earnings Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Earnings, Earnings Table).

Earnings Table	
Earnings Code: AUT	
Earnings Information Find First 1 of 1 Last	
*Effective Date:	01/01/1980 31 *Status: Active ▼ + -
*Description:	Automobile Allowance
Short Description:	Auto Allow
*Allowable Employee Types:	All ▼
Payment Type <input type="radio"/> Either Hours or Amount OK <input type="radio"/> Both Hours and Amount OK <input type="radio"/> Hours Only <input checked="" type="radio"/> Amounts Only <input type="radio"/> Unit/Override Rate <input type="radio"/> Flat Amount	Effect on FL SA <input checked="" type="radio"/> None <input type="radio"/> Both Hours and Amount <input type="radio"/> Hours Only <input type="radio"/> Amounts Only Eligible for Retro Pay <input type="checkbox"/> Eligible for Retro Pay <input type="checkbox"/> Used to Pay Retro
<input type="checkbox"/> Hours Distribution	

Earnings Table page

Warning! Enter information in these fields only: Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code on other assignment pages. You could also get an error message because you don't fill in all of the required fields that are on the other pages for the table that is in the Payroll for North America or Payroll Interface menus, depending on the payroll system that you use.

Setting Up Education Data for Assignment

To set up additional education data, use the Majors (MAJOR_TABLE), School/Program Table (INTL_SCHPGM_TABLE), and School/Program Contact Table (INTL_CONTACT_TABLE) components.

This section provides an overview of assignment education data and discusses how to:

- Enter school and orientation program information.
- Track contacts for schools and programs.

Understanding Assignment Education Data

The organization may provide financial assistance to employees who are on global assignments, such as school tuition for children and language and orientation classes for adults. PeopleSoft Enterprise Human Resources helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

If the organization offers education allowances for employees or dependents, set up information about the schools and programs that are available to the employees and their dependents.

Setting Up Majors

Use the Majors page if you need to set up a new major for global assignments.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

Pages Used to Set Up Assignment Educational Data

Page Name	Definition Name	Navigation	Usage
School/Program Table	INTL_SCHPGM_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Table, School/Program Table	Enter school and program information.
School/Program Contact Table	INTL_CONTACT_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Contact Table, School/Program Contact Table	Track contacts for schools and programs. Note. You must already have set up information for international schools and programs in the School/Program table.
Majors	MAJOR_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, Majors, Majors	Include areas of study most commonly associated with school degrees or certificates.

Entering School and Orientation Program Information

Access the School/Program Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Table, School/Program Table).

School/Program Table

School/Program Code: K00003

Program Table Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 31 Active

*Status: + -

*Description: The British Council Schl Spain Short Description: BC Madrid

*Sch/Pgm Typ: Private School *Int/Ext: External

Address

Country: ESP Spain

Address: Promenade del General Martinez Campos, 31. 28010- Madrid. Madrid Edit Address

School/Program Table page

Sch/Pgm Typ (school or program type) Select a school or program type. Options are: *Language School, Private School, Public School, Other, and Local Customs.*

Int/Ext (internal or external) Select *Internal* to the organization or *External*.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality"

Tracking Contacts for Schools and Programs

Access the School/Program Contact Table page (Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Define Education Related Info, School/Program Contact Table, School/Program Contact Table).

School/Program Contact Table

School/Program Code: K00003 The British Council Schl Spain

Program Contact Table Details

Find | View All First 1 of 1 Last

*Contact Nbr: 1

*Name: Labertino,Christophe

Title: Dean

Contact Type: Primary

Contact Phone Numbers

Find | View All First 1 of 1 Last

*Phone Type	Phone
Main	331-235843

School/Program Contact Table page

- Contact Nbr** (contact number)

Enter the contact number of the school or program. For example, enter the headmistress of a school as the first contact, and the assistant headmistress as the second contact.
- Contact Phone Numbers**

Select the phone type and enter the phone number for the contact. Add new data rows to list more than one contact phone number for each contact.

Chapter 3

Tracking Assignments

This chapter provides an overview of global assignment tracking and discusses how to:

- Create checklists.
- Manage employee home and host data.
- Manage assignments with multiple home or host data records.
- Manage employee assignment data.
- Manage company-paid travel for employees on assignment.
- Manage dependent information for employees on assignment.
- Track assignment compensation and currency fluctuation.

Understanding Global Assignment Tracking

When you send an employee on a global assignment, you track new assignment details, additional employee earnings and deductions, and different benefits packages. You might also administer an employee's personal affairs, such as housing, vehicles, and furniture. With PeopleSoft Enterprise Human Resources, you can settle employees and their dependents in new locations.

Note. Before you process a global assignment, a human resources record and emplID must already exist in the PeopleSoft Enterprise Human Resources system for the employee.

Creating Checklists

To set up checklists, use the Checklist Items (CHKLST_ITEM_TBL) and Checklist (CHECKLIST_TABLE) components.

This section provides an overview of creating checklists and lists the pages used to create checklists.

Understanding Creating Checklists

Much of the information that you process for different assignment types and countries remains constant. To save yourself work (and prevent data entry errors or omissions), create standard checklists to streamline global assignment processing. For special situations, use standard checklists as the basis for creating modified checklists.

Set up checklists by using the Checklist Items and Checklist pages. To tailor a checklist for an employee, use the Person Checklist page.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Creating Checklists

Pages Used to Create Checklists

Page Name	Definition Name	Navigation	Usage
Checklist Items	CHKLST_ITEM_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist Items, Checklist Items	Define items that could appear on a checklist.
Checklist	CHECKLIST_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist, Checklist	Define employee checklists.
Person Assignment Checklist	EMPLOYEE_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Person Assignment Checklist	Identify checklist items to use as a guide to process employees.
Person Checklist	PERSON_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist	Identify checklist items to use as a guide to process people.

Managing Employee Home and Host Data

This section discusses how to:

- Define and maintain home location information.

- Define and maintain host location information.
- Define assignee qualifications.
- Begin assignments.
- End assignments.
- Transfer an employee permanently.
- Add a host assignment.
- View and update home and host information.
- Add or view home and host payroll data.
- Add or view home and host assignment data.
- Add or view home and host benefits data.

Pages Used to Manage Employee Home and Host Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add Host Assignment	PER_ORG_INST_ASGN	Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment, Add Host Assignment	Add a host assignment and review a summary of an employee's home and host assignments.
Home/Host Data	HOME_HOST_DATA	<ul style="list-style-type: none"> • Click the Create Host Assignment button on the Add Host Assignment page. • Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Home/Host Data 	<p>Add or view home information, and view and update host information.</p> <p>Note. The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p> <p>Note. Home data comes from the job data pages. You must have created an employment instance for the employee.</p> <p>Note. You must establish a host employment record to manage assignments from the Assignment Data component.</p>

Page Name	Definition Name	Navigation	Usage
Payroll Data	JOB_DATA_2	<ul style="list-style-type: none"> Click the Create Host Assignment button on the Add Host Assignment page, and then select the Payroll Data page. Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Payroll Data 	<p>Add or view home and host payroll data. Home data comes from the job data pages. You must have already created an employment instance for this employee.</p> <p>Note. The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p>
Assignment	HOME_HOST_ASGN	<ul style="list-style-type: none"> Click the Create Host Assignment button on the Add Host Assignment page , and then select the Assignment page. Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Assignment 	<p>Add or view host assignment data. You must have already created an employment instance for this employee.</p> <p>Note. The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p> <p>Note. The system displays this page on the Home and Host Data component only when the employee has a current assignment and you have used a Host employee record number to access it.</p>
Global Assignment Detail	ASGN_VLD_VW	Click the Choose an Existing Assignment link on the Assignment page.	<p>Associate the current host with the selected assignment.</p> <p>Note. The Choose an Existing Assignment link appears only when you are in Correction mode.</p>

Page Name	Definition Name	Navigation	Usage
Benefits	JOB_DATA_BENPRG	<ul style="list-style-type: none"> Click the Create Host Assignment button on the Add Host Assignment page, and then select the Benefits page. Workforce Administration, Global Assignments, Track Assignment, Home and Host Data, Benefits 	<p>Add or view home and host benefits data. Home data comes from the job data pages. You must have already created an employment instance for this employee.</p> <p>Note. The page accessed from the button is an enterable page. The page accessed from the menu navigation path is a view-only page.</p>
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location	Update position and location information for a person's job.

Defining and Maintaining Home Location Information

To manage employee global assignments, first establish an employee's permanent, or home, location and data on the Job Data component (JOB_DATA). The home location is the place to which the employee returns when a temporary assignment ends, and the home data is the employee's job data when the employee is not on assignment.

If you added an employment instance for a person into the PeopleSoft Enterprise Human Resources system, the employee has a job data record that serves as the home information. If the employee is a new employee, create an employment instance before processing the assignment.

Note. An employee may have more than one job at home, and so may have more than one home human resources record.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

Defining and Maintaining Host Location Information

Each time that you send an employee on a temporary assignment, you need to create a separate set of host and benefits data for that assignment. Host data includes information such as job, department, and location. Host benefits data consists of the employee's benefits program participation. By creating a separate set of data for the assignment, you retain permanent home and benefits data for the employee and track data for the current assignment.

The first time that you add host data for a new assignment, create a new job record on the Add a Host Assignment component (ADD_HOST_ASSIGN).

When you create a host job record, the job information fields are available for entry on the Home/Host Data page. Use the Home and Host Data component (HOME_HOST_DATA) to manage and review employees' host location information and to assign job records to assignments. When you save the new host information, the system stores the data in the employee's employment, job, and benefit program participation tables. These are the same tables in which all standard job data is stored.

When one global assignment ends, reuse the same job record and enter a new data row for the new assignment.

Note. You generally use one host employment record to track all global assignments for an employee, except in special circumstances, such as concurrent host assignments or different sets of benefits for a particular assignment. For these cases, add another employment record number to track the data separately.

Defining Assignee Qualifications

To identify the best-qualified employees to send on assignments, review employees' person profiles. You can use person profiles to record employees' educational qualifications and skills, and track additional education and skills acquired while on assignments.

You can access the Person Profiles component (JPM_PERSON_PROFILE) from Workforce Administration, Global Assignments, Assignee Qualifications.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles"

Beginning Assignments

To begin an employee's assignment:

- Create a host job record if one does not already exist.

Note. Use the same job record for all assignments, entering a new data row for each assignment.

See [Chapter 3, "Tracking Assignments," Defining and Maintaining Host Location Information, page 21](#).

- The Action code *Assignment* (ASG) is selected automatically. Select any appropriate Reason code.
- Enter the host information for this assignment.

Ending Assignments

To end an assignment, insert a data row on the Home/Host Data page and select *Assignment Completion* (ASC) in the Action field.

End an assignment only if the employee is not immediately sent on a new assignment.

If the employee is going on a new assignment immediately, enter a new row for the new assignment.

Transferring an Employee Permanently

Sometimes an employee on temporary assignment stays at a location permanently. As a permanent employee, he or she shares the same status as a local employee and should no longer be managed as an employee on temporary assignment. All employee, benefit, and payroll data tracking for the employee takes place at the new location because it is the employee's new home base.

To transfer an employee permanently:

1. End all open temporary global assignments.
2. Access the Work Location page, insert a row, and enter the department, location, and job code for the permanent host assignment.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information," Updating Job Data

Adding a Host Assignment

Access the Add Host Assignment page (Workforce Administration, Global Assignments, Track Assignment, Add a Host Assignment, Add Host Assignment).

Add Host Assignment

[Patrick Seto](#)

Person ID: KU0011

Organizational Instance

Find | View All | First 1 of 1 Last

Org Relation: Employee

Organizational Instance: 0

HR Status: Active

Pay Status: Active

Effective Date: 11/10/2008

Business Unit: GBIBU Global Business Institute BU

Department: 16000 Corporate Legal

Company: GBI Global Business Institute 9999

Last Start: 01/02/1980

Create Host Assignment

Next Empl Rcd: 1

Assignments

Customize | Find | First 1 of 1 Last

Empl Record	HR Status	Effective Date	Business Unit	Department	Home/Host
0	Active	11/10/2008	GBIBU	16000	Home

Add Host Assignment page

Create Host Assignment	Click to access the Home/Host Data page, on which you create a host assignment. For employees with more than one organizational instance, click the Create Host Assignment button that corresponds to the organizational instance for which you want to create a host assignment.
	<hr/> Note. You normally use the same job data record for all of an employee's host assignments. Do not create a new assignment record unless you have a compelling reason to do so. Instead, insert a new row into the employee's existing host record. <hr/>
Next Empl Rcd (next employee record)	When you create a new host record, the system identifies it using this employee record number.
Refresh	Click to refresh the Assignments table and view a new assignment. The Refresh button appears when a new assignment is created.
Assignments	Displays all current assignments.
Empl Record (employee record)	For employees with multiple assignments, the system generates employment record numbers to track data for each concurrent job. A new hire's employee record number for his or her initial job is set to 0. For each subsequent job that the employee receives, an additional, sequential employee record number is assigned.
Home/Host	For employees with multiple assignments, the system populates this field with: <ul style="list-style-type: none"> • <i>Home</i> if an assignment is based at the employee's home location. • <i>Host</i> if an assignment is based at a location other than the employee's home location.

Viewing and Updating Home and Host Information

Access the Home/Host Data page (click the Create Host Assignment button on the Add Host Assignment page).

Home/Host Data		Payroll Data		Assignment		Benefits	
Patrick Seto Employee				Empl ID: KU0011		Empl Record: 1	
Home Organizational Instance							
Organizational Instance:		0		Last Start Date:		01/02/1980	
				Termination Date:			
<div>Find View All First 1 of 1 Last</div>							
*Effective Date:		08/04/2009		*Action:		Assignment	
Effective Sequence:		0		Reason:			
HR Status:		Active		*Job Indicator:		Secondary Job	
Payroll Status:		Active		*Full/Part Time:		Full-Time	
Action Date:		08/04/2009					
Position Number:				<input type="checkbox"/> Position Management Record			
*Reg Region:		USA					
*Business Unit:		GBIBU		Global Business Institute BU			
Company:		GBI		Global Business Institute 9999			
*Department:		10500		Benefits			
*Location:		KUNY00		Corporation Headquarters United States			
*Job Code:		120000					
Supervisor:		KUJ009					
Reports To:							
Empl Class:							
Standard Hours							
Standard Hours:		40.00		Combined Standard Hours:		80.00	
Work Period:		Weekly		As of Date:		08/04/20	
FTE:		0.000000		FTE:		1.000000	

Home/Host Data page

To create a host assignment and enter the employee's job information for the assignment, you access this page using the Add a Host Assignment component. To add or change assignment data for an existing host, access this page using the Home and Host Data component by selecting the employee's host employment record number.

If you access the component by using an employee's home employment record number, the elements on this page are display-only, showing data from the employee's job record. The Assignment tab is not available if you access the component by using an employee's home employment record number.

The elements that are on this page are the same as those that appear on the Job Data component.

Action Date Displays the date on which you enter this row.

Action

Select an action to distinguish global assignments from other administrative actions. For new assignments, the action *Assignment* is automatically selected. When an assignment is completed and you add a new row, *Assignment Completion* is automatically selected.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process."

Reason

You can identify specific reasons for sending employees on assignments. For example, you might process some assignments that are due to a transfer of skills and others that are due to a shortage of local skilled personnel. To track assignment types more easily, specify reasons for them.

Use the Action Reason table to set up reasons that are specific to global assignments.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process."

Adding or Viewing Home and Host Payroll Data

Access the Payroll Data page (click the Create Host Assignment button on the Add Host Assignment page).

Home/Host Data Payroll Data Assignment Benefits

[Patrick Seto](#)
Employee

EmplID: KU0011
Empl Record: 1

Payroll Information Find First 1 of 1 Last

Effective Date: 06/04/2009
Effective Sequence: 0
HR Status: Active
Payroll Status: Active

Action: Assignment
Reason: Secondary Job
Job Indicator: Secondary Job

*Payroll System: Payroll for North America
Absence System: Other

Payroll for North America

Pay Group: KU2 US Biweekly
Employee Type: H Hourly
Tax Location Code: B-001
GL Pay Type:
Combination Code:

Holiday Schedule: KU01 US Holiday
*Tipped: Not Tipped
FICA Status: Subject

[Edit ChartFields](#)

Payroll Data page

The elements that are on this page are the same as those that appear in the Job Data component.

Payroll System

Enter the payroll system used for the host. Doing so does not affect employee home data.

You can make changes on the Payroll Data page, or on the Payroll page in the Workforce Administration menu.

Tax Location Code

Select the tax location code for the assignment.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Payroll Processing Data

Adding or Viewing Home and Host Assignment Data

Access the Assignment page (click the Create Host Assignment button on the Add Host Assignment page).

Home/Host Data		Payroll Data		Assignment		Benefits	
Patrick Seto Employee				EmplID: KU0011 Empl Record: 1			
Home Organizational Instance							
Organizational Instance:		0					
Last Start Date:		01/02/1980			Termination Date:		
Host Data Find View All First 1 of 1 Last							
Effective Date:		06/04/2009					
HR Status:		Active		Action:		Assignment	
Last Assignment Start Date:		06/04/2009					
Global Assignment Detail							
New Assignment Begin Date:		06/04/2009					
*End Date:		06/30/2009					
*Assignment Type:		Foreign Loan Assignment					
Departure Date:				Arrival Date:			
*Country:		USA		United States			
State:		HI		Hawaii			
City:		Paia					
Contact ID:							
Comment:							

Assignment page

This page appears only when you are creating a new host assignment, or when an existing assignment exists and you use a host employee record number to access the Home and Host Data component.

The elements that are on this page are the same as those that appear in the Job Data component.

New Assignment Begin Date Select the beginning date for the assignment. When you select the date, the following fields appear on the page.

Existing Assignment Begin Date This field appears when you have an existing assignment. When you are in the correction mode, you can select a new date to change the assignment date, or change the assignment that is associated with the host.

Choose an Existing Assignment This link appears when you are in the correction mode. Click this link to access the Global Assignment Detail page (ASGN_VLD_VW) and select an existing assignment. The current host will then be associated with the selected assignment. An assignment date can have up to two hosts associated with it.

End Date	Enter the ending date for the assignment.
Assignment Type	Select a value that is created in the Assignment Type table.
Departure Date and Arrival Date	Enter or change the employee's estimated date of departure from the home location and arrival at the new primary host.
Country	Select the assignment host country.

Adding or Viewing Home and Host Benefits Data

Access the Benefits page (click the Create Host Assignment button on the Add Host Assignment page to access the Benefits page).

Home/Host Data		Payroll Data		Assignment		Benefits	
Patrick Seto Employee		EmplID: KU0011 Empl Record: 1					
Benefit Status Find First 1 of 1 Last							
Benefit Record Number:	0						
Effective Date:	06/04/2009						
Effective Sequence:	0	Action:	Assignment				
HR Status:	Active	Reason:					
Payroll Status:	Active	Job Indicator:	Secondary Job				
*Benefits System:	Benefits Administration		Benefits Employee Status:		Active		
Annual Benefits Base Rate:	USD						
Benefits Administration Eligibility							
BAS Group ID:	B01						
Elig Fld 1:		Elig Fld 2:		Elig Fld 3:			
Elig Fld 4:		Elig Fld 5:		Elig Fld 6:			
Elig Fld 7:		Elig Fld 8:		Elig Fld 9:			
Benefit Program Participation Find View All First 1 of 1 Last							
*Effective Date:	01/02/1980	Currency Code:	USD				
*Benefit Program:	KU1	GBI Master US Benefit Program					

Benefits page

The elements that are on this page are the same as those that appear in the Job Data component.

Benefits System Enter a benefit program. Doing so does not affect other employee home data. You can make changes on the Benefits page, or on the Benefit Program Participation page which you select from the Workforce Administration menu.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Specifying Benefit Program Enrollment

Managing Assignments with Multiple Home or Host Data Records

This section discusses how to:

- Add assignments when an employee has multiple jobs at home.
- Add assignments when an employee has multiple host locations.
- Associate multiple home or host data with an assignment.

Adding Assignments When an Employee Has Multiple Jobs at Home

For most global assignments, the employee has one home job record and one host job record; however, you may encounter situations in which an employee has more than one job at home or more than one assignment.

Some employees have more than one employment record in the system before they go on a global assignment. For example, an American university professor going to teach at Oxford for a year might have two jobs in the U.S., one as a professor and another as a researcher. The employee already has two employment records in the system for the home jobs, so you need to create a third employment record for the host.

To track host data for an employee with multiple home records:

1. Create a new host employment record on the Add a Host Assignment component (ADD_HOST_ASSIGN).

On the Add Host Assignment page, click the Create a New Assignment button for the organizational instance for the home record for which you are creating the assignment.

The system adds another employment record so that you (and the system) can differentiate between the jobs.

2. Enter payroll information on the Payroll Data page.
3. Enter assignment dates on the Assignment page.

When you enter the assignment end date, the system checks whether other host records have effective dates that are equal to or before the end date that you enter.

4. Enter benefits data on the Benefits page.
5. Click OK to save entries.

Adding Assignments When an Employee Has Multiple Host Locations

Some employees split their time between two or more locations during an assignment. For example, a manager who was sent to Japan might also be assigned to work in Korea at the same time. Whether this is known before the assignment starts or arises during the assignment, the jobs are treated as different, concurrent host records in the system.

To track data for an employee with multiple host records:

1. Create a separate employment record for each host on the Add a Host Assignment component.

The system automatically assigns the next available employment record number, such as 2 or 3, for the host assignment.

2. Enter assignment dates and other details on the Home/Host Data, Assignment, Payroll Data, and Benefits pages.
3. Click OK to save entries.

Tying Multiple Home or Host Data to an Assignment

Assignments can be associated with only one Home record. If an employee has more than one home record (within an organizational instance), host records will be associated with the first home record.

If the employee has multiple, concurrent host records, associate all the host records with the assignment. Assignments are determined by the assignment begin date. The information that you enter on the Assignment and Assignment Data pages controls the earnings and deductions that track for home and host data on the Assignment Compensation page.

To associate a home and host record with an assignment:

1. Access the Add Host Assignment page.
2. On the Add Host Assignment page, click the Create New Assignment button for the home record for which you are creating the assignment.
3. Enter payroll information on the Payroll Data page.
4. Enter assignment dates on the Assignment page.
5. Enter benefits information on the Benefits page.
6. Click OK to save entries.

To associate multiple host records with an assignment:

1. Access the Assignment page of the Home and Host Data component using the employee record number for the host that you want to associate with an assignment.
2. Click the Correct History button.

To use Correct History, navigate to the Home and Host Data component and access the correct ERN for the employee. When you select the Correct History button from within this component, the Existing Assignment Begin Date and Choose an Existing Assignment fields display on the Assignment page.

3. Click the Choose an Existing Assignment link. The Global Assignment Detail page appears.
4. Select the check box for the assignment that you want to associate with the host.

If no entries automatically appear on the Additional Assignments page, then you selected an employment record number for a host record that's effective after the end date of the assignment. Either update the effective date of the host job information or change the end date of the assignment.

5. Save entries.

Managing Employee Assignment Data

This section discusses how to:

- Enter basic assignment data.
- View home and host information.
- Enter home residences and furniture information.
- Enter host residences and furniture information.
- Track home and host vehicle information.

Note. PeopleSoft Enterprise Human Resources also includes Administer Company Cars to track an organization's car-specific benefits.

Use the Assignment Data component (ASSIGNMENT_DATA) to manage employee assignment data.

Pages Used to Manage Employee Assignment Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assignment Data	ASSIGNMENT_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Data	Enter and view information about assignment types.
Assignment Home/Host	ASSIGNMENT_HOMHST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Home/Host	View home and host information.
Residence Home	RESIDENCE_HOME	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Home	Enter information about home residences and furniture.

Page Name	Definition Name	Navigation	Usage
Residence Host	RESIDENCE_HOST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Host	Enter information about host residences and furniture.
Vehicle Data	VEHICLE_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Vehicle Data	Track the location and status of vehicles.
Person Organizational Summary	PERSON_SUMMARY	<ul style="list-style-type: none"> Workforce Administration, Global Assignments, Track Assignment, Person Organizational Summary, Person Organizational Summary Workforce Administration, Personal Information, Person Organizational Summary, Person Organizational Summary 	Review a summary of a person's organizational relationships.
Review Assignment Summary	ASSGNMT_SUMMARY	Workforce Administration, Global Assignments, Track Assignment, Review Assignment Summary, Review Assignment Summary	Review a summary of an employee's assignment.
Employee on Assignment Report	RUNCTL_PER717	Workforce Administration, Global Assignments, Track Assignment, Employee on Assignment Report, Employee on Assignment Report	Run the Employees on Assignment report (PER717), which lists the employees who are on assignment.

Entering Basic Assignment Data

Access the Assignment Data page (Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Data).

Assignment Data	Assignment Home/Host	Residence Home	Residence Host	Vehicle Data
-----------------	----------------------	----------------	----------------	--------------

Yves Chabot Person ID: KF0018

Assignment Data Find | View All First 1 of 1 Last

*Begin Date: 11/01/1989 *End Date: 09/16/1993

*Assignment Type: FLA Foreign Loan Assignment

Departure Date: Arrival Date:

Home Domicile

Country: FRA France

Department: 92 Hauts de Seine

City: Levallois

Host Contact Information	Comments
Contact:	

Assignment Data page

Begin Date and End Date Change the begin and end dates for the assignment, if necessary.

Assignment Type Change the assignment value, if necessary.

Departure Date and Arrival Date Enter or change the employee's estimated date of departure from the home location and arrival at the new primary host.

Home Domicile

View information about the employee's home domicile.

The system uses the home domicile values from the employee personal data as default values. Use this information to process home leave travel on the Company Paid Travel page.

Host Contact Information

Enter a contact in the employee's host country who can be contacted by the home supervisor in case of emergency. The employee's name and work telephone number are provided.

Entering Home and Host Information

Access the Assignment Home/Host page (Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Home/Host).

Assignment Data	Assignment Home/Host	Residence Home	Residence Host	Vehicle Data
Yves Chabot		Person ID: KF0018		
Assignment Home/Host Find View All First 1 of 1 Last				
Assignment Type: Foreign		Begin Date: 11/01/1989		End Date: 09/16/1993
Display Data as of				
<input checked="" type="radio"/> Assignment Begin Date <input type="radio"/> Assignment End Date <input type="radio"/> Current Date				
Home Instance				
Empl Record:	0	HR Status:	Active	Last Start: 06/12/1983 End Date:
Company:	KF1	Business I		
Business Unit:	FRA01	France Business Unit		
Department:	13000	Operations- Paris		
Job Code:	790000	Sales Manager		
Position Number:				
Location Code:	KFPA01	Paris	Country:	France Currency: FRF
Supervisor Level:				
Host Data Find View All First 1 of 1 Last				
Empl Record:	1	HR Status:	Active	Last Start: 11/01/1989 End Date:
Company:	KG1	BIUK		
Business Unit:	GBR02	Sales and Marketing - UK		
Department:	21300	Sales and Marketing - Scotland		
Job Code:	770045	Representative-Sales		
Position Number:				
Location Code:	KG02	Edinburgh - Scotland	Country:	United Kingdom Currency: GBP
Supervisor Level:				

Assignment Home/Host page

Display Data as of

Select a date option to change the view of the home or host data. Values are:

- *Assignment Begin Date*

Select to view the home or host data as of the start date for the assignment.

- *Assignment End Date*

Select to view the home or host data as of the end date for the assignment.

- *Current Date*

Select to view the home or host data as of today's date.

The system populates the rest of the elements on the page with the data that is associated with them on the Home and Host Data component as of the date selected.

Home Instance and Host Data

The system displays the home and host location and job data according to the selected date.

Entering Home Residences and Furniture Information

Access the Residence Home page (Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Home).

Assignment Data

Assignment Home/Host

Residence Home

Residence Host

Vehicle Data

Residence Home

Find | View All | First 1 of 1 Last

Begin Date:

11/01/1989

End Date:

09/16/1993

Type:

Foreign

Home Residence

Find | View All | First 1 of 1 Last

Yves Chabot

Person ID:

KF0018

+ -

*Residence Number:

1

Description:

Home Residence Detail

Find | View All | First 1 of 1 Last

*Effective Date:

11/06/1989

+ -

*Status Before Assignment:

Rent

+ -

*Home Furniture:

N/A

+ -

*Status During Assignment:

N/A

+ -

☐ Property Management

Comment:

Residence Home page

- Residence Number

Displays the default value, 1.
Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as 2 or 3.
- Status Before Assignment and Status During Assignment

Select the status of the employee's residence before and during the assignment.
- Home Furniture

Select the disposition of the employee's home furniture that is associated with the residence.
- Property Management

Select if the company is using a property management company to assist in administering residence details.

Entering Host Residences and Furniture Information

Access the Residence Host page (Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Host).

Assignment Data | Assignment Home/Host | Residence Home | **Residence Host** | Vehicle Data

Yves Chabot | Person ID: KF0018

Residence Host | Find | View All | First | 1 of 1 | Last

Begin Date: 11/01/1989 | End Date: 09/16/1993
 Type: Foreign

Host Residence | Find | View All | First | 1 of 1 | Last

*Residence Number: 1 | Description: | Edit Host Address

Host Residence Detail | Find | View All | First | 1 of 1 | Last

*Effective Date: 11/11/1989 | *Host Residence Status: Cmpy Ownr | *Host Furniture: N/A
 Comment:

Residence Host page

- Residence Number** Displays the default value, 1. Leave the default value as it is, unless you use a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as 2 or 3.
- Edit Host Address** Click to edit the host residence address.
- Host Residence Status** Select the host residence status.
- Host Furniture** Select the disposition of the host furniture that is associated with the residence. Use a set of values that are different from those that are available for home residences. These values are in the Translate table.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

Tracking Home and Host Vehicle Information

Access the Vehicle Data page (Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Vehicle Data).

Assignment Data	Assignment Home/Host	Residence Home	Residence Host	Vehicle Data
Yves Chabot		Person ID: KF0018		
Vehicle Information Find View All First 1 of 1 Last				
Begin Date: 11/01/1989		End Date: 09/16/1993		
Type: Foreign				
Home Vehicle Find View All First 1 of 1 Last				
*Vehicle Nbr: 1		Description: <input type="text"/>		
Comments On Vehicle Find View All First 1 of 1 Last				
*Effective Date: 06/04/2009		*Reason: <input type="text"/>		
Comment: <input type="text"/>				
Host Vehicle Find View All First 1 of 1 Last				
*Vehicle Nbr: 1		Description: <input type="text"/>		
Vehicle Information Find View All First 1 of 1 Last				
*Effective Date: 06/04/2009		*Reason: <input type="text"/>		
*Vehicle Status: <input type="text"/>		Date Available: <input type="text"/>		
<input type="checkbox"/> Cash In Lieu				
Comment: <input type="text"/>				

Vehicle Data page

Home Vehicle**Vehicle Nbr** (vehicle number)

Displays the default value, 1. Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as 2 or 3.

Reason

Enter the reason or status of the employee's vehicle.

Host Vehicle**Vehicle Nbr** (vehicle number)

Displays the default value, 1. Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as 2 or 3.

Reason

Select a reason for the status.

Vehicle Status

Select a vehicle status by using a set of values that are different from those that are available for home vehicles. These values are also in the Translate table.

Date Available

Enter the date on which the vehicle is available to the employee.

Cash in Lieu Select if the employee chooses to take cash instead of a company vehicle.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Company Cars, "Administering Company Cars for a Workforce"

Managing Company-Paid Travel for Employees on Assignment

This section discusses how to manage company-paid travel for employees on assignment.

Pages Used to Manage Company-Paid Travel for Employees on Assignment

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Paid Travel	TRAVEL_CMPNY_PAID	Workforce Administration, Global Assignments, Track Assignment, Company Paid Travel, Company Paid Travel	Enter company-paid travel information.
Dependent Company Paid Travel	TRAVEL_CMPNY_DEP	Workforce Administration, Global Assignments, Track Assignment, Dependent Company Paid Travel, Dependent Company Paid Travel	Track travel for which dependents of employees are eligible.

Managing Company-Paid Travel for Employees on Assignment

Access the Company Paid Travel page (Workforce Administration, Global Assignments, Track Assignment, Company Paid Travel, Company Paid Travel).

Company Paid Travel

Florence Gautier Person ID: **KF0025**

Company Paid Travel Details Find | View All | First 1 of 1 Last

*Date Eligible: 06/04/2009

Assignment Type: Foreign

*Type of Travel:

Amount/Currency: USD

Date Taken:

Begin Date: 11/01/1983 End Date: 12/31/1987

*Mode of Travel: Air

☐ Cash In Lieu ☒ Alternate Location

From

Country: USA USA

State:

City:

To

Country: USA

State:

City:

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

*Dependent	Name	Relation	Birthdate	Marital Status

Company Paid Travel page

Note. If you don't see any data in these fields, then the date on which the employee is eligible for travel is after the end date that is entered in the assignment data for the current assignment. If the employee should be eligible for this travel during the assignment only, adjust either the date eligible here or the end date in the assignment data.

Date Eligible	Displays the date on which the employee is eligible for travel. Today's date appears automatically, which you can change.
Date Taken	Enter the date of travel.
Type of Travel	Enter one of the values that is created in the Travel Type table.
Mode of Travel	Enter one of the values that is created in the Translate table. <i>Air</i> appears by default, which you can change.
Amount/Currency	Enter the cost of the travel ticket or the maximum amount that the company authorizes for travel. The currency that is designated on the Installation Table - HRMS Options page appears by default, which you can change. Values are in the Currency Code table.
Cash In Lieu	Select if the employee opts for cash instead of company-paid travel.
Alternate Location	Select if the employee chooses to travel to a location other than his or her home domicile. If you select this check box, the To group box becomes available for alternate information entry.

Note. This check box is available only if you select the Home Leave check box in the Travel Type table. The system displays the employee home domicile information from the Assignment Date page in the To group box.

Country, State, City	<p>Enter the name of the country from which the employee is traveling.</p> <p>The system supplies the From values from Host Assignment Data by default. These values can be overwritten. The system supplies the To values from Home Data by default. When the travel type is <i>Rest and Recreation</i> or <i>Business Travel</i>, the To default values can be overwritten.</p> <p>If you change the country code in either the From or To group box, the system clears the State and City fields so that you can enter new information.</p> <p>Enter a new data row, to track other instances of company-paid travel.</p>
Dependent	Enter the appropriate dependent ID. To add more dependents, move the cursor to the Dependent field and click the Insert Row button.
Birthdate	Displays the dependent's date of birth.

Managing Dependent Information for Employees on Assignment

This section discusses how to:

- Enter dependent data.
- Enter and maintain data for accompanying dependents.
- View immediate family data.

Pages Used to Manage Dependent Information for Employees on Assignment

Page Name	Definition Name	Navigation	Usage
Dependent Accompanying	FAMILY_AT_HOST	Workforce Administration, Global Assignments, Track Assignment, Dependent Accompanying, Dependent Accompanying	Enter family and dependent information.
Review Immediate Family Data	IMMEDIATE_FAMILY	Workforce Administration, Global Assignments, Track Assignment, Review Immediate Family Data, Review Immediate Family Data	View information about an employee's immediate family.
Dependent Data - Name	DEPEND_BENEF1	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Add or edit dependent and beneficiary names.

Page Name	Definition Name	Navigation	Usage
Dependent Data - Address	DEPEND_BENEF_ADDR	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address	Add or edit dependent and beneficiary addresses.
Dependent Data - Personal Profile	DEPEND_BENEF2	Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Add or edit dependent and beneficiary personal information.

Entering Dependent Data

Enter and maintain dependent information on the Dependent Data component (Workforce Administration, Global Assignments, Track Assignment, Dependent Data).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Dependent and Beneficiary Data.

Entering and Maintaining Data for Accompanying Dependents

Access the Dependent Accompanying page (Workforce Administration, Global Assignments, Track Assignment, Dependent Accompanying, Dependent Accompanying).

Dependent Accompanying

[Florence Gautier](#) Person ID: KF0025

Family at Host Find | View All First 1 of 1 Last

*Effective Date: 31
 Assignment Type: Foreign

Begin Date: 11/01/1983 End Date: 12/31/1987

Family Size

Immediate: 0 Immediate at Host: 0

Total at Host: 0

Dependents at Host Customize | Find | View All First 1 of 1 Last

*Dependent ID	Name	Relation	Birthdate	Marital Status	At Host	Occupation
<input type="text"/>					<input type="checkbox"/>	

Dependent Accompanying page

Assignment Type, Begin Date and End Date	<p>Displays the assignment type, begin date, and end date of the assignment, based on the effective date.</p> <p>If these fields are not populated, then the information that you enter takes effect after the end date that is entered in the Assignment Data component. To see assignment data, adjust either the effective date here or the end date in Assignment Data.</p>
Family Size	Displays the size of the immediate family, which is defined as dependents who are the employee's spouse, son, or daughter.
Dependent ID	Displays information about all dependents who are added by using the Dependent Data pages.
At Host	<p>Displays the number of dependents who are accompanying the employee to the host location. The system automatically selects each dependent who is an immediate family member. Deselect the At Host check box for any dependents who are not accompanying the employee to the host location.</p> <p>Select the At Host check box for any non-family member, such as a nanny, who is accompanying the employee.</p> <p>As you make changes to at host information, the system calculates and displays the number for immediate at host and the number for total at host, which includes any non-family members who are accompanying the employee.</p>

Adding Dependents to the Host Location

To add another dependent to the Dependent Accompanying page, first add the new dependent by using the Dependent/Beneficiary pages. Move the cursor to the Effective Date field. When you enter the effective date of the change and move out of this field, the system refreshes the dependent list.

Removing Dependents from the Host Location

Access the Dependent Accompanying page. To reduce the number of dependents at host, click the Delete Row button and save the changes. The deleted dependents are removed from the list of dependents at host, but are still tracked in the system as dependent or beneficiaries for the given employee.

Viewing Immediate Family Data

Access the Review Immediate Family Data page (Workforce Administration, Global Assignments, Track Assignment, Review Immediate Family Data, Review Immediate Family Data).

Review Immediate Family Data

Ted Baer

Person ID: KUL401

Dependent / Beneficiary Data

Find | View All | First | 1-3 of 3 | Last

Dependent Name	Birthdate	Birthplace	Relation:	Marital Status:	Occupation
Thomas Baer	10/12/1981		Child	Single	
Benjamin Baer	10/12/1983		Child	Single	
Tamara Baer	01/06/1990		Child	Single	

Review Immediate Family Data page

The system displays the employee's name and employee ID, along with the names and birth information for all dependents who are in the employee's immediate family, their relationship to the employee, occupations (if any), and marital statuses.

Tracking Assignment Compensation and Currency Fluctuation

This section discusses how to track assignment compensation.

Warning! The Assignment Compensation page isn't linked to payroll processing in Payroll for North America.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Currencies"

Page Used to Track Assignment Compensation and Currency Fluctuation

Page Name	Definition Name	Navigation	Usage
Assignment Compensation	ASSGNMT_EARNS_DED	Workforce Administration, Global Assignments, Track Assignment, Assignment Compensation, Assignment Compensation	Enter supplemental earnings and deductions that the home location pays, such as hardship premiums and relocation costs, or that an employee receives from the host location, such as foreign housing or rent.

Tracking Assignment Compensation

Access the Assignment Compensation page (Workforce Administration, Global Assignments, Track Assignment, Assignment Compensation, Assignment Compensation).

Assignment Compensation

Florence Gautier **EmplID:** KF0025 **Payment Instruction Type:** Onetime

Assignment Compensation [Find](#) | [View All](#) First 1 of 1 Last

*Effective Date: 11/01/1983 *Amount Frequency: A Annual

Assignment Type: Foreign Begin Date: 11/01/1983 End Date: 12/31/1987

Home/Emp Net Amount: 35387.00

Home / Host [Find](#) | [View All](#) First 1 of 1 Last

*Home or Host: 0 Home

*From Currency Code: FRF *To Currency Code: FRF

*Exchange Rate: 1.00000000 *Rate Type: OFFIC

Home/Host Net Amount: 35387.00

Earnings [Find](#) First 1 of 1 Last

*Code	Home Amount	Host Amount
AWA Award – Cash	35387.00	

Deductions [Find](#) First 1 of 1 Last

*Code	Home Amount	Host Amount

Assignment Compensation page

Amount Frequency	Enter the amount of compensation frequency from the values that are in the Frequency table. Values are <i>Annual</i> , <i>Hourly</i> , or <i>Monthly</i> . All the amounts that you specify for both earnings and deductions must be for the frequency that you select in this field.
Assignment Type	<p>Displays the assignment type, which is based on the effective date that is entered on this page. If no information appears, then the information that you enter takes effect after the end date that you enter in the Assignment Data component. A warning message appears.</p> <p>If you make a onetime payment that occurs after the end date of the assignment, ignore the message. Otherwise, to see assignment data, adjust either the effective date here or the end date in the Assignment Data component.</p>
Home or Host	Enter the employee record numbers that correspond to the home or host records. Generally, enter <i>0</i> for the home record and <i>1</i> for the host record.
From Currency Code and To Currency Code	If assignment data exists, in the From Currency Code field, view the currency for the country that is designated in the employee's home data. View the home currency in the To Currency Code field. The system automatically populates these fields. Override these default values by selecting another currency code from the Currency Code table.
Exchange Rate	Displays the exchange rate type. The rate that is specified in the Installation table appears by default.
Rate Type	Displays the rate type. The rate type that is specified in the Installation table appears by default. You can override this default value.
Code	Enter a code that denotes additional earnings that are charged to the home location. Create these codes in the Earnings table.
Base Compensation	Displays the amount that the employee earns at the home location, which you specify in Job Data Compensation.
Home Amount	Enter the home amount. Because you are entering information about home data, the Host Amount field doesn't appear.
Base Compensation	Displays the amount that the employee earns at the home location, which you specify on the Job Data - Payroll page.
Code	Enter a code from the Deductions table that denotes deductions that should be taken from the employee compensation that you specify for the home location.
Home Amount	<p>Enter the home amount for the deduction code.</p> <p>The net earnings and deductions that are specified for the home location appear. The Home/Host Net Amount field displays the net amount of all supplemental earnings and deductions for both home and host. Both amounts appear in the home currency.</p> <p>Because you are entering information that is related to home data, the Host Amount field doesn't appear.</p>

Chapter 4

Managing Educational Allowances

This chapter discusses how to manage international schools and programs allowances.

Your organization may provide financial assistance to employees on global assignments, such as school tuition for children and language and orientation classes for adults. PeopleSoft Enterprise Human Resources helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

Managing International Schools and Programs Allowances

This section discusses how to manage educational data.

Use the International School/Program and Dependent International School pages to track educational allowances for your employees and their dependents.

Pages Used to Manage Educational Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
International School/Program	INTL_SCHOOL_PROGRM	Workforce Administration, Global Assignments, Educational Allowances, International School/Program, International School/Program	Enter payment information.
Dependent International School	INTL_SCHOOL_DEP	Workforce Administration, Global Assignments, Educational Allowances, Dependent International School, Dependent International School	Track beginning and end dates. Set up payment schedules for reimbursement in the designated currency.

Managing Educational Data

Access the International School/Program page (Workforce Administration, Global Assignments, Educational Allowances, International School/Program, International School/Program).

International School/Program

Florence Gautier Person ID: KF0025

International School Program Details Find | View All | First 1 of 1 Last

*School/Program Code: La Sorbonne + -

Internal/External: School/Program Type:

Begin Date: End Date:

Amount: *Currency:

Payment Frequency:

Total Scheduled Amt: 0.00

Payment Schedule Find | View All | First 1 of 1 Last

Due Date	Total Amt	Employer Amt	Employee Amt	Paid	*Reimbursement Status
<input type="text"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="checkbox"/>	<input type="text" value="Not Reimb"/>

International School/Program page

- School/Program Code** Enter a school/program code. When you complete this field, the system displays the school/program type and indicates whether the school is internal or external. Create this information in the International School/Program table.
- Begin Date** Enter the period during which the employee attends the school or program.
- Amount and Currency** Complete this field only if you pay in a lump sum; enter the total amount. If you set up a payment schedule, leave this field blank. Once you create the schedule, the system calculates and sets the amount to the total scheduled amount.
- The currency appears by default as the base currency that was designated on the Installation Table - HRMS Options page, which you can change. Currency codes are in the Currency Code table.
- Payment Frequency** Enter a payment frequency, if you set up a payment schedule. Values are in the Translate table.
- Total Scheduled Amt** (total scheduled amount) Displays the total that the system calculates as you enter the payment schedule. Save the information entered on the page; the system sets the amount to the total scheduled amount.
- Payment Schedule** To add more payments, position your cursor in the Payment Schedule group box and click the Insert Row button.
- Due Date** Enter the due date for each payment that is due.
- Total Amt** (total amount) Enter the total amount of each payment.

Employer Amt (employer amount)	Enter the amount that the company pays.
Employee Amt (employee amount)	Displays the amount that the employee pays. If the total and employer amounts are different, when you complete the Employer Amt field, the system calculates and displays the employee amount.
Paid	Select when you've paid the total amount to the provider of the school or program.
Reimbrsmnt Status (reimbursement status)	Select the status that reflects your organization's reimbursement policy for this particular payment. After you reimburse the employee, change the status from <i>Not Reimb</i> to <i>Reimbursed</i> . If the amount that the employee paid can't be reimbursed, select <i>Unreimb</i> (unreimbursable).

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