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Supplement

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release R12.1 of the *Oracle HRMS for China Supplement.*

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle HRMS.

  If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University
- Oracle Self-Service Web Applications.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

Related Information Sources

Oracle HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle HRMS.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

Guides Related to This Product

Oracle Daily Business Intelligence for HRMS User Guide

This guide describes the dashboards and reports available for HR Line Managers, Chief HR Officer, Budget Managers, and Benefits Managers using Daily Business Intelligence for HRMS. It includes information on using parameters, how DBI for HRMS derives values, and how to troubleshoot dashboards and reports.

Oracle Daily Business Intelligence for HRMS Implementation Guide

This guide provides basic setup procedures for implementing and maintaining HRMS-related dashboards.

Oracle Daily Business Intelligence Implementation Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security

considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Daily Business Intelligence User Guide

This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports for the following functional areas: Financials, Interaction Center, iStore, Marketing, Product Lifecycle Management, Projects, Procurement, Sales, Service, Service Contracts, and Supply Chain.

Oracle Application Framework Personalization Guide

Learn about the capabilities of the OA Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to implement Oracle HRMS successfully in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Self-Service Human Resources Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Performance Management Implementation and User Guide

Learn how to set up and use performance management functions. This includes setting objectives, defining performance management plans, managing appraisals, and administering questionnaires.

Oracle Succession Planning Implementation and User Guide

Learn how to set up and use Succession Planning functions. This includes identifying succession-planning requirements, using talent profile, suitability analyzer, and performance matrices.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Oracle Human Resources Management Systems Approvals Management Implementation Guide

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications.

Oracle Human Resources Management Systems Window Navigation and Reports Guide

This guide lists the default navigation paths for all windows and the default reports and processes as they are supplied in Oracle HRMS.

Oracle iRecruitment Implementation and User Guide

Set up and use Oracle *i*Recruitment to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns, such as shift hours, so that this information can be used by other applications, such as General Ledger.

Oracle Labor Distribution User Guide

Learn how to maintain employee labor distribution schedules, distribute pay amounts, encumber (commit) labor expenses, distribute labor costs, adjust posted labor distribution, route distribution adjustment for approval, and manage error recovery processes. You also learn how to set up effort reporting for Office of Management and Budget (OMB) compliance.

Other Implementation Documentation

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle E-Business Suite-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Organization Structures

Organization Management

Key Concepts for Representing Enterprises

You represent your enterprise using key organization structures in Oracle HRMS. These structures provide the framework so you can perform legal reporting, financial control, and management reporting. You can set up these organization structures yourself, or use the Configuration Workbench.

The Configuration Workbench delivers an integrated configuration management toolset for HR systems and assists in the evaluation, configuration, deployment, and maintenance of HR applications. The workbench suggests a basic structure of organizations for your enterprise based on configuration models.

See: Configuration Models for Your Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

Once the basic enterprise structure is set up, you add the additional organizations and locations t`hat exist in your enterprise. You define the internal organizations that represent your internal divisions and departments, and you define the external organizations that represent the organizations outside of your enterprise. For example, you can set up an external organization to represent the tax office for which your enterprise uses for reporting purposes.

You can use organizations to represent many levels of your enterprise, from the highest level of organization that represents the whole enterprise, to the lowest level of organization that represents a section or department.

See: Extending the Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Classifications, page 1-8

See: Setting Up Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*

Business Group

The business group represents a country in which your enterprise operates. You create it as an organization in Oracle HRMS, but it does not represent a specific organization within your enterprise structure, and you do not include it in your organization hierarchies. A business group enables you to group and manage data in accordance with the rules and reporting requirements of each country, and to control access to data.

The critical factors for deciding when to use a separate business group, or an international business group, are based on the following factors:

- If you use Oracle Payroll

- The number of people you employ in a country
- If you require legislative support for Oracle HR

Generally the laws are so different in each country that to be compliant, there must be a different business group for each country in which an enterprise has employees.

Operating Company

An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country. An operating company is a holding company, a company within a company.

Ultimate Legal Entity

The ultimate legal entity represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization. The ultimate legal entity is the parent company or organization for all its subsidiaries and divisions. Oracle HRMS represents the ultimate legal entity with the GRE/Legal Entity organization classification.

Legal Entity/Employer

A legal entity represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.

A legal employer is a legal entity that is responsible for employing people in a particular country. Therefore, if you employ people in a country, then you must have at least one organization classified as a legal entity and a legal employer.

The Configuration Workbench classifies an organization as a GRE/Legal Entity where your enterprise operates in a country, and classifies it as an Employer if you employ people in that country also. For example, you can have a legal entity in a country where you do business, but do not employ people in that country.

Consolidated Legal Entity

A consolidated legal entity acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country. You typically use the consolidated legal entity for when you have multiple operating companies in your enterprise, but for the purposes of consolidation, you group the information into one organization. For management reporting purposes, the organizations below the consolidated legal entity in an organization hierarchy, such as, your departments and sections, can report to any organization in the enterprise. However, for legal reporting purposes, they report up to the consolidated legal entity.

For information on how to model your enterprise using the key organization structures,

see: Configuration Models for Your Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

GREs and Legal Entities

Your Enterprise

Your enterprise could be structured in several ways. For example, your workforce could be working on:

- A single project in one location.
- Several projects in one location.
- Different projects in different locations.

If your workforce were dispersed among several locations, you would likely have divisions in these locations. Moreover, these locations would be overseen by a head (or central) office.

Your enterprise, whether confined to one location or geographically dispersed, has two kinds of data:

- **Country-Specific Data**: For example, your enterprise's legal name or the URL of your enterprise's central Web site will apply equally to your divisions in Shanghai and Beijing. Oracle HRMS calls such data corporate information and stores it in the Corporate Information organization information type of the Government Reporting Entity (GRE) / Legal Entity organization classification.
- **Region-Specific Data**: For example, the Public Housing Fund (PHF) registration authority in Shanghai differs from the PHF registration authority in Beijing. Thus, your enterprise's divisions in Shanghai and Beijing would come under different PHF registration authorities. Oracle HRMS calls such data employer information and stores it in the Employer Information organization information type of the GRE / Legal Entity organization classification.

Your enterprise must submit statutory reports to the Chinese government and local authorities. These reports contain both corporate and employer information.

Functions of GRE / Legal Entity

In Oracle HRMS, you submit statutory reports by an organization with the classification of GRE / Legal Entity. After defining one or more business groups for your enterprise, you set up at least one GRE / Legal Entity within each business group. In addition to statutory reporting, a GRE also pays employees their salaries, administers payroll, and remits taxes to governments and local bodies.

Requirements

Since the functions of the GRE include statutory reporting, a GRE in your organization hierarchy must contain both corporate and employer information. More accurately, in Oracle HRMS, your organization hierarchy must have an organization with the classification of GRE / Legal Entity and that contains data in the Corporate Information and Employer Information organization information types.

While the GRE can contain both corporate and employer information, Oracle HRMS also permits you to store corporate and employer information in different GREs; you can then link these GREs so that you have a complete set of data for statutory reporting. Consequently, you avoid replicating corporate information with every set of region-specific employer information.

In Oracle HRMS, a GRE with corporate information is a corporate body, while a GRE with employer information is an employer. Your corporate body and employer can be represented by the same GRE or different GREs.

For statutory reporting, you assign your employees to an employer in the CN Statutory Info window, and the employer must in turn be linked to a corporate body in the Employer Information window.

> **Note:** In your organization hierarchy, you can define other low-level organizations with the classification of HR Organization. Then, you can select these organizations in the Organization field of the Assignment window to fulfill your enterprise's requirements. In the Assignment window, you can also assign employees to an employer if it also has the classification of HR Organization.

Flexible Setup

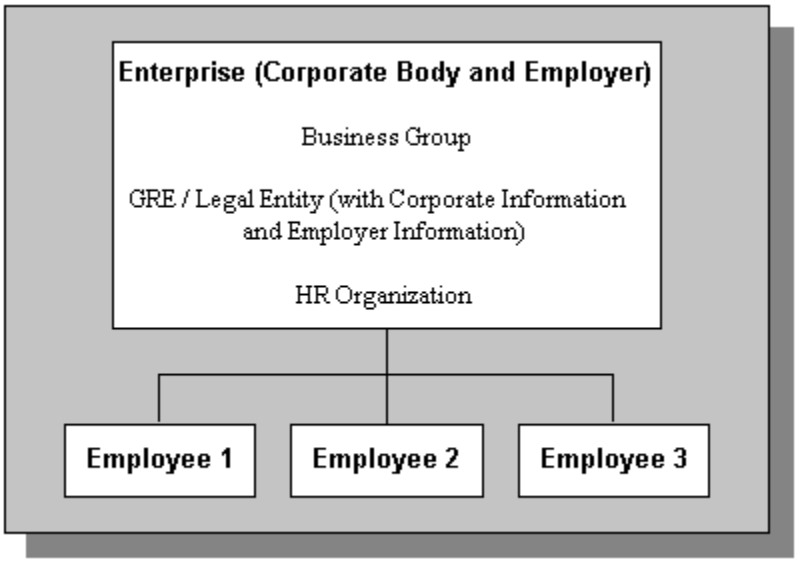
Once you fulfill the previously outlined requirements, you can set up corporate bodies and employers according to the unique needs of your enterprise.

For example, if your enterprise is in a single location and working on a single project, you could set up an organization that has the following classifications:

- Business Group
- GRE / Legal Entity (with the Corporate Information and Employer Information organization information types completed)
- HR Organization (so that employees can be assigned to the organization in the Assignment window)

You could select this organization both in the CN Statutory Info and Assignment windows. You may also assign other classifications to this organization. The following figure depicts this organization:

Sample Organization Setup for Single Location, Project



If your enterprise is in one place and your workforce divided among projects functions, then you could set up an organization with these classifications:

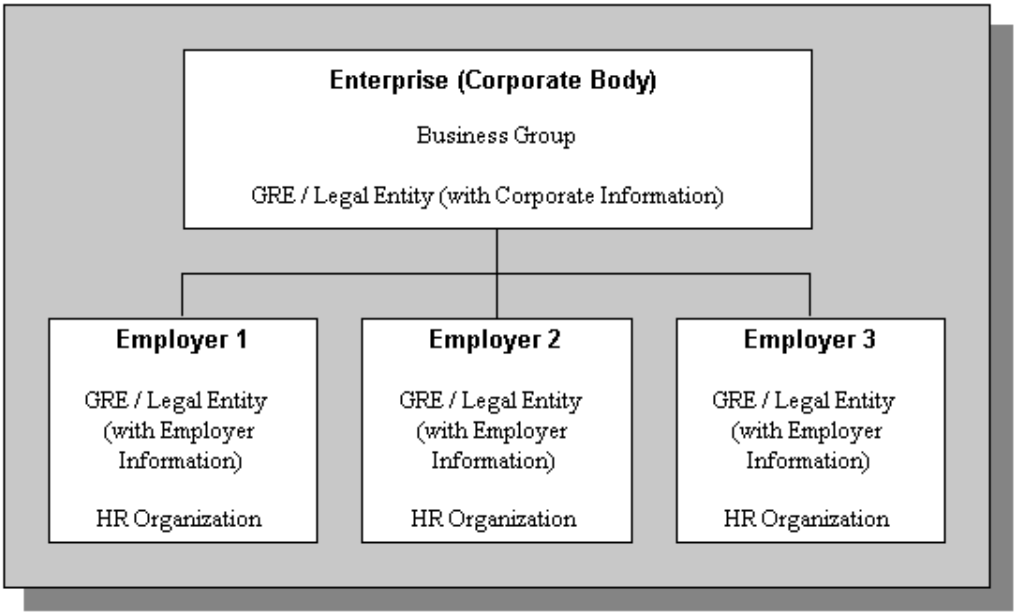
- Business Group
- GRE / Legal Entity (with the Corporate Information organization information type completed)

Under this organization, you could set up an employer for each project or function. The organizations that you create for your employers would have these classifications:

- GRE / Legal Entity (with the Employer Information organization information type completed)
- HR Organization (so that employees can be assigned to your employers in the Assignment window)

You could also assign other classifications to your organizations. Then, your setup would resemble that depicted by the following figure:

Sample Organization Setup for Single Location, Multiple Projects / Functions



If your enterprise is geographically dispersed, then you could set up your head (or central) office as an organization with these classifications:

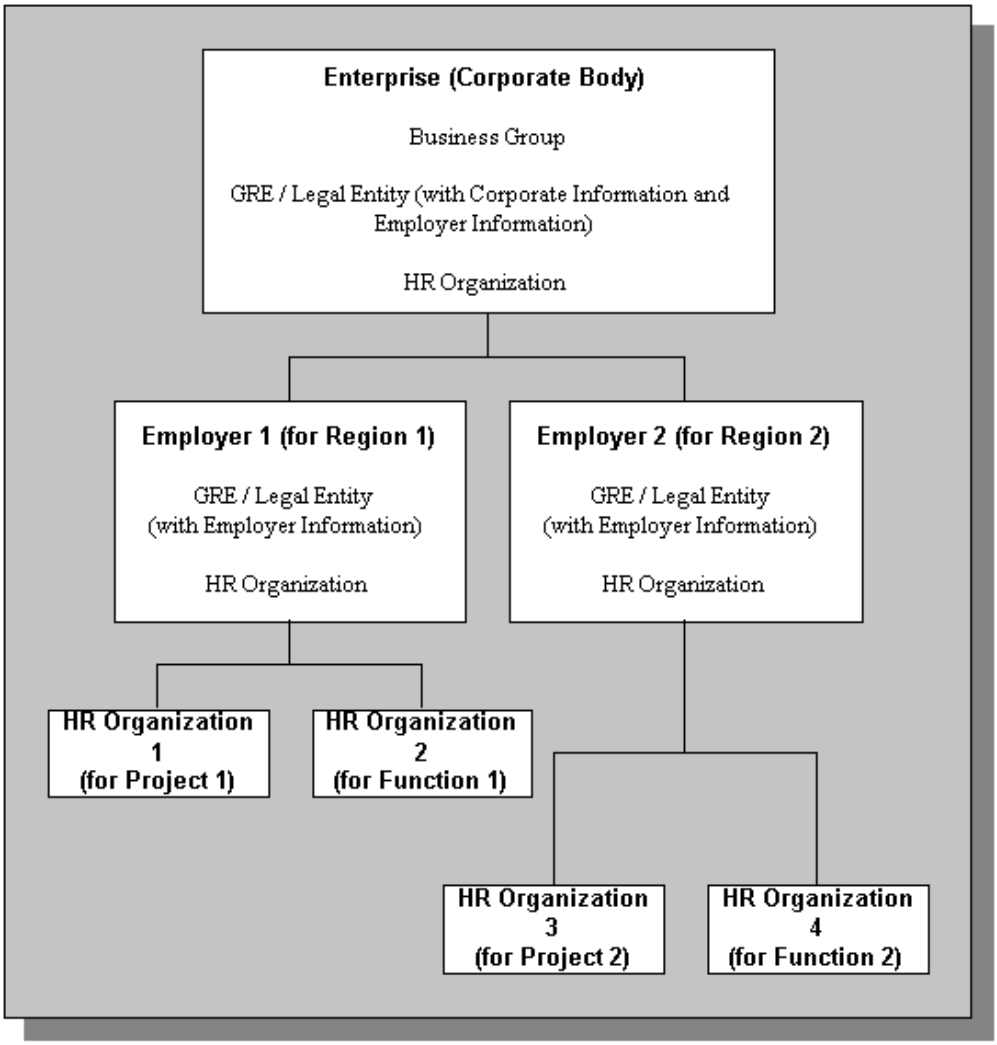
- Business Group
- GRE / Legal Entity (with the Corporate Information and Employer Information organization information types completed)
- HR Organization (You need to assign employees to your head office.)

In this case, for employees who work at your head office, it would be both the corporate body as well as the employer. You could set up region-specific employers with the following classifications:

- GRE / Legal Entity (with the Employer Information organization information type completed)
- HR Organization (if you need to assign employees to these employers in the Assignment window)

You could also set up low-level organizations that map to projects or functions at each location. These organizations will need the classification of HR Organization. You could assign other classifications to all your organizations on the basis of your enterprise's needs. Then, your setup would look as follows:

Sample Organization Setup for Multiple Regions, Projects / Functions



In the previously described scenario, employees can be assigned to all organizations in the Assignment window because they all have the HR Organization classification. However, for statutory reporting, the corporate body is always the Enterprise, and the employer is the Enterprise, Employer 1, or Employer 2.

These examples illustrate some simple scenarios. You could set up your organization hierarchy in complex ways to fulfill your enterprise's needs. For example, you could set up more than one corporate body in your organization hierarchy.

Organization Classifications

Organization classifications define the purpose of an organization and its functionality within Oracle HRMS. The classifications you assign to an organization control the

additional information you can set up at the organization level. The Configuration Workbench automatically assigns the appropriate classifications to the organizations it creates.

For more information on the key organization structures you use to represent your enterprise, see: Key Concepts for Representing Enterprises, page 1-2

You can define one organization with multiple classifications or you can define separate organizations to represent different types of entity. For example, you can classify an organization as a legal entity as well as an HR organization if it's the same organization. If they are different, then you create two organizations.

> **Note:** Oracle HRMS enables you to install your own additional information types for classifications.

You can select the following classifications in the Organization window, depending on your legislation:

All Legislations

All legislations can use the following classifications:

- **Business Group**: Use this classification to group, manage, and control access to data in accordance with the rules and reporting requirements of a country.
- **Operating Company**: An operating company represents a division or line of business within your enterprise that is legally registered for reporting in at least one country.
- **GRE/Legal Entity**: Use this classification to represent the following organizations:
  - **Ultimate Legal Entity**: this represents the enterprise, and typically, the enterprise is the highest (global) level of a business organization.
  - **Legal Entity**: this represents the designated legal employer for all employment-related activities. The legal authorities in a country recognize this organization as a separate employer. In an organization hierarchy, a legal entity may report to an operating company or to the ultimate legal entity.
  - **Consolidated Legal Entity**: this organization acts on behalf of multiple operating companies that are not legally registered, or simply on behalf of the enterprise in a country.

    For Chinese users only: Your organization hierarchy must contain at least one GRE with corporate and employer information. Statutory reporting requires this information.
- **Employer:** Use this along with the GRE/Legal Entity classification to define an

organization as a legal entity that is responsible for employing people in a particular country.

For Indian users only: Your organization hierarchy must contain at least one GRE with income tax, challan bank, tax declaration and representative details. This information is used for statutory reporting.

- **HR Organization**: Use this classification for all organizations to which you want to assign employees and contingent workers.
- **Payee Organization**: Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.
- **Bargaining Association**: Use this when defining an organization that is involved in negotiating a collective agreement. A bargaining association could be any organization representing the employees in negotiations, for example a trade union. The UK legislation also enables you to select a bargaining association in the Union Processing window to set up a union element.
- **Representative Body**: Use this when defining a representative body. This may be a body defined in legislation, such as a European Works Council, or may be defined by the employer, such as a Sports and Social Club.
- **Disability Organization**: Use this when defining an external organization with which employee disabilities are registered.
- **Medical Service Provider**: Use this when defining an organization that provides any medical services, such as medical assessments, to the people in your enterprise.
- **Constituency**: Use this to define a constituency to group together workers eligible to vote for particular elections.
- **Company Cost Center**: Use this to define organizations in Oracle HRMS that map to cost centers in Oracle GL. You can set up your application so that whenever a cost center is defined in GL, a corresponding organization with this classification is defined automatically.
- **Professional Body Information**: Use this to define an organization that is a professional body. Organizations with this classification are available to assign to people in the Qualifications window.
- **Operating Unit** : Use the operating unit organization classification if you also use Multi-Org applications. You can associate an operating unit with an HR Organization. The application uses the HR Organization to find the operating unit to which a person belongs.

US Legislation

The US legislation can use the following classifications:

- **Reporting Establishment**, **Corporate Headquarters**, or **AAP Organization**: Use these when defining reporting organizations, that is, organizations required for the production of certain reports for government agencies.

- **Parent Entity**: Use this when defining an organization to be included at the top level of an establishment hierarchy. You can then use the hierarchy when producing certain reports for government agencies.

  If you are assigning this classification to a Business Group, you must assign it to your default Business Group, that is the one defined in your security profile. If you do not, then your data will not be visible when you attempt to create your hierarchy in the Generic Hierarchy window.

- **Benefits Carrier**, **Workers' Compensation Carrier**, or **Beneficiary Organization**: Use these when defining an external organization belonging in one of these classifications. You can then select the organization when defining a benefit, entering information for Workers' Compensation calculations, or recording beneficiaries employees have named for certain benefits.

  The Federal legislation can also use the **Beneficiary Organization** classification.

UK Legislation

The UK legislation can use the **Education Authority** classification to define a Local Education Authority (LEA) that is responsible for education within that council's jurisdiction.

Canadian Legislation

The Canadian legislation can use the following classifications:

- **Provincial Medical Carrier**: Use this to define a medical carrier for a province.

- **Provincial Reporting Establishment**: Use this to represent employees in the province of Quebec.

French Legislation

The French legislation can use the following classifications:

- **Company**: records one or more companies in your business group. A company is a legal entity registered to "Registre du Commerce et des Societes". You must have at least one company.

- **Establishment**: identifies the organization that serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

  Note: Do not classify an organization as both a company and an establishment; create two separate organizations.

- **URSSAF Center** or **ASSEDIC Center**: specifies an external organization that is a Social Security organization. You can select the organization when entering additional organization information for an establishment. You can also select URSSAF organizations when entering additional organization information for a company.

- **Insurance Provider** or **Pension Provider**: defines an external organization that provides insurance or pensions. You can select the organization when entering additional organization information for a company or an establishment.

- **OPACIF** or **OPCA**: specifies an external organization that collects the company's yearly training contribution.

- **CPAM**: identifies an external organization as a CPAM office. You can select the organization when entering employment information in the People window.

- **Public Sector Other External Organization**: records details of the various types of external organizations with whom public-sector companies deal. Be sure to create organizations with this classification as external organizations.

- **Grouping of Employers**: identifies the employers (normally establishments) who have decided to group together to make it easier to lend each other workforce and also to list the employees, contingent workers, and employees on loan for an establishment from that grouping in the Personnel Registry report.

- **Tax Group**: defines an external tax office.

Dutch Legislation

The Dutch legislation can use the following classifications:

- **Dutch UWV Organization**: Use this to indicate if your organization is a social insurance provider. If you enable this classification, you can enter additional information such as the type of provider in the Dutch UWV Organization window.

- **Dutch Tax Office**: Use this to define an external tax office.

- **Dutch Private Health Insurance**: Use this to define an external organization that provides private health insurance.

- **Pension Provider**: Use this to define an external organization that provides pensions to your employees.

German Legislation

The German legislation can use the following classifications:

- **Budget Plan Unit**: Use this to define internal organizations for which you can use for the budget plan structure. The budget plan structure defines the different levels of positions in your enterprise, and the budget plan units represent the different levels as organizations. You select which budget plan unit the position belongs to in the Position window.

- **German Additional Second Pension Insurance**: Use this to record information about the contributions an organization makes to a second pension.

- **German Capitalized Life Insurance Provider**: Use this to indicate if your organization is a provider of German capitalized life insurance.

- **German Mandatory Health/Special Care Insurance Provider**: Use this to indicate if your organization is a provider of German mandatory health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Mandatory Pension Insurance Provider**: Use this to indicate if your organization is a provider of German mandatory pension insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Private Health/Special Care Insurance Provider**: Use this to indicate if your organization is a provider of German private health or special care insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Public Sector**: Use this to indicate if your organization is a public sector organization. If you set this to yes then certain public sector specific windows and fields are made available to you.

- **German Tax Office**: Use this to indicate if your organization is a tax office. If you set this to yes then you can enter additional tax office information using the Others button.

- **German Unemployment Insurance Provider**: Use this to indicate if your organization is a provider of German unemployment insurance. If you enable this classification, you can enter additional information using the German Social Insurance Providers window.

- **German Voluntary Pension Provider**: Use this to indicator if your organization is a provider of German voluntary pensions.
- **German Work Incident Supervising Office**: Use this to indicate if your organization is a work incident supervising office.
- **German Workers' Liability Insurance Providers**: Use this to indicate if your organization is a provider of German workers' liability insurance.

Hong Kong Legislation

The Hong Kong legislation can use the **MPF Trustee Organization** classification to set up and enrol employees in an MPF Trustee. This classification allows you to record details of the trustee and details of the scheme provided by the trustee.

Mexico Legislation

The Mexico legislation must use the **legal employer** classification to define the legal entity. You can add additional organization information for your legal employer, if needed.

Use the **GRE/Legal Entity** classification to define an organization that is recognized as a separate employer by Social Security or other legal authorities. When you assign a location to a GRE, and you have not already associated them with each other in the generic hierarchy, HRMS will make the association for you.

Saudi Legislation

The Saudi legislation can use the following classifications:

- **Saudi GOSI Office**: Use this to represent the General Office of Social Insurance (GOSI) which the employer is registered. The GOSI office requires employers to make deductions for eligible employees and send all payments and reports to this office.
- **Saudi Employment Office**: Use this to represent an office to which the employer reports the status of its disabled employees.

Hungary Legislation

The Hungary legislation can use the following classifications:

- **Draft Agency**: Use this to represent an external defense organization to which you send employee military service details.
- **Company Information**: Use this to represent the organization which is legally entitled to hire employees.

- **Pension Provider**: Use this to indicate an external organization that provides pensions to your employees.

Spanish Legislation

The Spanish legislation can use the following classifications:

- **Work Center**: Use this to define an internal organization that represents a facility within your enterprise. You use these organizations for statutory reporting purposes.
- **Section**: Use this to define an internal organization that represents the place where people work. You use these organizations for internal reporting purposes only.
- **Tax Office**: Use this to indicate if the organization is an external tax office.
- **Tax Administration Office**: Use this to indicate if the organization is an external tax administration office.
- **Social Security Office**: Use this to define a social security office as an external organization. If you enable this classification, you can record the social security office details.
- **Social Security Province Office**: Use this to define an organization as an external social security office. If you enable this classification, you can enter the social security province office details.
- **Health Care Organization**: Use this to define an organization as an external health care organization. If you enable this classification, you can enter the insurance company details.

Korea Legislation

The Korean legislation can use the following classification:

- **Business Place**: Use this classification to define an organization as an employer to which you assign employees. You set up information such as the registration number, representative information, and the health insurance number for the National Tax Service (NTS).

Indian Legislation

Your organization hierarchy should contain at least one GRE/Legal Entity (Tax Organization) and Registered Company.

The Indian legislation can use the following classifications:

- **Registered Company**: Records your company's Legal Name, Registration Number, Corporate Identity Number, Permanent Account Number (PAN) of the company and company's representative details.

- **Factory**: Records your factory's Registration Number, License Number, National Industrial Code, Production Commencement Date and factory's representative details.

- **Shops/Establishment**: Records your shops/establishment's registration number and representative details.

- **Contractor Details**: Records a contractor's details, work details, and representative details. A contractor supplies contingent workers to an enterprise and can be either an individual or an external organization.

- **ESI Organization**: Use this to define an external organization that provides Employee State Insurance (ESI) to your employees. Records your Employee State Insurance (ESI) organization's Challan Information, General Information and Representative Details. You can have multiple ESI organizations and select an employee's ESI organization in the Assignment window.

- **Provident Fund Organization**: Records your PF organization's PF challan information, PF information, and PF representative details. You can have multiple PF organizations and select an employee's PF organization in the Assignment window.

- **Professional Tax Organization**: Records your Professional Tax organization's information, Professional Tax Challan information, and Representative Details information. You can have multiple professional tax organizations and select an employee's professional tax organization in the Assignment window.

- **Income Tax Office**: Records your income tax organization's information. You can enter the location details of the income tax office. You can select the income tax organization in the GRE/Legal Entity: Income Tax Details window.

- **National Pension Scheme**: Records the National Pension office information. You can enter the corporate registration account number and the corporate branch account number in the NPS Account Set Up window.

Polish Legislation

The Polish legislation can use the following classifications:

- **PL SII Branch**: Use this classification to represent a local branch of the Social Insurance Institute (SII), a public organization that deals with the social insurance benefits, such as sickness allowance, maternity allowance, and rehabilitation benefits. You use the SII branch information for social insurance reporting.

- **PL Statistic Office**: Use this to represent a local statistic office. You use this information in reports sent to the statistic office.
- **PL Tax Office**: Use this to define the tax office bank accounts for the employer and for the tax collected from the employees. You use this information in statutory reports.

Norwegian Legislation

The Norwegian legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Payee Organization**: Use this classification to define an external organization which receives third party payment from an employee
- **Social Security Office**: Use this to define external social security office organizations.
- **Pension Provider**: Use this classification to define an external organization that provides pensions to your employees.
- **Statement Provider**: Use this classification to define an external organization that provides reports on behalf of the legal employer.
- **Tax Office**: Use this classification to define an external tax organization.

Finnish Legislation

The Finnish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **External Company**: Use this to record details of the various types of external organizations with whom your organization deals. Ensure to create organizations with this classification as external organizations.
- **Pension Provider**: Use this to record the basic information about pension insurance providers to which you transfer the appropriate pension insurance deductions.
- **Accident Insurance Provider**: Use this to identify organizations that provide accident insurance coverage, group life insurance, and unemployment insurance.
- **Finnish Magistrate Office**: Use this for identifying the authority responsible for processing the employee court orders.

- **Finnish Trade Union**: Use this to record the basic information about the employees' trade unions to process employee deductions.
- **Provincial Tax Office**: Use this to identify the legal employer's tax office.

Danish Legislation

The Danish legislation can use the following classifications:

- **Service Provider**: Use this classification to record details of the various types of external service providers with whom your organization deals.
- **Pension Provider**: Use this classification to define external pension providers.

Swedish Legislation

The Swedish legislation can use the following classifications:

- **Local Unit**: Use this classification to identify and report on the different work centers, within your enterprise, to which you assign employees.
- **Social Security Office**: Use this to define external social security office organizations with which you coordinate medical reimbursements for the employees.
- **Swedish Enforcement Office**: Use this to define external enforcement office organizations with which you coordinate the attachment of earnings deductions for the employees.

South African Legislation

The South African legislation can use the following classification:

- **Training Provider**: Use this to indicate if an organization is a training provider.

UAE Legislation

The UAE legislation can use the **Legal Employer** classification to define and enter additional organization information for your legal employer.

Irish Legislation

The Irish legislation can use the following classifications:

- **Legal Employer**: Use this classification to define and enter additional organization information for your legal employer.

- **Pension Provider**: Use this classification to define external pension provider.

Creating an Organization

Use the Organization window to create:

- Business groups
- External organizations (for example, tax offices, pension providers, insurance carriers, disability organizations, benefit carriers, or recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs/Legal Entities

If you use the Configuration Workbench to configure your enterprise structure, then you only need to create the additional internal and external organizations you require. For example, you can set up additional organizations to represent the internal divisions or departments, and external organizations for reporting or third party payments.

See: Extending the Enterprise Framework, *Oracle HRMS Enterprise and Workforce Management Guide*

To create an organization:

1. Navigate to the Organization window and click New to create a new organization.

   Note: For information about querying existing organizations, see: Finding an Organization, page 1-26

2. Enter a name for your organization in the Name field. A check is performed to see if organizations with the same name already exist.

   All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be unique within a business group, and business group names must be unique across your applications network.

   You can create two organizations with the same name in different business groups but this can cause confusion later, if the HR: Cross business group profile option is set to Yes and you decide to share certain information across all business groups. If you decide to create two organizations with the same name, be sure that this will not cause you problems in the future.

3. Optionally, select an organization type in the Type field.

   Organization types do not classify your organization, you use them for reporting purposes only. The type may identify the function an organization performs, such

as Administration or Service, or the level of each organization in your enterprise, such as Division, Department or Cost Center. You create the organization types you require by entering values for the Lookup Type ORG_TYPE.

4. Enter a start date in the From field. This should be early enough to include any historical information you need to enter.

   Note: You cannot assign an employee to an organization before the start date of the organization.

5. Enter a location, if one exists. You can also enter an internal address to add more details such as floor or office number.

   Dutch only: If you are setting up external organizations for a tax office, a social insurance provider or a private health insurance provider, you must enter the postal address and contact details using the NL_POSTAL_ADDRESS Location EIT.

   Mexico only: When defining a GRE/Legal Entity, if you select a location here, HRMS automatically associates it with this GRE in the Generic Hierarchy.

   US only: If you are using Oracle Payroll in the US, every organization to which employees can have assignments, including business groups, must have on record a location with a complete address. This is because the system uses the location of the organization of the employee's primary assignment to determine employee work locations for tax purposes. This does not apply to GREs, because the assignment to a GRE exists in addition to the assignment to an organization.

   India only: You can define an income tax organization and enter its location details. You can then select this organization at the GRE/Legal Entity Income Tax Office.

   Note: If you are an Oracle Inventory user, then you must not assign a location to more than one organization classified as an Inventory Organization.

6. Enter internal or external in the Internal or External field. You cannot assign people to an external organization.

   Examples of external organizations that may require entry are disability organizations, benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

Entering Organization Classifications

To determine the purpose and use of each organization you create, you give it one or

more classifications. The setup information you enter for an organization depends in large part on its classification.

See: Organization Classifications, page 1-8

> **Note:** If you classify an organization as a business group, it is not reversible.

To enter organization classifications:

1. Enter the classification for your organization in the Name field.
2. Enable the classification by checking the Enable box. This allows you to use and enter the essential additional information for your organization.
3. Save the classification details.
4. You can either enter additional information for the classification type or enter another classification.

> **Note:** Save each classification after entering and enabling it.

Entering Additional Information

For each classification you set up you can enter additional information. This information can be different for each classification.

For business group see: Business Group, page 1-21

For HR organization see: HR Organization, page 1-21

For representative body see: Representative Body, page 1-21

For constituency see: Constituency, page 1-21

For bargaining association see: Bargaining Association, page 1-21

For GRE / legal entity see: GRE / Legal Entity, page 1-21

For company cost center see: Company Cost Center, page 1-21

For professional body information see: Professional Body Information, page 1-21

See Organization Classifications, page 1-8 if you need to check which classification to select.

To enter business group additional information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Business Group Information, see: Entering Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Audit Expenditure Setup, see: Entering Audit Expenditure Setup Information, page 1-28

   - BG Termination Information, see: Entering BG Termination Information, page 1-28

   - Contribution Basis, see: Setting Up Contribution Area Base Rules, page 4-13

   - Income Tax Generic Rule, see: Business Groups: Entering the Income Tax Generic Rule, page 1-29

   - PHF and SI Rates, see: Setting Up Contribution Area Rates, page 4-12

   - Budget Value Defaults, see: Business Groups: Entering Budget Value Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Benefit Defaults, see: Benefit Defaults, see: Business Groups: Defining Benefit Defaults for a Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

   - PTO Balance Type, see: Business Groups: Selecting a PTO Balance Type, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Recruitment Information, see: Business Groups: Entering Recruitment Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Payslip Information, see: see: Entering Payslip Information, page 1-32

   - Self Service Preference Information, see: Entering Self-Service Preference Information, page 1-33

   - Enterprise Rounding Method Information, see: Business Group: Entering the Rounding Method for Enterprise Annuity, page 1-29

   - Severance Pay Tax Rule, see: Entering Severance Pay Tax Rule, page 1-37

   - Special Tax Pay Method, see: Business Group: Entering Special Tax Pay

Method, page 1-36

- Tax on ER EA Contribution, see: Entering Tax on Enterprise Annuity Employer Contribution, page 1-38
- Tax Under One Yuan, see: Entering Tax Under One Yuan Information, page 1-37

4. Repeat these steps to enter further information.

To enter HR organization additional information:

1. Click on the organization classification for which you want to enter additional information.
2. Choose the Others button to open the Additional Organization Information window.
3. Select one of the following:
   - Reporting Information, see: Entering Reporting Information for an HR Organization or a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*
   - Costing Information, see: HR Organizations: Entering Costing Information, *Oracle HRMS Enterprise and Workforce Management Guide*
   - Parent Organization, see: HR Organizations: Entering Parent Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*
   - Work Day Information, see: Business Groups and HR Organizations: Entering Work Day Defaults, *Oracle HRMS Enterprise and Workforce Management Guide*
   - Payslip Information, see Entering Payslip Information, page 1-32
   - Self Service Preference Information, see Entering Self-Service Preference Information, page 1-33
   - Related Organizations Information, see: Entering Related Organizations Information for an HR Organization, *Oracle HRMS Enterprise and Workforce Management Guide*
4. Repeat these steps to enter further information.

To enter representative body additional information:

1. Click on the organization classification for which you want to enter additional

information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Representative Body Information, see: Entering Representative Body Information, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Constituency information, see: Entering Constituency Information for a Representative Body, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter constituency additional information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Location, see: Entering Location Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Organization, see: Entering Organization Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Organization Hierarchy, see: Entering Organization Hierarchy Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Grade, see: Entering Grade Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Bargaining Unit, see: Entering Bargaining Unit Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Job, see: Entering Job Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Collective Agreement Grade, see: Entering Collective Agreement Grade Information for Constituencies, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter bargaining association information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select Trade Union Information, see: Entering Trade Union Information for a Bargaining Association, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter GRE / legal entity information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - Audit Balance Setup, see: Entering Audit Balance Setup Information, page 1-39

   - Audit Element Setup, see: Entering Audit Element Setup Information, page 1-39

   - Corporate Information, see: Entering Corporate Information for a GRE, page 1-41

   - Employer Information, see: Entering Employer Information for a GRE, page 1-40

   - GRE Termination Info, see: Entering GRE Termination Information, page 1-42

   - Tax on ER EA Contribution, see: Entering Tax on Enterprise Annuity Employer Contribution, page 1-43

4. Repeat these steps to enter further information.

To enter company cost center information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select one of the following:

   - GL Company Cost Center, see: Entering GL Company Cost Center Information for a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Reporting Information, see:Entering Reporting Information for an HR Organization or a Company Cost Center, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

To enter professional body information:

1. Click on the organization classification for which you want to enter additional information.

2. Choose the Others button to open the Additional Organization Information window.

3. Select Professional Body Info, see: Entering Additional Information for a Professional Body, *Oracle HRMS Enterprise and Workforce Management Guide*

4. Repeat these steps to enter further information.

Finding an Organization

Use the Find Organization window to find the organizations you want to review or amend. If you want to set up a new organization, rather than querying an existing organization, select the New button. For more information about creating a new organization, see Creating an Organization, page 1-19.

> **Note:** When you navigate to the Organization window, the Find Organization window automatically displays.

To query an organization using the Find Organization window:

1. Do one, a selection, or all of the following:

   - Enter a full or partial query on the organization's name. If more than one name matches the selection criteria, select one of the names.

- Enter a full or partial query on the organization type and/or location. If more than one organization type or location matches the selection criteria, select the type and/or location to query.

- Enter a full or partial query on the classification name. If more than one classification name matches the selection criteria, select the name to query.

  For the classification you have selected indicate whether you want to query on:

  - **Enabledclassifications**: This only returns those organizations that match your selection criteria and have your selected classification enabled.

  - **Disabled classification**: This only returns those organizations that match your selection criteria and have your selected classification disabled.

  - **Both:** This returns organizations that match your selection criteria and have your selected classification, regardless of whether the classification is enabled or disabled.

2. Choose the:

   - **Find** button to run the query.

     The organization or organizations found by the query display in the Organization window. If the query finds more than one organization, you can use the [Down Arrow] key or choose Next Record from the Go menu to display the next organization.

   - **Clear** buttonto remove the existing selection criteria. You can then enter new information on which to perform a query.

Removing and Deleting Organizations

Remove an organization if you want to prevent it being available for employee assignments. This still leaves a history of the organization. Only delete an organization if you want to completely remove it from your system.

To remove an organization:

1. Select the organization you want to remove.

2. Enter an end date (Date To) on the organization record.

To delete an organization:

1. Remove any employee assignments to the organization.

2. Remove the organization from any hierarchies.

3. Disable its organization classifications in the Organization window.

4. Delete the organization in the Organization window.

Entering Audit Expenditure Setup Information

Use the Audit Expenditure Setup window to select the cost allocation flexfield of your business group and specify the segment storing expenditure economy category code.

To enter Audit Expenditure Setup Information:

1. In the Organization window, query the business group. In the Organization Classifications region, select Business Group, click Others, and select Audit Expenditure Setup.

2. Click in a field of the Additional Organization Information window to open the Audit Expenditure Setup window.

3. Select the cost allocation flexfield defined for your business group.

4. Select the segment storing expenditure economy category code.

5. Save your work.

Entering BG Termination Information

Use the BG Termination information window to override the global monthly salary paid days and the leave compensation factor values to calculate Termination payments.

To enter BG Termination Information:

1. In the Organization window, query the business group. In the Organization Classifications region, select Business Group, click Others, and select BG Termination Information.

2. Click in a field of the Additional Organization Information window to open the BG Termination information window.

3. In the BG Termination Information window, enter the monthly salary paid days if you want to override the default values. If you leave this field blank, the application uses the default value set up as one of the global values.

4. Enter the leave compensation factor value, if you want to override the default values. If you leave this field blank, the application uses the default value set up as

one of the global values.

5. Enter the start and end dates.

6. Save your work.

Business Group: Selecting the Rounding Method for Enterprise Annuity

You select a rounding method for an enterprise annuity contribution for a business group for both employees and employers. You use this information for rounding the enterprise annuity contribution amounts during payroll processing.

You must use the Enterprise Rounding window to select the rounding method only if you have defined the contribution area rates using the user table. See: Setting Up Enterprise Annuity Deductions, page 4-9 and Setting up Values for the China Enterprise Annuity Contribution Rate User Table, page 4-10

To select the rounding method:

1. From the Organization window, query your corporate body.

2. In the Organization Classifications region, select Business Group.

3. Click Others to display the Additional Organization Information window, select Enterprise Rounding, and click OK.

4. Click in the Enterprise Rounding field to open the Enterprise Rounding window.

   The application automatically completes this field as Rounding Method For Enterprise Annuity. You may override this information by selecting another value.

5. Select the rounding methods for an enterprise annuity contribution for a business group for the employee and the employer.

6. Click OK.

Business Group: Entering the Income Tax Generic Rule

The Accumulative Withholding method is used as the default method for tax calculation. To use the Monthly Withholding method, you can select the calculation method for a tax area at the business group level.

To enter the Income Tax Generic Rule:

1. From the Organization window, query your corporate body.

2. In the Organization Classifications region, select the business group.

3. Click Others to display the Additional Organization Information window, select Income Tax Generic Rule, and click OK.

4. Click in the Income Tax Generic Rule field to open the Income Tax Generic Rule window.

5. Select the tax area.

6. Select the method to calculate the individual income tax. The default is Accumulative Withholding Method.

7. Enter the effective start and end dates.

8. Click OK.

9. Save your work.

Business Group: Entering Name in Chinese Character Set

Use this window to specify whether for non-expatriates, the name region on Person window is set up in Simplified Chinese character set or not.

If the profile option HR: Use Title in Person's Full Name is set to Yes, and you specify Yes in the Name in Chinese Charset window, for a non-expatriate, the application displays the person's name as last_namefirst_name title, and for an expatriate, the title is included between last name and first name. If the profile option is set to Yes, and you specify No in the Name in Chinese Charset window, for both expatriates and non-expatriates, the application displays the person's name as last name, title first name.

> **Note:** You may run the concurrent program Update Person Names (Full Name Format) to re-generate the full name for all the existing persons, after you complete the setup or make changes to the setup.

To enter name in Chinese Character Set:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose Others, and select Name in Chinese Charset.

2. Click in a field of the Additional Organization Information window to open the Name in Chinese Charset window.

3. Select Yes in the Name in Chinese Character Set field if for non-expatriates, you set up the name in Simplified Chinese in the name region of Person window.

4. Save your work.

Business Groups: Entering SOE Information

You enter statement of earnings (SOE) information at the business group level to specify what information appears on each region of the statement of earnings. You can enter element set names for earnings, deductions, and any imputed earnings to ensure that the elements within these sets appear on the statement of earnings. You can also supply balance attributes for SOE display.

To enter SOE information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE information

2. Click in a field of the Additional Organization Information window to open the SOE Information window.

3. Select the SOE user category. You use this information to restrict the type of users who can view the SOE.

4. Select the Earnings element set in the Elements 1 field. (The set name typically begins with a legislative identifier, and then incorporates SOE EARNINGS as the next part of the name).

5. Select the Deductions element set in the Elements 2 field. (The set name typically begins with a legislative identifier, and then incorporates SOE DEDUCTIONS as the next part of the name).

6. If you have an element set for imputed earnings, select it in the Elements 3 field.

   Note: For South Africa only: You select the ZA SOE Fringe Benefits and Other Non Payments element set in the Elements 3 field.

7. Select the Information element set in the Information 1 field. You create this element set when you set up your statement of earnings.

   See: Setting Up a Global Statement of Earnings, page 3-2

8. Select your predefined balance attributes in the Balances fields (Balance 1, Balance 2 and so on)

9. Save your work.

Business Groups: Entering SOE Detail Information

The statement of earnings (SOE) displays details of earnings, deductions and other payroll-related information for an employee assignment. Oracle HRMS enables you to determine the display name for elements and balances, and the sequence in which they display.

To enter SOE detail information:

1. In the Organization window, query the business group if it does not already appear. In the Organization Classifications region, select Business Group, click Others, and select SOE Detail Information.

2. Click in a field of the Additional Organization Information window to open the SOE Detail Information window.

3. Select the type of SOE details that you want to record, by selecting balance or element.
   - If you select balance, then select the balance, dimension, and balance display name that you want the SOE to display.
   - If you select element, then select the element name, input value, and element display name that you want the SOE to display

4. Save your work.

Entering Payslip Information

To enter payslip information:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select either Business Group or HR Organization, choose Others, and select Payslip Information.

2. Click in a field of the Additional Organization Information window to open the Payslip Information window.

3. Select the type of extra information to be displayed on the payslip. The choices are:
   - Balance
   - Element
   - Message

Your selection determines which other fields you must complete in this window.

To enter Balance extra information:

1. Select a balance name.
2. Select a dimension.
3. Optionally, enter a display name for the balance.
4. Optionally, enter a message text.
5. Save your work.

To enter Element extra information:

1. Select the element you want to display.
2. Select the input value for the element.
3. Optionally, enter a display name for the element.
4. Optionally, enter a message text.
5. Save your work.

To enter Message extra information:

1. Enter a display name for the message.
2. Enter a message text. This message will be displayed on the employees' online payslip.
3. Save your work.

Entering Self-Service Preference Information

You enter self-service preference information to define whether documents such as the online payslip is available in either or both online and paper version.

> **Note:** You can also enter this information at the Person or Location level.
>
> See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* and Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management*

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These information levels are arranged in a hierarchy. If you define self-service preferences at the person level, the settings will override any other settings made at the location, business group, or HR organization level. Similarly, if you define self-service preferences at the location level, the settings override any settings at the business group or HR organization level. Settings at the HR organization level will override settings at the business group level.

To enter Self-Service Preference information:

1. In the Organization window, query the Business Group or HR Organization if it does not already appear there.

2. In the Organization Classifications region, select Business Group or HR Organization, choose Others, and select Self Service Preference.

3. Click in a field of the Additional Organization Information window to open the Self Service Preference window.

4. Select the document type for which you want to define preferences.

   Australia users: Select payslip, payment summary, or payslip modeler.

   If Payslip Modeler functionality is available, you must select the document type as Payslip Modeler.

5. Select whether you want the document to be available online.

6. Select whether you want the document to be available on paper.

7. If you are providing payslips in PDF format:.Select the appropriate localization template. If you do not select the a payslip template, then the web web-based payslip is displayed

   Note: Australia, China, India, Hong Kong, Singapore, Korea, and New Zealand users should select the appropriate predefined localization template.

- You can append custom data to the generated XML. Specify the custom package and procedure in the XML Code field as : <custom package>.<custom procedure>.

- Specify the dates these changes are to take effect.

> **Note:** Template, XML Code and Effective Date fields in Self-Service Preference can be configured at the Business Group, HR Organization, and Location levels.

The application generates either an Oracle Applications Framework (OAF)-based payslip or PDF payslip depending on the values entered in the Template and Effective Date fields. A PDF Payslip is generated when you select the template and enter the effective date on or before the payroll payment date.

For example, consider the effective date of PDF payslip as 01-Jun-2016:

If the payment date is prior to the effective date (31-May-2016), then the application generates an OAF payslip.

If the payment date is later than the effective date (30-Jun-2016), then the application generates a PDF payslip.

8. If payslip modelling is enabled for your localization, then select the template that you want to use for payslip modeling process to use, if you do not want the application to use the default template.

9. Select the element set for elements that you want to exclude from selection when you run a payslip modeling process.

10. **Payslip Employer Address** – Select either a GRE/Legal Entity Address or an HR Organization Address (default) to display on the payslip.

    > **Note:** You can configure this segment only at the Business Group level.

    For Canada only – Both the OAF and PDF payslips display the HR Organization as the Employer Address.

11. **Display Payslip GRE Addr From** – If you selected GRE/Legal Entity Address for the Payslip Employer Address field, select the effective date after which the GRE address displays on the payslip.

    > **Note:** You can configure this segment only at Business Group level.

    For Canada: – This field is not applicable.

12. **Specify the Offset Criteria** – Select either Payslip View Date or Date Paid to configure the date to be used for displaying Online Payslips. If this field is left blank or if the Payslip View Date is selected then the online payslip will be displayed based on the Payslip View Date that is defined for the payroll period. If Date Paid is selected, then the payslip will be displayed based on the Date Paid of the payroll

run.

> **Note:** By default, Payslip View Date – Check Date for any period will be equal to the Payslip offset defined for the payroll. However, if the user manually changes these dates for any period, then the Payslip Offset for that period will be considered as the Payslip View Date – Check Date and not the Offset defined for the Payroll.
>
> If the Payslip View Date or the Payslip Offset is set to null, then all payslips (prior, current and future) will be available to the employee. By default, the Payslip Offset is set to zero when creating the Payroll definition.

13. Select whether you want to display the rate details section.

14. Save your work.

Business Groups: Entering Special Pay Tax Method

Use the Special Pay Tax Method window to record a taxation method for special payments for each tax area used by your enterprise. You require this information to process and tax any Special Payments.

To enter the Special Pay Tax Method details:

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select Business Group, choose Others, and select Special Pay Tax Method.

2. Click the field on the Additional Organization Information to open the Special Pay Tax Method window.

3. Select the tax area to determine the taxation regulations.

4. Select the special payment type you want to process, such as Thirteenth Month, Festival.

5. Select the taxation method to process the special payments for the Tax Area selected previously:
   - Tax Normal - to tax along with the regular earnings
   - Tax Separate - to tax as one month salary independently of any other earnings
   - Tax Spread - to tax the earnings over a number of periods

6. Enter the effective start and end dates.

7. Save your work.

Related Topics

Setting Up Special Payments Taxation Element, page 4-7

Entering Severance Pay Tax Rule

You can specify the rule in calculating year of service for severance pay tax for each every tax area set up within the Severance Pay Tax Rule window.

To enter severance pay tax rule:

1. In the Organization window, query the organization if it does not already appear there.

2. In the Organization Classifications region, select Business Group, click Others, and select Severance Pay Tax Rule.

3. Click the field on the Additional Organization Information to open the Severance Pay Tax Rule window.

4. Select the tax area to determine the taxation regulations.

5. Select the proper Year of Service calculation rule in the YOS Calculation rule.

6. Enter the effective start and end dates.

7. Save your work.

Business Group: Entering Tax Under One Yuan Information

Use the Tax Under One Yuan information window to record the exemption settings for tax under one Yuan policy. You can determine for a particular tax area if employees are exempted from tax if the tax payable is less or equal to one Yuan.

> **Note:** If no rule is set up for a tax area at business group level, by default there is no exemption if tax payable is less than one Yuan.

To enter Tax Under One Yuan Information:

1. In the Organization window, query the business group. In the Organization

Classifications region, select Business Group, click Others, and select Tax Under One Yuan.

2. Click in a field of the Additional Organization Information window to open the Tax Under One Yuan information window.

3. In the Tax Under One Yuan window, select the tax area for which you want to specify the exemption settings.

4. Select an appropriate tax payment exemption policy depending on the amount of tax calculated to be paid.

5. Enter the effective start and end dates. It is optional to enter Effective End Date. If you do not specify the Effective End Date, at the backend, the Date is set to the last available date in database.

6. Save your work.

Business Group: Entering Tax on Enterprise Annuity Employer Contribution

Use the Tax on EA ER Cont window to specify if you want to calculate the tax on Enterprise Annuity employer contribution for a tax area.

To specify for a tax area, calculate and deduct tax on Enterprise Annuity Employer Contribution:

1. In the Organization window, query the business group. In the Organization Classifications region, select Business Group, click Others, and select Tax on EA ER Cont.

2. Click in the Tax on EA ER Cont field to open the Tax on EA ER Contribution window.

3. Select the tax area.

   If you do not select any tax area, then the application does not calculate any tax on the employer contribution. You can choose to override this value at the GRE/Legal Entity level.

4. Select whether you want to calculate the tax on employer contribution for Enterprise Annuity.

5. Enter an effective start date and end date.

6. Click OK.

Entering Audit Balance Setup Information for Legal Entity

Use the Audit Balance Setup window to set up the balances to export for a legal entity as part of the payroll output for China Data Interface of Accounting Software standard.

To enter audit balance setup information:

1. From the Organization window, query your legal entity if it is not displayed already.
2. Ensure that GRE/Legal Entity is selected and enabled in the Organization Classifications region.
3. Click the Others to display the Additional Organization Information window, select Audit Balance Setup, and click OK.
4. Click in the Audit Balance Setup field to open the Audit Balance Setup window.
5. Select your payroll.
6. Specify the balances to export under the payroll.
7. Select the effective start and end dates for the balance.
8. Save your work.

Entering Audit Element Setup Information for Legal Entity

Use the Audit Element Setup window to set up the elements to export for a legal entity as part of the payroll output for China Data Interface of Accounting Software standard.

To enter audit element setup information:

1. From the Organization window, query your legal entity if it is not displayed already.
2. Ensure that GRE/Legal Entity is selected and enabled in the Organization Classifications region.
3. Click the Others to display the Additional Organization Information window, select Audit Element Setup, and click OK.
4. Click in the Audit Element Setup field to open the Audit Element Setup window.
5. Select your payroll.

6. Specify the element to export under the payroll.

7. Select the effective start and end dates for the element.

8. Save your work.

Entering Employer Information for a GRE

You enter employer information, such as the names of registration authorities for statutory insurance, for your enterprise's divisions. You must have this information for preparation of statutory reports to submit to the People's Republic of China government. These reports pertain to income tax and statutory benefits such as the Public Housing Fund (PHF).

A Government Reporting Entity (GRE) with employer information may be regarded as an employer. For example, your enterprise's divisions in Shanghai and Beijing are region-specific employers that report to your enterprise's head office.

> **Important:** At least one organization in your organization hierarchy must have employer information. Only organizations with employer information are displayed in the Employer field of the CN Statutory Info window.

Use the Employer Information window to enter employer information for your enterprise's division.

To enter employer information for a GRE:

1. From the Organization window, query your employer they are not displayed already.

2. Ensure that GRE / Legal Entity is selected and enabled in the Organization Classifications region.

3. Choose the Others button to display the Additional Organization Information window, select Employer Information, and choose the OK button.

4. Click in the Employer Information field to open the Employer Information window.

5. Enter your employer's tax-registration number, business license number, medical insurance registration authority and number, pension insurance registration authority and number, if required. The business-license number is typically the key identifier of your employer.

6. Select the corporate body to which your employer is linked.

Note: The Corporate Organization field displays only those organizations (corporate bodies) in your business group that are set up as GREs with the Corporate Information organization information type completed. An employer must be associated with a corporate body because the former contains area-specific details while the latter has other details that are not area-specific. Both kinds of information are required for preparation of statutory reports, such as those on income tax and statutory benefits.

See: Entering Corporate Information for a GRE (China), page 1-41

7. Select Yes to defer the deductions until the workers' probation period ends, otherwise select No.

8. Select Yes if the employer commences deductions in the current payroll period once the probation period expires, otherwise select No to deduct in the next payroll period.

9. Enter the injury insurance registration authority and number, maternity insurance registration authority and number, and unemployment insurance registration authority and number, if required. If you leave the fields blank, this information is not displayed in reports like China PHF/SI Contribution Amount Monthly Report, and China PHF/SI Contribution Base Yearly Report.

10. Enter the Enterprise Annuity registration number and authority, if the employer has selected a third party or set up a trustee to manage the Enterprise Annuity fund.

11. Save your work.

Entering Corporate Information for a GRE

You enter corporate information, such as the name and enterprise organization code, for your enterprise. You must have this information for preparation of statutory reports to submit to the Chinese government. These reports pertain to income tax and statutory benefits such as the Public Housing Fund (PHF).

A Government Reporting Entity (GRE) with corporate information may be regarded as a corporate body. For example, the head office of your enterprise is a corporate body to which region-specific employers (your enterprise's divisions) report.

Important: At least one organization in your organization hierarchy must have corporate information. If your organization hierarchy does not contain an organization with corporate information, you cannot

define an organization with employer information using the Employer Information window.

See: Entering Employer Information for a GRE, page 1-40

Use the Corporate Information window to enter corporate information for your enterprise.

To enter corporate information for a GRE:

1. From the Organization window, query your corporate body if it is not already displayed.
2. Ensure that GRE / Legal Entity is selected in the Organization Classifications region.
3. Click Others to display the Additional Organization Information window, select Corporate Information, and click OK.
4. Click in the Corporate Information field to open the Corporate Information window.
5. Enter the name that appears on your enterprise's business license and the URL of your enterprise's Web site.
6. Enter the code issued to your enterprise by the National Standard Bureau of China. The code format is xxxxxxxx-x, where x is a letter or number.
7. Select the category for your enterprise.
8. Enter the business category for your enterprise. This field describes the ownership of your enterprise. For example, your enterprise could be a government-owned unit, joint venture, or subsidiary of a foreign enterprise.
9. Enter the names of the industry that your enterprise is in and the supervisory body. Select the subordination relationship and unit level.
10. Enter the name and National Identity Card number of the individual who represents your enterprise.
11. Select the Data Interface of Accounting Software Standard to apply for this legal entity depending on whether it is an enterprise or a non-profit government agency.
12. Save your work.

Entering GRE Termination Information

Use the GRE Termination information window to override the monthly salary paid

days and the leave compensation factor values set at business group level to calculate Termination payments.

To enter GRE Termination Information:

1. In the Organization window, query the business group. In the Organization Classifications region, select GRE/Legal Entity, click Others, and select GRE Termination Information.

2. Click in a field of the Additional Organization Information window to open the GRE Termination Information window.

3. In the GRE Termination Information window, enter the monthly salary paid days value if you want to override the values set up at BG Termination Information level or global values level. If you leave this field blank, the application uses the value set up at BG Termination Information level or global values level.

4. Enter the leave compensation factor value, if you want to override the values set up at BG Termination Information level or global values level. If you leave this field blank, the application uses the value set up at BG Termination Information level or global values level.

5. Enter the start and end dates.

6. Save your work.

GRE/Legal Entity: Entering Tax on Enterprise Annuity Employer Contribution

Use the Tax on EA ER Cont window at the GRE/Legal Entity level to set up values to override the setup at business group level.

To enter Tax on Enterprise Annuity Employer Contribution :

1. In the Organization Classifications region, select GRE/Legal Entity, click Others, and select Tax on EA ER Cont.

2. In the Tax on EA ER Cont window, enter the tax area if you want to override the values set up at business group level. If you leave this field blank, the application uses the value set up at business group to calculate the tax on employer contribution for enterprise annuity.

3. Select Yes if you want to calculate the tax on employer contribution, or No if you do not want to calculate the tax on employer contribution.

4. Enter an effective start date and end date to calculate the taxes.

5. Save your work.

2

Compensation and Benefits Management

Elements

Survey of the Classifications

The survey of classifications identifies:

- The function of elements within each primary classification, page 2-2
- The processing priority range, default priority, and cost type for each classification, page 2-5
- A list of the predefined secondary classifications within each primary classification, page 2-6

Primary Classifications

Classification	Meaning
Balance Initialization	Balance Initialization elements are used specifically for the loading of initial values into balances. You would mainly use these elements when transferring data from another payroll system.
Information	Information elements store information that is not directly used by payroll processing. The information may be used by other elements or by Fast Formulas.
Direct Payments	Direct Payment elements are for expenses or loans made through the payroll and are not subject to tax. They are not included in gross or net pay balances.
Non Taxable Earnings	Use the non-taxable earnings classification for elements that represent non-taxable payments such as reimbursements.
Employer Liabilities	Use the Employer Liabilities classifications for elements, which result in the employer being liable for payment. Examples are the employer component of Public Housing Fund and Social Insurances.

Classification	Meaning
Special Payments	Use the classification for elements that represent certain special payments payable to employees as per requirements of China legislation. These are taxable payments and are categorized into • Festival Gratuity payments • 13th month salary • Bonuses • Sales commissions
Retro Special Payments	Use the Retro Special Payments classification for elements that represent certain retrospective special payments payable to employees as per the requirements of China legislation.
Special Additional Deductions	Use this classification for elements for any additional deduction from the taxable Income. These elements are displayed in the statement of earnings and in the pay slips.
Taxable Earnings	Use the Taxable Earnings classification for all elements that represent payments subject to taxation.
Retro Taxable Earnings	Use the Retro Taxable Earnings classification for all elements that represent retrospective payments subject to taxation.
Variable Yearly Earnings	Use the Variable Yearly Earnings classification for all elements that represent payments made to yearly-rated employees.
Retro Variable Yearly Earnings	Use the Retro Variable Yearly Earnings classification for all elements that represent retrospective payments made to yearly-rated employees.

Classification	Meaning
Severance Payments	Use the Severance Payments classification for elements paid as a part of severance to the employee. These elements are taxable, but not as regular taxable earnings.
Voluntary Deductions	Voluntary Deductions elements are for deductions, such as union dues, that the employee authorizes the employer to make voluntarily on his or her behalf after tax.
Statutory Deductions	Statutory Deductions elements are for deductions from an employee's salary, such as public housing funds, social insurances, and tax on salary that are legislative.
Retro Statutory Deductions	Retro Statutory Deductions are for deductions from an employee's salary such as Retro Supplementary Medical Deduction, Retro Injury Insurance Deduction and Retro Pension Deduction.
Annual Bonus	Use the Annual Bonus classification to calculate the annual or year-end bonus paid to employees.
Retro Annual Bonus	Use the Retro Annual Bonus classification for elements that represent retrospective bonus payments to employees, in the When-Earned Case.
Pre Tax Non Statutory Deduction	Use Pre Tax Non Statutory Deduction for calculation of the Pre Tax non-statutory deductions.
Retro Pre Tax Non Statutory Deduction	Use Retro Pre Tax Non Statutory Deduction for calculation of any Pre Tax non-statutory deductions retrospectively.
EA ER Contribution Information	Use EA ER Contribution Information for calculation of tax on Enterprise Annuity employer contribution.

Classification	Meaning
Taxable Benefits	Use Taxable Benefits for calculation of some benefits paid outside payroll and not included in gross pay and net pay calculation.

Primary Classification Processing Priorities and Cost Types

The following table shows processing priority and costing details for the primary classifications supplied.

Primary Classification	Priority Range	Default Priority	Cost Type
Balance Initialization	0-0	0	Credit
Information	1-500	250	Debit
Direct Payments	501-1000	750	Debit
Non Taxable Earnings	1001-1500	1250	Debit
Employer Liabilities	1501-2000	1750	Credit
Special Payments	2001-3000	2500	Debit
Retro Special Payments	7001-7500	7250	Debit
Taxable Earnings	3001-3500	3250	Debit
Retro Taxable Earnings	7001-7500	7250	Debit
Variable Yearly Earnings	2001-3000	2500	Credit
Retro Variable Yearly Earnings	7001-7500	7250	Credit
Severance Payments	3501-4000	3750	Debit

Primary Classification	Priority Range	Default Priority	Cost Type
Voluntary Deductions	4001-5000	4500	Credit
Statutory Deductions	5001-6000	5500	Credit
Retro Statutory Deductions	7501-8000	7750	Credit
Special Additional Deductions	5000-6000	5100	Credit
Annual Bonus	2001-3000	2500	Debit
Retro Annual Bonus	3001-3500	3250	Debit
Pre Tax Non Statutory Deduction	3250- 3750	3500	Credit
Retro Pre Tax Non Statutory Deductions	3250- 3750	3500	Credit
EA ER Contribution Information	6150-6150	6150	Credit
Taxable Benefits	3001-4000	3250	Debit

Predefined Secondary Element Classifications

This table shows the predefined secondary classifications supplied. You cannot update or delete these predefined classifications.

An element is automatically given any default secondary classifications defined for its primary classification.

Primary Classification	Secondary Classifications	Default
Annual Bonus	Severance Pay Constituents for Annual Bonus	No

Primary Classification	Secondary Classifications	Default
	PHF SI Constituents for Annual Bonus	No
	Notice Pay Constituents for Annual Bonus	No
	Leave Pay Constituents for Annual Bonus	No
Balance Initialization	(None)	N/A
Information	(None)	N/A
Direct Payments	(None)	N/A
Non Taxable Earnings	Severance Pay Constituents for Non Taxable Earnings	No
	PHF SI Constituents for Non Taxable Earnings	No
	Notice Pay Constituents for Non Taxable Earnings	No
	Leave Pay Constituents for Non Taxable Earnings	No
Employer Liabilities	(None)	N/A
Special Payments	Festival	No
	Thirteenth_Month	No
	Variable	No
	Sales	No
	PHF SI Constituents for Special Payments	

Primary Classification	Secondary Classifications	Default
	Severance Pay Constituents for Special Payments	
	Notice Pay Constituents for Special Payments	
	Leave Pay Constituents for Special Payments	
Retro Special Payments	(None)	N/A
Taxable Earnings	Severance Pay Constituents	No
	Termination Payments	No
	Leave Pay Constituents	No
	Notice Pay Constituents	No
	PHF SI Constituents	No
Retro Taxable Earnings	(None)	N/A
Variable Yearly Earnings	(None)	N/A
	PHF SI Constituents for Variable Earnings	No
	Severance Pay Constituents for Variable Earnings	No
	Notice Pay Constituents for Variable Earnings	No
	Leave Pay Constituents for Variable Earnings	No
Retro Variable Yearly Earnings	(None)	N/A
Severance Payments	(None)	N/A

Primary Classification	Secondary Classifications	Default
Voluntary Deductions	Voluntary Deduction	No
	Donations	No
Statutory Deductions	(None)	N/A
Retro Statutory Deductions	(None)	N/A
Pre Tax Non Statutory Deductions	Leave Pay Deduction Constituents	N/A
	Notice Pay Deduction Constituents	N/A
	PHF SI Deduction Constituents	N/A
	Severance Pay Deduction Constituents	N/A
	Termination Pay Deduction Constituents	N/A
Retro Pre Tax Non Statutory Deductions	None	N/A
EA ER Contribution Information	None	N/A

Predefined Elements

The following table lists the predefined elements used in Oracle HRMS for China:

Predefined Elements

Element Name	Description
Apply Annual Exemption	Created for eligible employees who opt for annual exemption

Element Name	Description
Tax Exemption from Year Start	Created for a new employee only who is paid for first time in the year
Enterprise Annuity Information	Created for the information related to Enterprise Annuity in China
Enterprise Annuity Deduction	Created for deduction for Enterprise Annuity in China
Enterprise Annuity ER Contribution	Created for the employer contribution for Enterprise Annuity in China
Retro Enterprise Annuity Deduction	Created for retrospective change to enterprise annuity deduction as processed in the retro period
Retro Enterprise Annuity ER Contribution	Created for retrospective change for enterprise annuity as processed in the retro period
Tax Report Information	Created for Tax Report Information
Taxation Information	Created for the Taxation Information
Special Payments Separate	Created for the Special Payments Separate
Special Payments Spread	Created for the Special Payments Spread
Current Year Variable Earnings	Created to hold the Current Year Variable Earnings
Previous Year Variable Earnings	Created to hold the Previous Year Variable Earnings
Injury Insurance ER Contribution	Created to hold the employer contribution towards Injury Insurance
Maternity Insurance ER Contribution	Created to hold the employer contribution towards Maternity Insurance
Medical ER Contribution	Created to hold the employer contribution towards Medical Insurance

Element Name	Description
PHF ER Contribution	Created to hold the employer contribution towards Public Housing Fund
Pension ER Contribution	Created to hold the employer contribution towards Pension
Supplementary Medical ER Contribution	Created to hold the employer contribution towards Supplementary Medical Insurance
Unemployment Insurance ER Contribution	Created to hold the employer contribution towards Unemployment Insurance
Retro Medical ER Contribution	Created to hold the Retro Medical Employer Contribution
Retro Unemployment Insurance ER Contribution	Created to hold the Retro Unemployment Insurance Employer Contribution
Retro Injury Insurance ER Contribution	Created to hold the Retro Injury Insurance Employer Contribution
Retro Maternity Insurance ER Contribution	Created to hold the Retro Maternity Insurance Employer Contribution
Retro PHF ER Contribution	Created to hold the Retro Public Housing Fund Employer Contribution
Retro Pension ER Contribution	Created to hold the Retro Pension Employer Contribution
Retro Supplementary Medical ER Contribution	Created to hold the Retro Supplementary Medical Employer Contribution
Special Payments Normal	Created to hold the Special Payments Normal
Leave Compensation	Created to hold the Leave Compensation
Pay in lieu of Short Notice	Created to hold the Pay in lieu of Short Notice
Retro Special Payments Normal WP	Created to hold the Retro Special Payments Normal When Paid

Element Name	Description
Severance Payments	Created to hold the Severance Payments
PHF Deduction	Created to hold the Public Housing Fund Deduction
Pension Deduction	Created to hold the Pension Deduction
Medical Deduction	Created to hold the Medical Deduction
Supplementary Medical Deduction	Created to hold the Supplementary Medical Deduction
Unemployment Insurance Deduction	Created to hold the Unemployment Insurance Deduction
Injury Insurance Deduction	Created to hold the Injury Insurance Deduction
Maternity Insurance Deduction	Created to hold the Maternity Insurance Deduction
Taxation Deduction	Created to hold the Taxation Deduction
Separate Taxation Deduction	Created to hold the Separate Taxation Deduction
Severance Taxation Deduction	Created to hold the Severance Taxation Deduction
Tax Variable Deduction	Created to hold the Tax Variable Deduction
Tax Report Information YTD	Created to hold the YTD values for calculating income tax
Retro Tax Variable Deduction	Created to hold the Retro Tax Variable Deduction
Retro Supplementary Medical Deduction	Created to hold the Retro Supplementary Medical Deduction

Element Name	Description
Retro Injury Insurance Deduction	Created to hold the Retro Injury Insurance Deduction
Retro Unemployment Insurance Deduction	Created to hold the Retro Unemployment Insurance Deduction
Retro Maternity Insurance Deduction	Created to hold the Retro Maternity Insurance Deduction
Retro Pension Deduction	Created to hold the Retro Pension Deduction
Retro Medical Deduction	Created to hold the Retro Medical Deduction
Retro PHF Deduction	Created to hold the Retro PHF Deduction
Retro Taxation Deduction	Created to hold the Retro Taxation Deduction
Retro Separate Taxation Deduction	Created to hold the Retro Separate Taxation Deduction
Retro Special Payments Normal WE	Created to hold the Retro Special Payments Normal When Earned
Retro Special Payments Separate WE	Created to hold the Retro Special Payments Separate When Earned
Retro Special Payments Spread WE	Created to hold the Retro Special Payments Spread When Earned
Retro Special Payments Separate WP	Created to hold the Retro Special Payments Separate When Paid
Retro Special Payments Spread WP	Created to hold the Retro Special Payments Spread When Paid
PHF Information	Created to hold the Public Housing Fund Information
Pension Information	Created to hold the Pension Information
Medical Information	Created to hold the Medical Information

Element Name	Description
Supplementary Medical Information	Created to hold the Supplementary Medical Information
Unemployment Insurance Information	Created to hold the Unemployment Insurance Information
Injury Insurance Information	Created to hold the Injury Insurance Information
Maternity Insurance Information	Created to hold the Maternity Insurance Information
Retro Current Year Variable Earnings WP	Created to hold the Retro Current Year Variable Earnings When Paid
Retro Previous Year Variable Earnings WP	Created to hold the Retro Previous Year Variable Earnings When Paid
Retro Current Year Variable Earnings WE	Created to hold the Retro Current Year Variable Earnings When Earned
Retro Previous Year Variable Earnings WE	Created to hold the Retro Previous Year Variable Earnings When Earned
Tax on EA ER Contribution	Created to hold the Tax amount on Enterprise Annuity employer contribution
EA ER Contribution to Personal Account	Created to hold the Net Enterprise Annuity employer contribution to be credited to the employee's personal account
Retro Enterprise Annuity Deduction WP	Created to hold the Retro Enterprise Annuity Deduction Tax When Paid
Retro Enterprise Annuity ER Contribution WP	Created to hold the Retro Enterprise Annuity ER Contribution Tax When Paid
Retro Injury Insurance Deduction WP	Created to hold the Retro Injury Insurance Deduction Tax When Paid
Retro Injury Insurance ER Contribution WP	Created to hold the Retro Injury Insurance Employer Contribution Tax When Paid

Element Name	Description
Retro Maternity Insurance Deduction WP	Created to hold the Retro Maternity Insurance Deduction Tax When Paid
Retro Maternity Insurance ER Contribution WP	Created to hold the Retro Maternity Insurance Employer Contribution Tax When Paid
Retro PHF Deduction WP	Created to hold the Retro PHF Deduction Tax When Paid
Retro PHF ER Contribution WP	Created to hold the Retro PHF Employer Contribution Tax When Paid
Retro Pension Deduction WP	Created to hold the Retro Pension Deduction Tax When Paid
Retro Pension ER Contribution WP	Created to hold the Retro Pension Employer Contribution Tax When Paid
Retro Supplementary Medical Deduction WP	Created to hold the Retro Supplementary Medical Deduction Tax When Paid
Retro Supplementary Medical ER Contribution WP	Created to hold the Retro Supplementary Medical Employer Contribution Tax When Paid
Retro Unemployment Insurance Deduction WP	Created to hold the Retro Unemployment Insurance Deduction Tax When Paid
Retro Unemployment Insurance ER Contribution WP	Created to hold the Retro Unemployment Insurance Employer Contribution Tax When Paid
Retro Taxable Medical Contribution WP	Created to hold the Retro Taxable Medical Contribution Tax When Paid
Retro Taxable PHF Contribution WP	Created to hold the Retro Taxable PHF Contribution Tax When Paid
Retro Taxable Pension Contribution WP	Created to hold the Retro Taxable Pension Contribution Tax When Paid

Element Name	Description
Retro Taxable Unemployment Contribution WP	Created to hold the Retro Taxable Unemployment Contribution Tax When Paid
Retro SPHF Deduction	Created to hold the Retro SPHF Deduction
Retro SPHF Deduction WP	Created to hold the Retro SPHF Deduction When Paid
Retro SPHF ER Contribution	Created to hold the Retro SPHF Employer Contribution
Retro SPHF ER Contribution WP	Created to hold the Retro SPHF Employer Contribution When Paid
Retro Taxable SPHF Contribution	Created to hold the Retro Taxable SPHF Contribution
Retro Taxable SPHF Contribution WP	Created to hold the Retro Taxable SPHF Contribution When Paid
SPHF Deduction	Created to hold the SPHF Deduction
SPHF ER Contribution	Created to hold the SPHF Employer Contribution
SPHF Information	Created to hold the SPHF Information
Taxable SPHF Contribution	Created to hold the Taxable SPHF Contribution

Balances

Payroll Balances

Balances show the positive or negative accumulation of particular values over periods of time. They are fed either by the direct run results (that is, Pay Values) of elements processed in the payroll run, or by input values. For example, in North American installations, the input value Hours of the element Time Entry Wages feeds the balance Regular Hours Worked.

Balance Dimensions and Levels

Balances exist for various time *dimensions*, such as current run, period to date, month, quarter to date, and year to date.

Balances also exist at different *levels*, such as assignment level or person level. Balances for individual employee assignments are at the assignment level (in North America, they can be at the assignment level within a GRE). If your enterprise permits employees to hold more than one assignment at the same time, you can hold balances at the person level. For example, a person level Gross Earnings balance is the sum of an employee's assignment level Gross Earnings balances.

Choosing Elements To Feed a Balance

You can select elements to feed a balance in three ways:

- Select a primary classification. The run results of all elements in the classification feed the balance. However, you must have an input value of Pay Value if you want to create a feed between an element and a balance.

- Select a secondary classification. You choose which elements from a primary classification (such as Earnings) are to feed the balance by giving these elements a secondary classification. Again it is the run results of the elements that feed the balance.

  Note: Secondary classifications are not used in the North American versions of Oracle Payroll at this time.

- Select an individual element. You can select either the run result or an input value to feed the balance. The input value must have the same unit of measure (such as hours or number) as the balance.

You can choose any number of classifications or any number of elements to feed a balance. However you cannot use a mixture of classifications and individual elements

to feed a balance. When you select an element or classification as a balance feed, you specify whether the run results (or input values) should add to or subtract from the balance.

Startup and User Defined Balances

The balances and balance feeds for the elements supplied with Oracle Payroll are present in the system when you receive it. For North American users, when you initiate earnings types, deductions and other items that process in the payroll run, the system generates the appropriate balances and balance feeds together with the necessary elements.

You can define any additional balances your enterprise requires. For example, you may require a Pensionable Earnings balance for a pension plan your enterprise offers employees.

Primary Balances

> **Important:** You cannot have two or more elements with the same primary balance. This setup will cause incorrect elements to show up on reports or Statement of Earnings when the process uses balance reporting architecture.

You define primary balance using the following navigation:

- Balance window (Total Compensation > Basic > Balance):

  You define primary balance by selecting an element and an input value in the Primary Balance region in the **Balance** window. This type of balance is fed by a single element and can only be inserted if no balance feeds exist for the balance, with the exception of Balance Initialization feeds. When you create a primary balance, the associated feed is created automatically. No other feeds can be created for the balance. Note that if the Primary Balance region is disabled, then the primary balance functionality is not enabled for that localization.

- Earnings or Deductions window:

  When you create a balance, the balance gets created with name same as that of the element and the element input "Pay Value" gets added as a feed to this balance. This balance is considered as a Primary Balance for this element and can be seen from the Primary Balance field in the **Element Description**, Further Information window. Changing this Primary Balance in the Further Element Information will result in incorrect values to be reported. For example, Statement of Earnings (SOE) is designed to display the values based on the Primary Balance associated with the elements that are processed.

Payroll Balance Dimensions

The following dimensions are predefined. You can create additional dimensions at the assignment level, if you require them.

These statutory dimensions are normally used for summing balance feeds for single assignments to predefined balances.

You can view assignment-level balances within a Legal Employer (indicated by ER in the balance dimension name), and assignment-level balances within the Jurisdiction (indicated by JUR in the balance dimension name).

_ASG_RUN	during one payroll run
_ASG_MTD	since the start of this month
_ASG_PTD	since the start of this payroll processing period
_ASG_QTD	since the start of tax year, reset every three months
_ASG_YTD	since the start of the payroll processing year
_ASG_PYEAR	for the previous calendar year, i.e. January to December
_ASG_LTD	since the start of the assignment to date
_ASG_FY_QTD	since the start of the fiscal year, reset each fiscal quarter
_ASG_FY_YTD	since the start of the fiscal year, reset each fiscal year
_ASG_PMTH	for the previous month
_ASG_P12MTH	for the previous month and the next twelve months thereafter
_ASG_ER_MTD	since the start of this calendar month
_ASG_ER_PTD	since the start of this payroll processing period

_ASG_ER_QTD	since the start of the tax year, reset every three months
_ASG_ER_RUN	for this payroll run
_ASG_ER_YTD	since the start of the payroll processing year
_ASG_ER_LTD	since the start of the assignment to date
_ASG_ER_FY_QTD	since the start of the fiscal year, reset each fiscal quarter
_ASG_ER_FY_YTD	since the start of the fiscal year, reset each fiscal year
_ASG_ER_JUR_RUN	for this payroll run
_ASG_ER_JUR_PTD	since the start of this payroll processing period
_ASG_ER_JUR_MTD	since the start of this month
_ASG_ER_JUR_QTD	since the start of tax year, reset every three months
_ASG_ER_JUR_YTD	since the start of the payroll processing year
_ASG_ER_JUR_LTD	since the start of the assignment to date

Payments Dimension

This is a special dimension, which aggregates results from payroll runs that have been picked up in a particular pre-payments run.

_PAYMENTS	for a set of payroll runs

3

Payment Distribution

Payroll Payment and Distributions Overview

Using Oracle HRMS you can define payment methods for your enterprise and define any rules for validating or processing the distribution of pay.

Payroll Payment and Distributions in Oracle HRMS

You provide for payment and distribution by defining payment methods for your enterprise and then specifying which of these organizational payment methods are valid for the payrolls that you create. This enables you to set up a flexible pattern of payment in which you can pay individual employees by a single payment method, or by a combination of valid payment methods.

Key Concepts

To enable you to set up payment and distributions correctly, you need to understand these key concepts:

- Payment methods for your enterprise, *Oracle HRMS Payroll Processing Management Guide*
- Cash Management and Oracle Payroll, *Oracle HRMS Payroll Processing Management Guide*

Reporting on Payroll Payment and Distributions

See: Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Setting Up a Global Statement of Earnings

Oracle HRMS enables you to view the online statement of earnings (SOE). To enable the correct display of values on your statement of earnings, you must complete each of these setup steps.

To set up the global statement of earnings:

1. Create a user category through the lookup SOE_USER_CATEGORY.

   See: Creating User Types and Statuses, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the value of the user category that you created as the profile value for the profile PAY: Statement of Earnings User Category.

   See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Add the predefined element sets for your earnings and deductions to the SOE Information EIT at the business group level.

   For Canadian and US users only: SOE Information functionality is not available for Canadian and US legislations.

   Swedish users only: Ensure that you have enabled your elements to display a code. You do this at the business group level by entering Extra Element Details for each element. When you select the EIT, you can make a further selection of Element Name, and specify a code for your selected element. This ensures that your SOE displays the element code in the earnings, deductions, and information regions.

   See: Business Group: Entering SOE Information, page 1-31

4. Create an element set containing all the elements that you want to see displayed in the information region of the SOE.

   For South Africa only: The Information region has been renamed to Fringe Benefits and Other Non Payments region. You use the predefined ZA SOE Fringe Benefits and Other Non Payments element set to display information in that region. You enter this element set in the Elements 3 field when you define your SOE Information at business group level.

   The South African localization does not use balance attribution.

   Users should now restart the Apache server as instructed in the final step.

5. Complete the SOE Detail Information EIT by adding the elements in your element set, and the SOE display balances to the EIT at the business group level.

   See: Business Group: Entering SOE Detail Information, page 1-32

6. Link the predefined SOE balance attribute to your business group. The attribute name is likely to have a leading localization code followed by the stem _SOE_BALANCE_ATTRIBUTES.

7. Define the attributes for your SOE balances.

8. Restart the Apache server and then check the SOE to ensure that the SOE displays the requirements that you selected.

Running the Enable or Disable Global SOE Process

You use this process to determine how your statements of earnings are displayed. You have a choice of the forms-based SOE, or the global SOE which is framework-based and readily customizable. You can either:

- Enable the global SOE if you want to override the forms-based default
- Disable the global SOE if you prefer to continue using the old forms-based format.

You run the Enable or Disable Global SOE process from the Submit Request window.

To run the Enable or Disable Global SOE:

1. Select the Enable or Disable Global SOE process in the name field.

2. Enter whether you want to Disable or Enable the Global SOE in the parameters window.

3. Click OK and choose the Submit button.

Viewing Statement of Earnings

Oracle Payroll enables you to view an employee's statement of earnings (pay advice) without having to run the Pay Advice report.

You do this using the Statement of Earnings window.

There are various ways to access statement of earnings information. The information displayed may vary depending on whether you have run the PrePayments process or just a payroll run.

The information displayed in the Statement of Earnings window reflects the information in the printed pay advice.

The payroll run generates four types of Statement of Earnings (SOE):

- Master Assignment Action SOE for each employee and shows aggregate Year to Date balances

- Regular Payroll Run SOE for each employee and shows Period to Date and Year to Date balances
- Separate Check SOE only if employee has an element with Separate Check input value set to Yes
- Tax Separate Run SOE if employee has an element(s) with any of the following input values:
  - Separate Check set to Yes
  - Tax Separately set to Yes
  - Deduction Processing is set to other then All

Canada only: The Payroll Run SOE displays one "Master Assignment Action" master record and multiple records with second and third layer run types.

If you are processing Multiple Assignment Payments, then the PrePayment Statement of Earnings displays consolidated earnings and deductions information. The header information displayed on the Statement of Earnings is obtained from the primary assignment; however, if this assignment is not processed, then the header information is taken from the first assignment processed in the PrePayment process.

To view the last payroll with PrePayments run against it:

Perform one of the following:

- Select View | Statement of Earnings.
- From the Assignment window, choose Others and select Statement of Earnings.
- Choose the Statement of Earnings window in Fastpath.

To view the most recently run QuickPay results:

1. From the Assignment window, choose Others and select QuickPay.
2. Choose View Results, and select Statement of Earnings from the View Results window.

To view the statement of earnings information without running PrePayments:

See Viewing Assignment Process Results for an Assignment or Viewing Assignment Process Results for a Payroll Assignment.

Setting Up Payslip Information and Generating Payslips

You need to identify any additional information you want to appear on your payslips using payslip balances and elements. Once you have identified the information to archive and display, run your regular payment and archive processes and generate your payslip for printing or viewing online.

To set up your payslip:

1. Select the payslip balances and elements to be included in your payslips.

   See: Entering Payslip Information, page 1-32

   For UK, Netherlands, and South Africa: Enter the information balances and elements through the following:

   See: Identifying Balances for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide* and Identifying Elements for the Payslip, *Oracle HRMS Enterprise and Workforce Management Guide*

   For Ireland: Enter the balances and elements information in the SOE Balances and SOE Elements windows.

   See: Selecting SOE Balances, *Oracle HRMS for Ireland, Supplement* and Selecting SOE Elements, *Oracle HRMS for Ireland, Supplement*

2. For online payslips, enter self-service preference information to indicate how you want to view them. You can specify these settings at the organization, location, and person levels.

   See: Entering Self-Service Preference Information, page 1-33, Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*, and Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

3. Configure your online payslip to view through Oracle Self-Service.

   See: Online Payslip, *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*

   US, Canada, Mexico, and UAE only: Oracle Payroll uses an RTF template to produce the online payslip through XML Publisher. You can use the default template or create your own.

   See: Oracle XML Publisher Administration and Developer's Guide and Oracle XML Publisher Report Designer's Guide.

   For Ireland: To include the regular payment date of the payroll period in your online payslip, set the Visible property of the Regular Payment Date field to Yes.

4. **US, Canada, Mexico, and UAE only**: Oracle Payroll provides the ability to

customize the content of your employee payslips to suit your business needs. Prior to making any changes, however, you should review the default content to best determine what changes you require. See: Payslip Region Information, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

To change balances or include additional balances on the payslip:

1. From the Total Compensation menu, select Basic and then Balance.
2. Query for the element whose balance you want to add, and click Attribute.
3. Click on a new row under Attribute, and choose the attribute you want to display from the list of values. This represents where the current balance will appear on the payslip.
4. Choose a dimension from the list of values.
5. To delete an entry, select the row and click Delete.
6. Save your changes.

   Note: These changes do not take effect on the payslip until you rerun the Payroll Archiver Process for the affected payroll period.

Generating the Payslip

You must have completed the payroll runs, prepayments, and payment processes prior to generating the payslip.

5. Run the archive process to gather the latest payroll information.

   See: Extracting Information to Appear on the Payslip, page 3-6

6. You can view the payslip online through Self-Service.
7. Print your payslips in the usual way. Users in the Netherlands and China, run the payslip report to produce a formatted report ready for printing and sending out to your employees.

   See: Printing the Payslip, *Oracle HRMS Payroll Processing Management Guide*

Extracting Information to Appear on the Payslip

You run the payslip archive process to extract and gather relevant information to appear on your employees' payslips. The archiver accesses the payslip information for the dates you select and copies the information across to storage archive tables, where it is picked up and converted into a format for printing and distributing to employees or for viewing online through the self service application.

Run this process after each payroll period to enable Self-Service. You must complete the payroll runs, prepayments, and payment processes before you can run the payslip archive process.

Netherlands, US, and Mexico only: If you are producing paper reports, use this process to view your current payslip.

Run the payslip archiver from the Submit Request window.

To run the payslip archiver:

1. Select your country's payslip archive process in the Name field.

   China and Netherlands: Select the Payslip Archiver.

   India: Select the Payroll Reports Archive (India).

   Ireland: Select the IE Legislative Reports Generator. See: Running the Legislative Reports Generator, *Oracle HRMS for Ireland, Supplement*

   Mexico: Select the Payroll Archiver. See: Managing the Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Mexico)*

   South Africa: See: Pay Advice Generation - Self Service (South Africa), *Oracle HRMS for South Africa, Supplement*

   UK: See: Payslip Generation Self-Service, *Oracle HRMS Payroll Processing Management Guide (UK)*

   US and Canada Payroll: If required, you can set the PAY:Show Payslip with Zero Net Pay profile option to archive the payroll data and generate payslips for those employees receiving a net pay amount of zero.

   For US, see: Managing the Payroll Archive, *Oracle HRMS Payroll Processing Management Guide (US)*

   For Canada, see: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide (Canada)*

2. In the Parameters window, select a payroll name and consolidation set. This selects the employees for whom you want to run the report. When you select a payroll, the default consolidation set is displayed.

3. Enter the start and end dates for the period of time you want the information extracted. You typically run this process for the same dates you ran your payroll.

4. **India**: Select whether you want to mail individual payslip or view consolidated payslips in the Generate Payslip field.

5. Choose Submit.

After running the Payroll Archiver, you can use the Payroll Actions Not Processed report to see what employees (and corresponding payroll processes) were not archived

but did fall within the report's parameters.

Running the Pay Advice Report

Run this report to generate pay advice for all employees for a specified payroll and period. This is a sample report which you can customize. You run it after completing the Pre-payments process for a payroll. To check printing alignment before generating pay advice run the Pay Advice Alignment report.

You run the Pay Advice report from the Submit Requests window.

To run the Pay Advice report:

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.

2. Select the payroll for which you want to generate pay advices.

3. Enter the period for which you want to generate pay advices and the date on which you want to generate them.

4. Do one of the following:

   - If you want to generate pay advices for all employee assignments, leave the Assignment Number field blank.

   - If you want to generate a single pay advice for an employee assignment, enter the employee assignment number.

5. Select the sort orders 1 to 6 for employees whose mailing address is set to Office/Blank.

   Note: Use the people group flexfields to capture or configure office address details.

6. Choose the Submit button.

   Note: You can also view this report from the Assignment Process Results window, where you select an individual assignment and the process you want to view the report for.

4

Payroll Management

Payroll Statutory Deductions and Reporting Overview

Oracle Payroll enables you to ccalculate an employer's tax liability and deduct the appropriate sums from employee earnings. You can calculate employer and employee tax liabilities for all the taxes and statutory deductions that are applicable to your country. For example, this includes employer liability for state taxes such as State Unemployment Insurance and employee liability for federal, state and local taxes in the US, PAYE and NIC in the UK, PAYE and PRSI in Ireland, Social Security, Unemployment and Complementary Pension in France, Standard and Special tax and Social Insurance in the Netherlands, and so on.

In each instance, Oracle Payroll enables you to enter details of the tax liability and process it at regular intervals.

Reporting on Payroll Statutory Deductions

See: Reports and Processes in Oracle HRMS, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Taxes and Social Insurances in Oracle HRMS for China

Oracle Payroll allows you to process tax and insurance deductions for employers and employees, and helps you comply with the legislative requirements applying to your organization.

Is Oracle Payroll flexible enough to calculate taxes according to different legislative needs?

Yes. Oracle Payroll provides a flexible and robust framework to cater for legislative requirements of various regions and areas specific to China. It supports the legislative requirements of Beijing, Shanghai, Tianjin, and Shenzhen only.

Is the entry of tax and social insurance details sufficiently flexible to meet the needs of my organization?

Yes. You can calculate taxes for different types of employer to represent the diversity of your organization. You can also make retrospective adjustments to allow for overpayments and underpayments.

Is Oracle Payroll capable of implementing the latest updates to taxation and social insurance?

Oracle provides a flexible and robust framework for social insurances management, which you can maintain and update over the time. For taxation management, predefined values are available for Beijing, Shanghai, Tianjin and Shenzhen, which Oracle updates if there is any change. For other cities, you can set up and maintain the values.

Taxes and Social Insurances

China Tax and Social Insurances Information

Oracle Payroll for China enables you to calculate an employee's individual income tax and deduct the appropriate sums from an employee earnings. Oracle currently supports the following additional statutory earnings/deductions:

- Public Housing Fund and Social Insurances

Public Housing Fund and Social Insurances

Public Housing Fund and Social Insurances

Oracle HRMS for China enables you to enter and record information about employer and employee contributions to Public Housing Fund (PHF), Supplementary Public Housing Fund (SPHF), and other Social Insurances deductions. Oracle HRMS predefines six types of Social Security deductions, though not all of these are mandatory for each contribution area.

A contribution area refers to the region responsible for administering and collecting statutory deductions, excluding taxation.

An employee's contribution area may be different to their tax area.

The tax area determines an employee's taxation rate.

The following Social Security deductions are calculated prior to an employee's tax being calculated, the non-taxable contributions of the following deductions will decrease the taxable income, while the taxable contributions will increase the taxable income:

- Public Housing Fund
- Supplementary Public Housing Fund
- Basic Pension Insurance
- Basic Medical Insurance
- Unemployment Insurance

> **Note:** The contributions specified above are tax-free if they are made according to the rules stipulated at central government level and provincial levels. Any portion of the contributions made above the thresholds is subject to income tax.

The following Social Security deductions are all classified as pre-tax deductions, and are calculated prior to an employee's tax being deducted.

- Supplementary Medical Insurance
- Work-related Injury Insurance
- Maternity Insurance

When are PHF and SI Deductions Made?

PHF and SI deductions can be made once the employee has been hired or worked for the company for a specified period of time. In the latter case, once a probation period has been set and lapses, deductions commence and are calculated based on the employee's start date to the current payroll date.

Enterprise Annuity

Oracle HRMS enables you to record enterprise annuity information for your employees. Enterprise Annuity is an optional contribution made by both the employer and employee, and are payments made in addition to the old age pension.

Employees who have completed their probationary period with an organization are eligible to contribute to their enterprise annuity. The employee is entitled to receive the amount they have contributed once they have retired.

Contributions can be received as either a lump sum, or in installments. Contributions due from both employer and employee are calculated using a percentage or fixed rate. The contributions that an employee makes is calculated after tax has been deducted from the earnings. When the final amount is distributed to the employee, tax is also calculated and deducted on the employer's contributions and on the total earnings on the investment.

See: Setting Up Enterprise Annuity, page 4-9

Contribution Areas

Different contribution areas will have different deduction rates also, and not all the areas have mandatory contributions for each of the Social Insurances deductions noted above.

The following four contribution and tax areas have been predefined:

- Beijing
- Shanghai
- Shenzhen
- Tianjin

You also have the option of creating additional contribution areas when you implement Oracle HRMS for China.

> **Note:** Additional information for each contribution and tax area such as PHF/SI rates and special payment taxation, should be defined at the business group level.

How are my deductions calculated?

Deductions due from both employer and employee are calculated using a percentage or fixed rate, and then applying that to a calculated contribution base. The contribution base is the amount of earnings used when calculating the deduction amount.

The contribution base is normally fixed, once calculated, for a specified time, until it is recalculated. The time when the contribution base is recalculated is referred to as the 'switch period'.

Employers and employees can have different contribution bases.

Annual Bonus

Oracle Payroll enables employers to calculate employees' Individual Income Tax (IIT) payable on the Annual Bonus, once per taxation year.

You include all the other forms of bonus payments such as semi-annual bonuses, quarterly bonuses, overtime bonuses, and attendance bonuses with the normal salary income for individual income tax purposes.

If an employee receives multiple bonuses, you can select only one each year as the annual bonus, by entering an element in the Annual Bonus classification. Oracle Payroll calculates tax for elements in this classification using the preferential tax policy.

Income Tax Calculation for Employees in Specific Industries

Oracle Payroll enables employers to calculate income tax for employees in specific industries such as ocean-shipping, deep sea fishing and mining, who receive their profits or the rest of their annual salary as a lump sum amount once every year.

The last payment that yearly-rated employees receive for a year is subject to the preferential tax policy of annual bonus.

The employers can disburse the amount either at the end of the current year or at the beginning of the following year. Hence while calculating the tax for these additional earnings, the employer determines the yearly total earnings and yearly income tax of the employee depending on the year for which it is being paid.

Example

For example: If you pay the employee in the month of December, then you must consider the employee's current year's earnings and calculate income tax. If you pay the employee in the month of January, then you must consider the employee's previous

year's earnings and calculate income tax.

Pre Tax Non Statutory Deductions

Oracle Payroll enables you to deduct and process certain non-statutory deductions, such as sick leave deductions, unpaid leave deductions, salary deductions due to poor performance etc. from employees' base earning before individual income tax is calculated. You can process these pre-tax non-statutory deductions before PHF/SI contribution is calculated and then deduct from gross earning or you can process them later.

Oracle provides a new element primary classification Pre Tax Non Statutory Deductions with several Secondary Classifications such as Leave Pay Elements, Notice Pay Elements, PHF SI Elements, Severance Pay Elements, and Termination Pay Elements

You can setup your own element, based on the primary and secondary classifications. The application creates appropriate balance feeds and calculates taxes. You can set the priority and the secondary classifications of the elements according to business requirement (whether you want the elements to be deducted before processing PHF SI Deductions, whether you want the amounts to be deducted from the contribution base calculation of PHF SI Deductions, or salary base calculation for Leave Pay etc.). Oracle also supports retrospective processing for these deductions.

Entering and Maintaining Public Housing Fund, Social Insurance, and Enterprise Annuity information using HTML Pages

Users can now enter and maintain the Public Housing Fund (PHF), Supplementary Public Housing Fund (SPHF)Social Insurance (SI), and Enterprise Annuity (EA) information at a China business group level using HTML pages. Users can query, add, correct and delete records using this user-friendly interface.

Users can use the Enter and Maintain PHF/SI/EA Rules function, which is attached to the CN HRMS Navigator under Total Compensation > Basics to access the HTML pages.

Click on the Enter and Maintain PHF/SI/EA Rules function to take you to the Manage Social Security /Enterprise Annuity Basis and Rates page. This page includes the Search and the Results regions.

You can search by using any of the criteria - Contribution Area, PHF/SI/EA type, Effective Date and Organization (only applicable to rate management) and view the details in the Results region.

The Results region displays the results for contribution basis and contribution rates in separate tabs – Basis and Rates. Users can switch between the Basis and Rates tabs to view the related information.

Creating Contribution Basis or Contribution Rates Records

Users can create the contribution basis calculation rules or contribution rates for public housing fund, or a social insurance type or enterprise annuity management in a territory using the Create button on the corresponding tab.

Users can create new basis or rates records by entering the appropriate input values on the Basis Create and Rates Create pages and clicking on Apply. The application then validates the data and saves the record if there are no errors. On the Confirmation page, users can choose to add more records or return back to query page. If there are any errors, the application displays the error message on the top of the page.

Correcting Contribution Basis or Contribution Rates Records

If there is any update required to the existing information, users can use the Correct icon on the appropriate tab. Clicking on the Correct icon takes you to the Basis Update or the Rates Update page. The Update page displays the information of the selected record. After you make a correction and click Apply, the application validates the updated information. On successful validation, the application saves the data in the database. If there is an error, the application takes you back to the Query page.

Deleting Contribution Basis or Contribution Rates Records

Users can delete a record by clicking the Delete icon in Query results page. The application requests for confirmation before deleting a record.

Menu and Function Names

This feature can be accessed from the following menus and functions:

User Menu Name	Function Name
CN HRMS Navigator	Enter and Maintain PHF/SI/EA Rules

Setting Up Special Payments Taxation Element

The Special Payments Taxation classification includes elements that represent certain Special Payments payable to employees that are taxable payments and are further categorized into:

- Festival Gratuity payments
- Bonuses

- 13th month salary
- Sales commissions

Oracle recommends you use the Element Design Wizard when you set up your localization, to create all the input values, balance feeds, formulas and formula results for the Special Payments.

You can define elements in the Elements window, but the Element Design Wizard streamlines the element definition process, defining your elements faster than in the standard payroll windows. If you want to define elements in the Elements window, you must perform some initial setup.

The method of taxation for the Special Payment is determined by the employee's Tax Area. If a Special Payments element has a taxation method of Spread, then the element must have an input value of Number Of Periods as well as a Pay Value.

All Special Payments elements must have a formula attached to them, which will identify the Tax Area of the employee being processed by the payroll and therefore determine the method of taxation for the Special Payment. The formula result rules will cause up to three additional elements to be created :

1. Special Payments Separate
2. Special Payments Spread
3. Special Payments Normal

Setting Up Public Housing Fund and Social Insurances Deductions

PHF and Social Insurances contributions that are made according to the rules set by central government and provincial governments are pre-tax deductions, but any portion of the contributions above the threshold line is subject to individual income tax. They are deducted from the workers' salaries before their tax is calculated. Follow these steps to perform some initial setup, before you process Public Housing and Social Insurances deductions.

1. Define balance feeds that are used in the Public Housing and Social Insurances calculations.

   See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*

2. Define contribution area rates

   See: Setting Up Contribution Area Rates, page 4-12

3. Define contribution area base rules

   See: Defining Contribution Area Base Rules, page 4-13

4. Define the Defer Deductions and Deduct in Probation Expiry fields in the Employer Information window.

   See: Entering Employer Information for a GRE, page 1-40

5. Select the contract that must be referenced by the assignment.

   See: Entering Employment Terms, page 5-35

6. Link the PHF and SI element to one or more payrolls using the Element Link window.

   See Defining an Element Link, *Oracle HRMS Compensation and Benefits Management Guide*

7. Enter the PHF and SI Information element for your workers using BEE or the Element Entries window.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up Enterprise Annuity Deductions

Enterprise Annuity is a voluntary old age insurance, supplementary to the basic old age pension and is classified as a post-tax deduction. The amount is deducted from the employees' salaries after their tax is calculated. Follow these steps to perform some initial setup, before you process Enterprise Annuity deductions.

1. Define contribution area rates using either the Organization window or the User Table, China Enterprise Annuity Contribution Rate.

   To define the contribution area rates using the Organization window, see: Setting Up Contribution Area Rates, page 4-12

2. Define the contribution area rates using the user table, and also select the rounding method.

   See: Setting up Values for the China Enterprise Annuity Contribution Rate User Table, page 4-10 and Selecting the Rounding Method for Enterprise Annuity, page 1-29

3. Define contribution area base rules.

   See: Defining Contribution Area Base Rules, page 4-13

4. Determine whether you need to calculate tax on the employer contribution at the business group or set up override values at GRE/Legal Entity level.

   See: Business Group: Entering Tax on Enterprise Annuity Employer Contribution, page 1-38

See: GRE/Legal Entity: Entering Tax on Enterprise Annuity Employer Contributions, page 1-43

5. Define the Enterprise Annuity Registration Authority and Enterprise Annuity Registration Number fields in the Employer Information window.

   See: Entering Employer Information for a GRE, page 1-40

6. Select the contract that must be referenced by the assignment.

   See: Entering Employment Terms, page 5-35

7. Link the Enterprise Annuity Information element to one or more payrolls using the Element Link window.

   See: Defining an Element Link, *Oracle HRMS Compensation and Benefits Management Guide*.

8. Enter the Enterprise Annuity Information element for your employees using BEE or the Element Entries window.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

9. Ensure to record the contribution area and tax area information in the Statutory Information tab of Assignment window.

   See: Entering Additional Assignment Details (Assignment Window), page 5-35

10. Set up the overriding contribution area for Enterprise Annuity at Further Element Entry Information level.

Setting up Values for the China Enterprise Annuity Contribution Rate User Table

You must set up the Enterprise Annuity deduction rates for employees and employers before processing the post-tax deductions.

When you define the rates using the China Enterprise Annuity Contribution Rate User Table, you override any values that you have set in the Organization window. To define the rates using the Organization window, see : Setting Up Contribution Area Rates, page 4-12

Use the Table Values window to set up the contribution area rates.

To set up values for China Enterprise Annuity Contribution Rate User Table:

1. Set your effective date to the appropriate date for adding the enterprise annuity

contribution rates.

2. In the Table field, query for the China Enterprise Annuity Contribution Rate user table.

3. Enter the Key Units of Measurement as Number.

4. In the Column region, select the Name as Employee Rate if you want to define the contribution rates for the employee. To define the contribution rates for the employer, select Employer Rate.

5. In the Values region, enter the minimum and maximum number of years of service in the Lower and Upper Bound fields. Enter the corresponding contribution percentage rate in the Values field.

6. Save your work.

Setting Up Annual Bonus Elements

Oracle Payroll enables employers to calculate an employees' Individual Income Tax (IIT) payable on the annual bonus received by them, once per taxation year.

You can define elements in the Element window, see: Setting Up Total Compensation Elements for Payroll, *Oracle HRMS Payroll Processing Management Guide*, to know about setting up total compensation elements.

To define elements in the Element window, follow these steps to perform some initial setup, before you process the income tax for these employees.

1. Define your elements with the primary classification as Annual Bonus to accept an input value for the annual bonus amount.

   To process retrospective earnings, you must define retro elements and attach them to the predefined retro components. You must ensure that the When Earned element belongs to the primary classification Retro Annual Bonus, and the When Paid element belongs to the primary classification Annual Bonus.

   See: Understanding the Sequence of Your RetroPay Activities, page 4-55

   For When Paid elements, you must also feed the input value Pay Value to the predefined balance, Retro Annual Bonus WP.

   See: Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

2. Link the user-defined elements to the appropriate payrolls. You must also link the following predefined elements:

   - Tax on Annual Bonus
   - Retro Tax on Annual Bonus

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

Business Group: Setting Up Contribution Area Rates

You must set up deduction rates for workers and employers before processing the Public Housing Fund and Social Insurances deductions.

Use the Organization window to set up the contribution area rates.

To set up the contribution area rates:

1. In the Name field, select the employer or organization for whom you want to set up the contribution area rates.

2. Select the organization classification as a business group, and click the Others button. This opens the Additional Organization Information window. Select PHF and SI Rates, and click the OK button.

3. In the PHF and SI Rates window, select the contribution area for which you want to set the deduction rate.

4. Select the organization, if you want to set the information only for the selected organization; otherwise, leave the field blank.

5. In the PHF or SI type field, select the type of deduction. Values include Public Housing Fund, Basic Pension, and Enterprise Annuity Insurance.

6. In the Hukou field, select the Hukou type to set up the calculation method for your worker's contribution base; otherwise, leave this field blank to use the default method with no Hukou type.

7. Enter the deduction rate for the worker. This amount may be a percentage or a fixed amount. The amount that you enter here depends on the value that you selected in the EE Percent or Fixed field.

8. Select the deduction rate type for the worker as a percentage rate or a fixed amount.

9. Enter the deduction rate for the employer. This amount may be a percentage or a fixed amount. The amount that you enter here depends on the value that you selected in the ER Percent or Fixed field.

10. Select the deduction rate type for the employer as a percentage rate or a fixed amount.

11. Select a rounding method for the worker and the employer, if you want to round the enterprise annuity contribution amounts during payroll processing; otherwise

leave the field blank. You require this information for statutory reporting.

12. Enter the tax threshold rates for the employee and employer.

13. Enter the effective start date of the deduction rates.

14. Enter the effective end date of the deduction rates; otherwise leave the field blank. If you leave the field blank, the application uses 31-Dec-4712 for all calculations.

    Important: If the contribution rates change, you must set the effective end date as the date on which the old contribution rate ends. You must also enter a new record for the new contribution rate with the effective start date as the date on which the new values take effect.

15. Click OK.

Related Topics

See: Setting Up Public Housing Fund and Social Insurances Deductions, page 4-8

Business Group: Setting Up Contribution Area Base Rules

You must set up the method of calculating the contribution base for a contribution area and organization.

Use the Organization window to define the contribution area base rule.

To set up the contribution base rules:

1. In the Name field, select the employer or organization for whom you want to set up the contribution area base rule.

2. Select the Organization Classification as a Business Group and choose the Others button. This opens the Additional Organization Information window. Select Contribution Basis and choose the OK button.

3. In the Contribution Basis window, select the Contribution Area.

4. Select the type of deduction in the PHF or SI type field. For example, Public Housing Fund, Basic Pension.

5. Select the Hokou type.

6. Select the contribution area's method of calculating the worker contribution base.

7. Enter the fixed amount to be deducted from the worker's contribution, if you have selected the employee contribution base as Fixed Amount.

8. Select the contribution area's method of calculating the employer contribution base.

9. Enter the fixed amount to be deducted from the employer's contribution, if you have selected the employer contribution base as Fixed Amount.

10. Select the method for calculating the lower limit of the worker's and employer's contribution base amount.

11. Enter the low limit amount if you have selected Fixed Amount as the low limit method.

12. Select the method for calculating the upper limit of the worker's and employer's contribution base amount.

13. Enter the high limit amount if you have selected Fixed Amount as the high limit method.

14. Select the frequency with which the contribution base must be recalculated in the Switch Period Periodicity field.

15. Enter the month in which the contribution base must be recalculated, if you have selected the periodicity as Yearly, otherwise leave the field blank.

16. Enter a rounding method if you want to round the contribution base amount to the nearest Jiao or Yuan, otherwise leave the field blank.

17. Select the lowest average salary for the contribution area, otherwise leave the field blank.

18. Select the average salary for the contribution area, otherwise leave the field blank. The average salary is the city's last year average salary or the province's last year average salary that the city belongs to.

19. Enter the effective start date of the deduction rates.

20. Enter the effective end date of the deduction rates, otherwise leave the field blank. If you leave the field blank, the system uses the date, 31-Dec-4712 for all calculations.

    Important: If the contribution bases change, you need to set the effective end date as the date on which the old contribution base ends, and enter a new record for the new contribution base with the effective start date as the date on which the new values take effect.

21. Choose the OK button.

Related Topics

See: Setting Up Public Housing Fund and Social Insurances Deductions, page 4-8

Setting up Supplementary Public Housing Fund Information

You can record Supplementary Public Housing Fund Information for employees. To ensure you record and calculate the SPHF information accurately, follow the steps given below:

1. Record the employee and employer Contribution Bases and Rates for Supplementary PHF. You can record the contribution bases and rates using either the forms or self service pages.

   See: Business Group: Setting Up Contribution Area Rates, page 4-12

   See: Business Group: Setting Up Contribution Area Base Rules, page 4-13

   See: Entering and Maintaining Public Housing Fund, Social Insurance, and Enterprise Annuity information using HTML Pages, page 4-6

   See: Entering PHF/SI Information Elements, page 4-17

2. Create element entries of the SPHF Information element to determine if the employee is eligible for calculating contributions to Supplementary PHF. Set the account status to Open or Transfer in.

   See : Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

3. Run the payroll.

   See: Starting a Payroll Run, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up Income Tax for Employees in Specific Industries

Oracle Payroll enables employers to calculate income tax for employees in specific industries such as ocean-shipping, deep sea fishing, and mining.

Oracle recommends you use the Element Design Wizard when you set up your localization, to create all the input values, balance feeds, formulas and formula results for the Yearly Tax Calculation elements.

You can define elements in the Elements window, but the Element Design Wizard streamlines the element definition process, defining your elements faster than in the standard payroll windows.

If you want to define elements in the Elements window, follow these steps to perform some initial setup, before you process the income tax for these employees.

For information on processing income tax for yearly-rated employees, see: Processing Income Tax for Yearly Rated Employees, page 4-16.

1. Define your elements with the classification as Variable Yearly Earnings to be able to process the yearly earnings. To process retrospective earnings, you must define retro elements and attach them to the pre-seeded retro components. You must also ensure that the When Earned element belongs to the primary classification, Retro Variable Yearly Earnings, and the When Paid element belongs to the primary classification, Variable Yearly Earnings.

   See: Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide* .

2. Link the user-defined elements to the appropriate payrolls. You must also link the following predefined elements:

   - Retro Previous Year Variable Earnings WE
   - Retro Current Year Variable Earnings WE
   - Retro Previous Year Variable Earnings WP
   - Retro Current Year Variable Earnings WP
   - Retro Tax Variable Deduction

   See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*.

3. Attach the formula, CN_YRLY_EARNINGS_XFER to all the user-defined elements for yearly tax calculation. These formulas feed the seeded elements, Previous Year Variable Earnings or Current Year Variable Earnings depending on the input value, and the period for which the Yearly Variable Earnings is being paid.

   See: Defining Formula Processing and Result Rules, *Oracle HRMS Compensation and Benefits Management Guide*.

Processing Income Tax for Employees

Follow these steps to process the yearly tax calculations for employees in specific industries after it has been set up in Oracle HRMS.

To set up income tax for employees in specific industries, see: Setting Up Income Tax Employees in Specific Industries, page 4-15

1. Populate the Special Tax Exemption Category in the Statutory Information window

to indicate that the employee is eligible for the special tax exemption.

See: Entering Additional Assignment Details (Assignment Window), page 5-35

2. Attach the user-defined elements to the employee, for whom you will be paying the variable yearly earnings. You must specify the period for the user-defined element in the Element Entry window for the employee.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*.

3. Run the payroll.

   See: Starting a Payroll Run, *Oracle HRMS Compensation and Benefits Management Guide*.

Entering PHF/SI Information Elements

Use the PHF/SI Information elements to enter an employee's public housing fund and social insurances information. You use these elements to override the contribution area information of an employee.

You enter Public Housing Fund and Social Insurances (PHF)/SI information in the Element Entries window.

To enter PHF/SI information for an employee:

1. Query your employee in the People window, and ensure that your effective date falls within the payroll-processing period for which you want to enter the PHF/SI information.

2. Select one of the following PHF/SI Information elements in the Element Entries window.

   - PHF Information
   - Supplementary Public Housing Fund Information
   - Maternity Insurance Information
   - Medical Information
   - Supplementary Medical Information
   - Unemployment Insurance Information
   - Pension Information
   - Injury Insurance Information

3. In the Entry Values window:
   - Enter the PHF/SI account number and the status of the account for the employee.
   - Select the contribution area in the Further Entry Information field. The contribution area you enter here overrides the value entered in the Statutory Information window.
4. Save your work.

Running the Monthly PHF/SI Contribution Amount Report

Run this report once a month to generate a text-delimited report. This report contains information about the PHF/SI contribution amount deducted by the employer from the employee's salary for the current month. The enterprise uses this report to fill the pre-print government form, and then sends the form to the local PHF/SI management centre.

You run the China PHF/SI Contribution Amount Monthly Report from the Submit Requests window.

To run the China PHF/SI Contribution Amount Monthly Report:

1. In the Name field, select China PHF/SI Contribution Amount Monthly Report. The Parameters window opens.
2. Select the PHF/SI type to generate the report for the selected insurance type.
3. Select the legal employer to process.
4. Select the contribution area to process. The contribution area must be the same as the contribution area of the assignment.

   The contribution area that you entered in the Further Element Information is given priority over the contribution area that you specified in the Statutory Information tab in the Assignment window.
5. Enter the year and the month for which you want to generate the Contribution Amount Monthly report.
6. Click Submit.

Setting Up Pre Tax Non Statutory Deductions

Oracle Payroll enables you to deduct and process certain non-statutory deductions from employees' base earning before individual income tax is calculated. You can process

these pre tax non-statutory deductions before PHF/SI contribution is calculated and then deduct from gross earning or you can process them later.

To process Pre Tax Non Statutory Deductions, perform the following steps:

1. Use the Primary Classification Pre Tax Non Statutory Deductions to process any of the pre tax non statutory deductions.

   See: Survey of the Classification, page 2-2

2. Define your elements with the primary classification, as well as appropriate Secondary Classifications. These elements feed to the corresponding balance and reduce the balance.

   - Leave Pay Deduction Constituents
   - Notice Pay Deduction Constituents
   - PHF SI Deduction Constituents
   - Severance Pay Deduction Constituents
   - Termination Pay Deduction Constituents

   See:Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

3. You can set the priority and the secondary classifications of the elements according to business requirement (whether you want the elements to be deducted before processing PHF SI Deductions, whether you want the amounts to be deducted from the contribution base calculation of PHF SI Deductions, or salary base calculation for Leave Pay.

   See:Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

4. Link the elements.

   See:Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

Setting up Retro Pre Tax Non Statutory Deductions

You can compute any retrospective changes to pre tax non-statutory deductions by creating retro elements of the Classification Retro Pre Tax Non Statutory Deductions when you are in Tax when Earned mode, and retro elements of the Classification Pre Tax Non Statutory Deductions when you are in Tax when Paid mode.

To process retro pre tax non statutory deductions, perform the following steps:

1. Use the Primary Classification Retro Pre Tax Non Statutory Deductions to process any of the pre tax non statutory deductions in Tax when Earned mode, and Pre Tax

Non Statutory Deductions in Tax when Paid mode

See: Survey of the Classification, page 2-2

2. Define your elements with the primary classification, as well as appropriate Secondary Classifications. These elements feed to the corresponding balance and reduce the balance.
   - Leave Pay Deduction Constituents
   - Notice Pay Deduction Constituents
   - PHF SI Deduction Constituents
   - Severance Pay Deduction Constituents
   - Termination Pay Deduction Constituents

   See:Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

3. You can set the priority and the secondary classifications of the elements according to business requirement (whether you want the elements to be deducted before processing PHF SI Deductions, whether you want the amounts to be deducted from the contribution base calculation of PHF SI Deductions, or salary base calculation for Leave Pay.

   See:Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

4. Link the retro elements.

   See:Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

Running the PHF/SI Contribution Base Yearly Report

Run this yearly report to generate a text-delimited report that contains information about the employee's and employer's contribution base for the next year. The enterprise uses this report to fill the pre-print government forms and then sends the form to the local PHF/SI management centre.

You must run this report before you run the payroll process for the switch period month and after the payroll process for the previous month.

You run the China PHF/SI Contribution Base Yearly Report from the Submit Requests window.

To run the China PHF/SI Contribution Base Yearly Report:

1. In the Name field, select China PHF/SI Contribution Base Yearly Report. The

Parameters window opens.

2. Select the PHF/SI type to generate the report for the selected insurance type.

3. Select the legal employer to process.

4. Select the contribution area to process. The contribution area must be the same as the contribution area of the assignment.

   The contribution area that you entered in the Further Element Information is given priority over the contribution area that you specified in the Statutory Information tab in the Assignment window.

5. Enter the year for which you want to generate the Contribution Base Yearly report.

6. Click Submit.

Running the Monthly PHF/SI Employee Movement Report

Run this report once a month to generate a text-delimited report. You use this as a sample report to fill the pre-print government form, and then send the form to the local PHF/SI management centre. The generated report contains information about:

- new PHF/SI accounts created for new or transferred employees
- closed PHF/SI accounts of existing employees who have been transferred or have left
- closed PHF/SI accounts of employees who have expired.

You run the China PHF/SI Employee Monthly Movement Report from the Submit Requests window.

To run the China PHF/SI Employee Monthly Movement Report:

1. In the Name field, select China PHF/SI Employee Monthly Movement Report. The Parameters window opens.

2. Select the PHF/SI type to generate the report for the selected insurance type.

3. Select the legal employer to process.

4. Select the contribution area to process. The contribution area must be the same as the contribution area of the assignment.

   The contribution area that you entered in the Further Element Information is given priority over the contribution area that you specified in the Statutory Information tab in the Assignment window.

5. Enter the year and the month for which you want to generate the Contribution Amount Monthly report.

6. Enter the date on which you will fill the report. The default filling date is the system date.

7. Click Submit.

Running the Employee Income Payment Detail Report

You need to fill and submit the Employee Income Payment Detail report on a monthly basis for all your workers, even if the worker's total income is less than the tax exemption amount for the corresponding city or region. The Employee Income Payment Detail report is required by the taxation administration as a supplementary report to the Individual Income Tax Withholding report, and contains detailed information for the summarized information provided in the Individual Income Tax Withholding report.

You run the Employee Income Payment Detail report from the Submit Request window.

To run the Employee Income Payment Detail report:

1. In the Name field, select Employee Income Payment Detail Report (China). The Parameters window opens.

2. Enter the effective start and end dates for the time span for which you want to run the report.

3. Select the Tax Area to process the report for the selected tax area only, otherwise leave the field blank to process the report for all tax areas.

4. Select the employee type.

5. Select the report category to report either the annual bonus information or the wage/salary information for statutory reporting purposes.

6. Enter the date you are submitting the report, otherwise leave the field blank. If you leave the field blank, the application will default to the system date.

7. Use the Sort Order fields to order the run report by organization, location, employee name, and employee number. The default order is to sort by tax rate and then by employee number.

8. Choose the Submit button.

Running the Individual Income Tax Withholding Report

Use the Individual Income Tax Withholding Report to send your enterprise's declaration on the withholding of income tax. This monthly report provides summarized information for all tax group rates separately.

You run the Individual Income Tax Withholding report from the Submit Request window.

To run the Individual Income Tax Withholding report:

1. In the Name field, select Individual Income Tax Withholding (China). The Parameters window opens.
2. Enter the effective start and end dates for the time span for which you want to run the report.
3. Select the payroll details to override the consolidation set and process the report only for the selected payroll, otherwise leave the field blank.
4. Select the consolidation set to process reports with the selected consolidation set, otherwise leave the field blank to process the report for all consolidation sets.
5. Select the Tax Area to process the report only for the selected tax area, otherwise leave the field blank to process the report for all tax areas.
6. Select the employee type.
7. Select the report category to report either the annual bonus information or the wage/salary information for statutory reporting purpose.
8. Enter the date you are submitting the report, otherwise leave the field blank. If you leave the field blank, the application will default to the system date.
9. Enter the date of tax payment to display in the report.
10. Choose the Submit button.

Setting up Taxable Benefits

Employer pays certain benefits to employees outside of payroll which must be added to the taxable income for individual income tax calculation and withholding. These benefits must not be considered in gross pay and net pay calculation. To include Taxable Benefits in the taxable income, perform the following steps:

To set up Taxable Benefits:

1. Create an element with primary classification as Taxable Benefits.
2. Create element entries to specify the benefit amount to be included in the taxable income calculation for a pay period.
3. Run the Quickpay or payroll
4. View the SOE or payslip.

Termination Payments

Termination Payments

Terminating an assignment involves the processing of termination payments and termination deductions. Each of these is calculated according to the type of termination and the appropriate payment or deduction classification.

Terminations within Oracle HRMS for China can be either:

- Severance Payment
- Termination Payment

The type of termination will determine the taxation treatment of termination payments. Both severance payment and termination payment are subject to individual income tax, but they are taxed differently.

Termination Payments may comprise of any or both of the following types:

- Leave compensation for annual leave balance
- Pay In lieu of short notice period

Termination payments within Oracle HRMS for China are calculated using elements within particular element classifications.

Setting Up Termination Payments

Before a termination payment can be made, you must set up the termination elements and plans at implementation.

Follow the given steps for setting up termination payments within Oracle Payroll for China.

To set up PTO accrual plans:

If the termination type is leave compensation for annual leave balance, then you must set up the PTO accrual plan.

See: Setting Up PTO Accrual Plans, *Oracle HRMS Compensation and Benefits Management Guide*.

To link predefined termination elements:

The following predefined elements must be linked during implementation:

- Leave Compensation

- Pay in lieu of Short Notice

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*.

To set up the secondary classifications:

Set up the secondary classifications for each of the element that you define in the Taxable Earnings classification, if you use the element for calculating the daily salary of termination payment. For example, set up the secondary classification - Leave Pay Constituents and Notice Pay Constituents for base salary element.

See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*.

Setting Up Severance Payments

Before a severance payment can be made, you must set up the severance elements at implementation.

Follow the given steps for setting up severance payments within Oracle Payroll for China.

To set up Severance Payment Tax Exempt Amount:

Use the Table Values window to set up the severance payment tax exempt amount.

1. In the Other Definitions > Table Structure window, query for China Severance Pay Tax Exempt Amount.
2. In the Table field, query for China Severance Pay Tax Exempt Amount. This displays the details of the table in which you want to make entries.
3. Click Rows and add a row for the tax area you want to enter values (for example GZ).
4. Save your work and close the window.
5. In the Other Definitions > Table Values window, query for China Severance Pay Tax Exempt Amount.
6. In the Values region, select each row for which you want to make an entry. You select rows in the Exact field.
7. For each row, make the appropriate entry in the Value field (for example GZ and 2000).
8. Save your work.

To link predefined termination elements:

Link the predefined element, Severance Payments during implementation.

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

To set up the secondary classifications:

Set up the secondary classifications for each of the element that you define in the Taxable Earnings classification,,if you use the element for calculating the monthly salary of severance payment. For example, set up the secondary classification - Severance Pay Constituents for base salary element.

See: Creating Classes of Balance Feeds, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up for Exporting Payroll Information for China Accounting Software Data Interface Standard

1. Check the responsibility and user privileges to access payroll detail information.
   - Ensure that China Payroll Data Export Process is available under the delivered responsibility - China Accounting Data Interface
   - You may create your own responsibility
   - China Payroll Data Export Process is also attached to CN HRMS Reports and Processes request group

   See: Responsibilities, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

2. Set up system profiles for the responsibility.

   See: System Profile Values, Oracle Applications System Administrator's Guide.

3. Verify the predefined lookups available for this project. If required, you can make changes to the lookup values if the lookup tables are set so:
   - CN_CNAO_CORP_INFO
   - CN_AUDIT_YEAR
   - CN_SOE_LABELS CN_DEGREE
   - CN_AUDIT_DATA
   - CN_MINISTRY_LABELS

- CN_CADRE_JOB_CLASS
- CN_HIGH_EDU_LEVEL
- CN_FORM_LABELS

See: User and Extensible Lookups, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

4. Create a security profile.

   Important: A security profile must have only one legal entity and the GREs belonging to this legal entity. GREs do not have values under Corporate Information. You can map a GRE to a legal entity through the Corporate Organization field. Within the security profile definition, it is mandatory to define payroll security if you have payrolls mapped to more than one ledger. One security profile shall cover payrolls mapped to one and only one ledger.

   See: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   See: Defining a Security Profile, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

5. Attach profile to the responsibility.

   Set these profiles to the Business Group if created in Single Security Profile Mode:

   - HR Security Profile
   - HR Business Group

   Or assign the business group as the Security Profile for all the responsibilities if created in the Multiple Security Profile mode.

   See: Security Models, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

   See: Assigning Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

6. You must record the following information to ensure accurate reporting:

   - Degree under the Miscellaneous tabbed region of Person window
   - Cadre Job Details within the Special Information Type

   See: Entering Additional Personal Information, page 5-13

See: Special Information Types, page 5-7

7. The list of values for Highest Education Level has been updated according to the latest national standard. Please verify the values and check proper data is set up for employees you want to export.

   See: User and Extensible Lookups, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

8. Specify the standard to apply for your entity at legal entity level.

   See: Entering Corporate Information, page 1-41

9. Select the cost allocation flexfield of your business group and specify the segment storing expenditure economy category code.

   See: Entering Audit Expenditure Setup Information, page 1-28

10. Select the elements and balances to export at the legal entity level.

    See: Entering Audit Balance Setup Information for Legal Entity, page 1-39

    See: Entering Audit Element Setup Information for Legal Entity, page 1-39

    > **Important:** You must archive the elements and balances to be exported using the Payslip Archive (China) program. If you do not, the output for session: individual payroll detailed records will not be complete.

11. Run the China Payroll Data Export Process.

    See: Running China Payroll Data Export Process, page 4-29

12. To export HR related information, run the China Shared Information Data Export program available under the China Accounting Data Interface responsibility.

13.

Running China Payroll Data Export Process

Run this process to generate XML reports of payroll information for China Data Interface of Accounting Software Standard for state owned enterprises or non-profit government agencies for reporting purposes. Based on the security profile from which you run the program, the application selects a legal entity and generates the XML report based on the value selected for the Data Interface of Accounting Software Standard within the Corporate information window.

You can run this process only after you have run the Payroll process, Prepayment process, and Payslip Archive (China).

To run China Payroll Data Export process:

1. In the Name field, select China Payroll Data Export process. The Parameters window opens.

2. Select the Action Parameter Group to change the number of threads in which this program runs.

   Important: Ensure that the Transfer to GL Process transfer on date earned rule is set correctly to E or EVE. This is optional. If not set, the application uses the default values.

3. Select the following values for which you want to export the data:
   - accounting year
   - accounting period from
   - accounting period to

4. Click OK and submit.

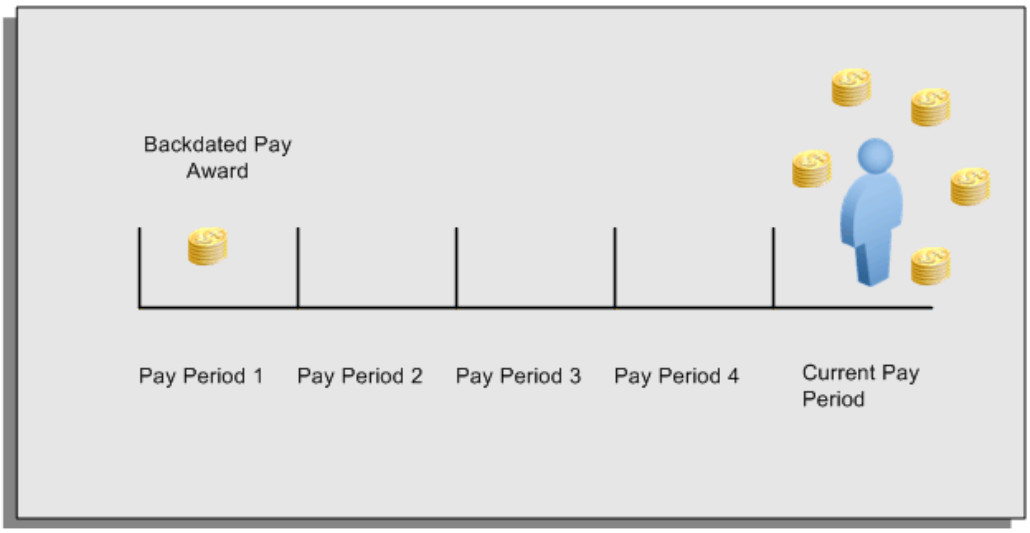
RetroPay Processing

Overview of RetroPay Processing

Purpose of the RetroPay Process

Run the RetroPay process to ensure that your payroll run for the current period reflects any backdated payments or deductions. Backdated adjustments can occur when:

- An employee receives a pay award that is backdated to a previous pay period.
- The payroll department makes a retrospective correction for an error that occurred in a previous pay period

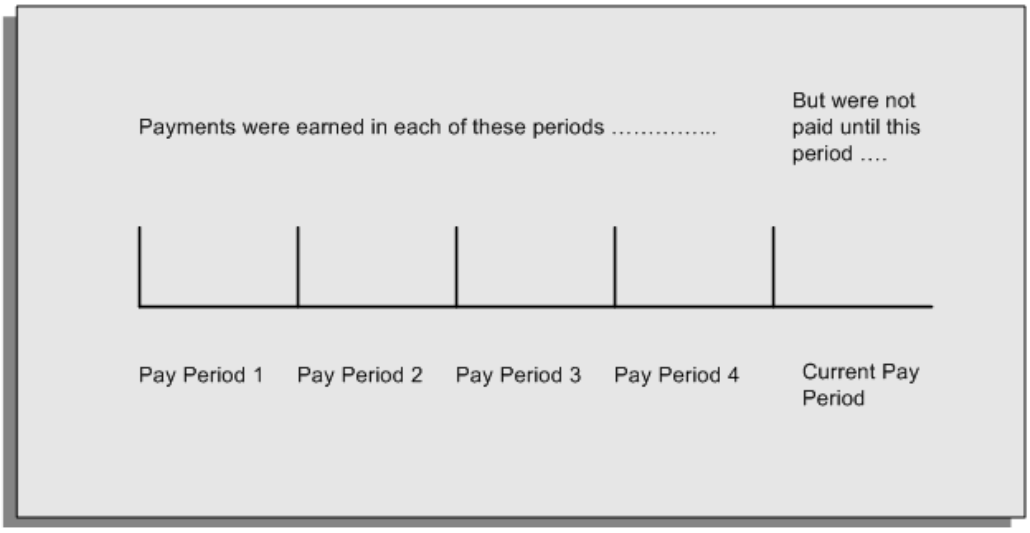


For example, at the start of the current pay period, this employee has a pay award backdated to pay period 1. The employee has not yet received any payments for this award. In the current pay period the employee is entitled to payments that represent the backdated amounts for:

- Each of the preceding payroll periods (pay periods 1 to 4)
- The current pay period

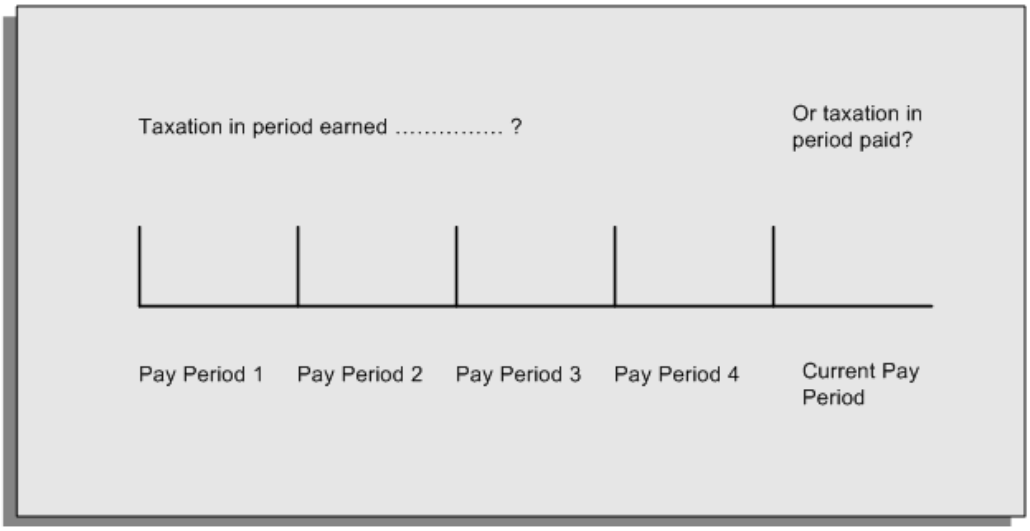
You run your RetroPay process to ensure that the employee receives correct payment when you next run the payroll.

Period Earned is Distinct from Period Paid



When backdated payments occur, the accuracy of your subsequent payroll processing depends on distinguishing between:

- The period in which the payment was earned
- The period in which the payment was made

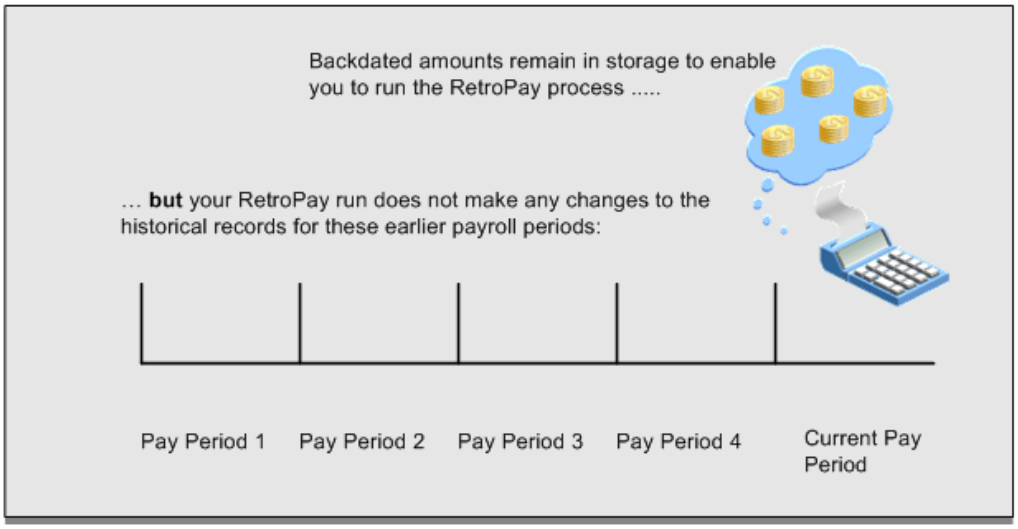


For example, the taxation implications are different for:

- A pay award backdated to period 1 and not paid until the current period. You may want to tax this award in the current period.

- A correction to an underpayment in period 3 which is paid to the employee in the current period. You may want to tax this correction in period 3 rather than in the current period.

The RetroPay Process Does Not Overwrite Your Historical Payment Records



You never overwrite historical payroll data when you run RetroPay. Although you recalculate all periods that have retroactive changes whenever you run a RetroPay, you never modify the stored results for these periods. Instead, you create one or more RetroPay entries to receive the process results.

Think of the RetroPay process as a calculator holding results in memory so that it can process a final set of results. The RetroPay process uses your historical results to calculate the changes for the current period. The results for your current period change, but your historical records remain unchanged.

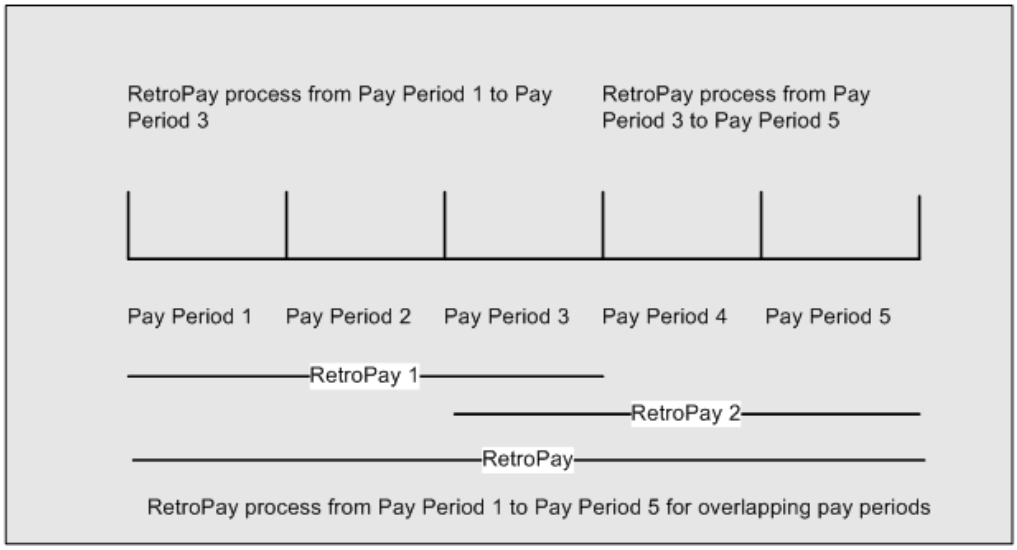
Process RetroPay with Overlapping Periods

The RetroPay process recalculates payroll runs, balance adjustments and reversals from a particular date onwards, the start date of the recalculations. When you have retroactive changes overlapping another retroactive change, the application resets the start date to the earliest start date of the RetroPay processes and recalculates.

For example, you perform a RetroPay (RetroPay 1)for an assignment in period 3, with Payroll Runs being recalculated from a start date of period 1. In period 5, you perform another RetroPay (RetroPay 2) for the assignment with a start date of Period 3. The second RetroPay detects an overlap of RetroPays and sets the start date to the earliest start date.

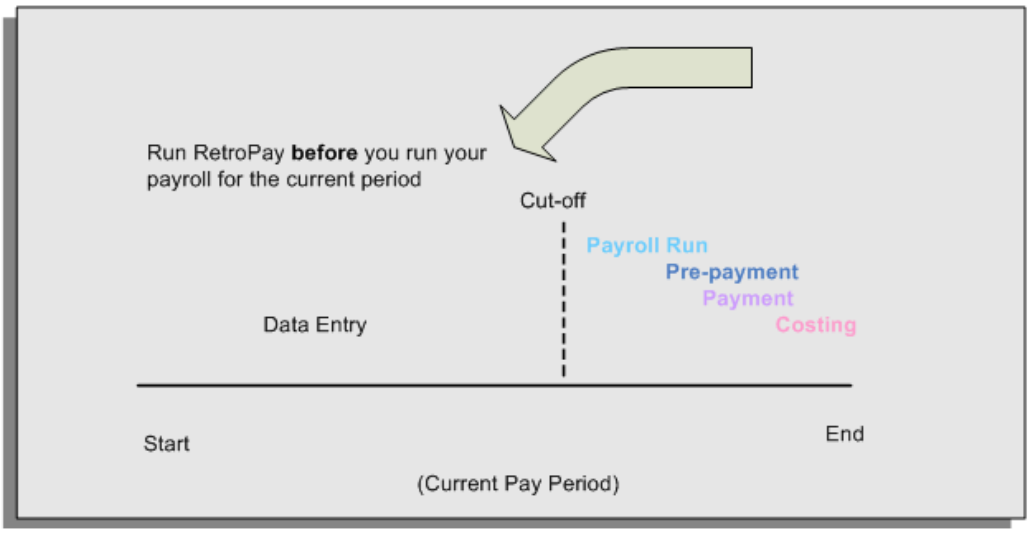
In this case, the application sets the start date as Period 1. An overlapping override occurs to ensure that the balances are correct for the RetroPay process.

The processing of overlapping RetroPay results in an overall increase in time to process the RetroPay. If there are multiple overlaps, the increase in time is excessive.



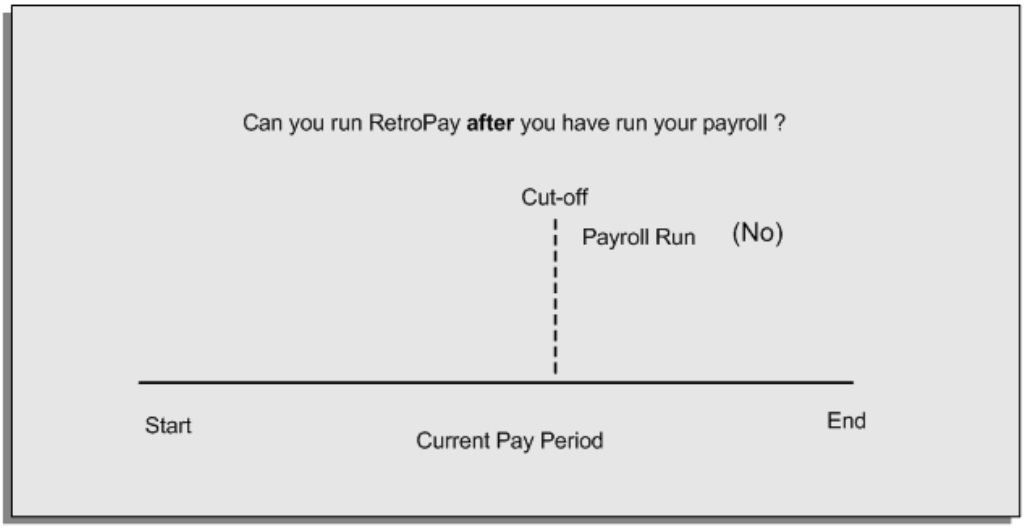
When to Run the RetroPay Process

The RetroPay Process and the Payroll Cycle



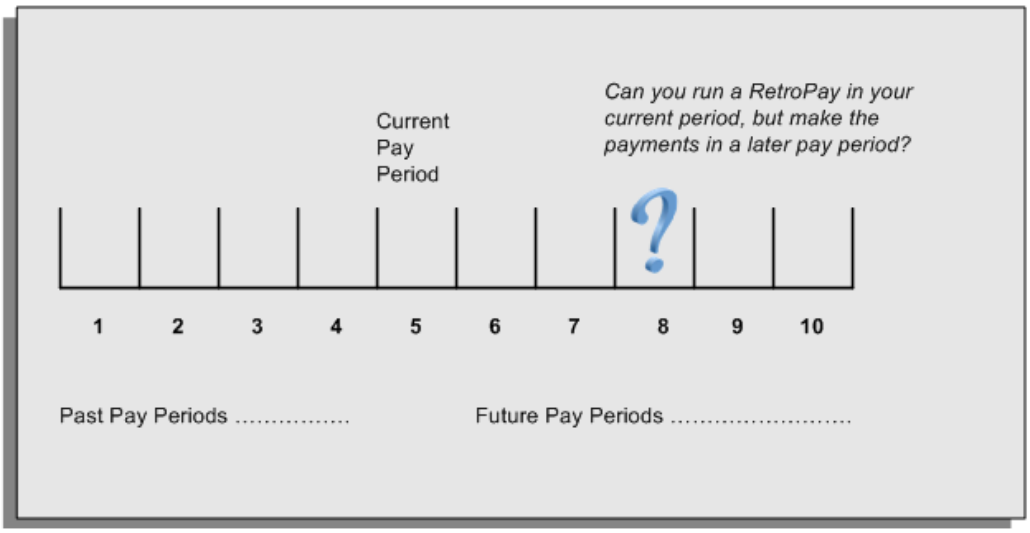
It is important to run your RetroPay process at the correct point in the payroll cycle. Always run RetroPay immediately before you run a payroll, and, for greatest accuracy, as close to the cut-off date as possible. The cut-off date is the point at which all data entry for the payroll is complete.

The RetroPay Process Always Precedes a Payroll Run



The RetroPay process cannot occur after your payroll run. If you run your payroll and then discover further backdated adjustments you must hold them over until a later payroll period and run the RetroPay process in that subsequent payroll period.

Backdated Adjustments Are Always Paid in the First Open Payroll Period



When you run a RetroPay process in your current payroll period, any backdated adjustments are always paid in your current payroll period. So, a RetroPay process in period 5 calculates any backdated adjustments from periods 1 to 4, and marks them for payment in period 5.

You cannot stipulate that a RetroPay process in period 5 should withhold any resulting payments until a future pay period. For example, you cannot stipulate that a RetroPay run in period 5 should withhold payments until period 8.

If you want to use a future payroll period such as period 8 to make payments of backdated amounts for periods 1 to 4, then you must wait until period 8 before you run your RetroPay process.

Troubleshooting RetroPay

The most common RetroPay problems occur when the RetroPay process completes, but produces unexpected results.

Consult these tables for quick reference on common RetroPay difficulties and their solutions. The problem description links or refers to extra information where you need more details to solve a problem.

- Troubleshooting Enhanced RetroPay and Retro-Notification, page 4-36
- Troubleshooting Earlier Versions of RetroPay, page 4-37

Troubleshooting Enhanced RetroPay and Retro-Notification

Problem Description	What to Do
Enhanced RetroPay is not available when you expected it to be, or you do not have the Retro Components button on the Recalculation tab of the Elements window.	This is a single problem - your localization has not implemented the legislation rule ADVANCED_RETRO.
View RetroPay Status does not display some of my expected choices	Contact your System Administrator. The configuration of View RetroPay Status is determined at setup. If the legislation rule RETRO_STATUS_USER_UPD is set to Y, then you have a choice when you view RetroPay status. You can either exclude the assignment from RetroPay processing (you select Deferred), or include it (you select Confirmed Awaiting Processing). However, if RETRO_STATUS_USER_UPD is set to N, then the assignment is automatically included in the next RetroPay run (it displays in View RetroPay Status as Included Awaiting Processing).

Problem Description	What to Do
After setting up Enhanced RetroPay for the United States, the Enhanced RetroPay run does not produce any results. Also: the Retro-Notification report (Enhanced) for the United States does not record a salary change for an employee unless you add the changed details from View RetroPay Status.	In both cases: Navigate to the Element window and ensure that the Default Component check box is checked. The United States has one component only (RetroPay) and one reprocess type (Reprocess) - you must check the Default Component check box for the element.
RetroPay Element field is missing when Enhanced RetroPay is enabled.	This is intended behavior. The RetroPay Element field is hidden when Enhanced RetroPay is enabled. You now add your RetroPay elements from the Retro Components button available from the Recalculation tab of the Elements window.
How do I know whether Enhanced RetroPay is enabled for my legislation?	System Administrators can run the following SQL code to determine whether Enhanced RetroPay is enabled. select * from pay_legislation_rules where rule_type like '%ADVANCED% RETRO%' and legislation_code = 'xx'; (Where "xx" is your legislation code). If the SQL query returns a rule mode of Y, then Enhanced RetroPay is enabled for your legislation.

Troubleshooting Earlier Versions of RetroPay

Problem Description	What To Do
RetroPay process element entry not generated for one or more assignments.	Check that the element links exist, then check your RetroPay setup., page 4-38

Problem Description	What To Do
Unexpected value returned.	Check your RetroPay setup., page 4-39
Start and end times ignored.	Check for a previous RetroPay run that overlaps with your current run. If there is an overlap, rerun a new RetroPay with dates that fully include the period processed by the earlier RetroPay.
RetroPay Warning: *Process Log shows zero employees in error - did not create element entries for processed employees.*	Check that you are using the correct balance in the RetroPay set. If you are processing RetroPay within a single calendar year, choose a balance that represents gross pay for year to date. If your RetroPay spans two years, do not select a balance with the _YTD dimension.
Cannot use the Element Entries window to delete RetroPay generated elements.	Roll back the RetroPay process, remove the unwanted assignments from the assignment set and then rerun RetroPay. **Note:** The RetroPay process does not permit use of the Element Entries window to make these changes. This is expected behavior rather than an error.
RetroPay Error: *APP-6370 Cannot create an entry past the termination rule date.*	The setup of your RetroPay element (specifically, the termination rule) does not enable you to process terminated employees. Remove the assignments of terminated employees from your assignment set and then rerun RetroPay.

Detailed Problem Resolutions

This section provides step-by-step solutions for more complex problems.

Check that the Element Links Exist, and then Check Your RetroPay Setup

If the RetroPay process does not generate a RetroPay element for one or more assignments, follow this sequence to correct the problem,:

1. Check that there is a valid, current element link for each assignment in the RetroPay set. If the links do not exist, the RetroPay process can still calculate a retro-payment but cannot attribute the calculation results to an assignment.

2. Check that RetroPay entries exist for this assignment. Do this by inspecting the log file for the HR_HRPROC_EE_NOT_CRE message and searching for the text *Warning RetroPay has detected no change*. This text indicates that RetroPay entries do not exist. There are no differences between the original payroll run and the RetroPay run.

3. Check that your RetroPay setup correctly defines all the required balances. The RetroPay process always uses a balance to track the difference between an original entry and a retro entry. If retro-payments do not specifically feed your RetroPay balances, then the RetroPay process cannot identify that a retro-payment has occurred.

   Example (from U.K. Payroll)

   If you specify an NI balance in your RetroPay setup and then make changes to element entries that are not subject to tax or NI, your run results will be different when you compare the original run and the retro-paid run. However, the RetroPay element does not include these changes because it can only report on those differences that affect the NI balance.

4. Confirm that your RetroPay element has a classification of Earnings. The Earnings classification ensures that you can pay the amounts identified by the RetroPay process. Other classifications, such as Information, do not allow you to make payments.

5. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you could see unexpected results if you are using _YTD balances. Errors occur because the payroll run clears the_YTD balance at the end of year in preparation for the next year.

6. Check that there is a correct end date for the payment of RetroPay entries. Do this by View | Lists | Employees by Element to see whether the entry was created for an unexpected period. If this is the case, set the end date to the first date of the payroll period in which the RetroPay entry should be paid. For example, if you run RetroPay for June to September 2004 to pay back pay in October 2004, your start date should be 01-JUN-2005 and your end date 01-OCT-2005.

Check Your RetroPay Setup

If the RetroPay process returns an unexpected value follow this sequence to correct the problem,:

1. Check the logic of the RetroPay setup to determine that you are feeding the correct balance and confirm that you are not feeding the correct balance more than once.

2. Find out whether your RetroPay definition includes any Year to Date (_YTD) balances. If you run a RetroPay process that spans the end of year, you may see unexpected results if you are using _YTD balances. Errors occur because the payroll

run clears the_YTD balance at the end of year in preparation for the next year.

3. Establish whether there are changes elsewhere in the application that might impact the value of a balance. This can be a difficult area to identify because anything that feeds the balance specified in the RetroPay definition can potentially affect the RetroPay.

   In particular:

   - Balances like Gross Pay can reflect multiple changes to an assignment. These changes can affect the recalculated value of that assignment.

   - Generic changes such as updates to a formula can affects the results of associated elements, and introduce balance value changes that subsequently affect RetroPay values.

China Statutory Deductions Retro Processing

Enhanced RetroPay is the recommended way of processing retrospective calculations for China. Oracle HRMS enables you to retro process Tax and Public Housing Fund/Social Insurances deductions in the retrospective period or in the current payroll period.

The tax area and the contribution area determine an employee's taxation exemption amount and the method for processing PHF and SI calculations. Oracle enables you to define tax areas and set up retro processing style for each tax area at the business group level. You can use the Retro Component Usages window to define the retro processing style for each tax area.

- **Tax when earned**

  You can use the Tax When Earned method to process differential earnings as if you paid them in the retro period. The application carries forward the difference in Tax, Public Housing Fund, and Social Insurance deductions (if any) into the current payroll period along with the differential earning. The application does not calculate tax, public housing fund, and social insurance deductions for the differential earnings in the current month.

  You can also use the Tax When Earned method to process retroactive update on Tax, Public Housing Fund, and Social Insurance management. The application carries forward the difference into the current payroll period.

- **Tax when paid**

  You can use the Tax When Paid method to process the differential earnings within the current payroll period. The application adds the differences to the monthly earnings for the current period and processes to calculate Tax, Public Housing Fund, and Social Insurance deduction for the combined sum.

- **PHFSI When Earned and Tax When Paid**

  You can use this method to process retrospective calculation of PHF/SIs contribution in the original period and the tax calculations in the current period.

  When employees are hired, the PHF/SI contribution is not calculated and deducted from earnings for the first few periods, and therefore must be processed retrospectively in the subsequent pay periods. To enable this Oracle supports retrospective calculation of PHF/SIs contribution in tax when earned mode and tax calculation in tax when paid mode.

  If user-defined earnings elements are taken into consideration for PHF/SI contribution bases' calculation, if for a contribution area, the bases are recalculated every month, the retro elements are set up without the secondary classification (balance feed control) of PHF/SI Constituents; if for a contribution area, the bases are recalculated once in a year, users need to manually feed the retro elements to the PHFSI Constituents for Retro Elements balance. For any user-defined elements, if you would like to use this retro component to process retroactive changes, you must link the retro elements with the base elements by attaching the new retro component - PHFSI When Earned Tax When Paid to the base elements.

For information on how to set up RetroPay processing, see: Setting Up Retro-Notification and RetroPay, page 4-45

You may processes the PHF/SI deductions for an employee using the contribution base. The contribution base may depend on an employee's:

- current month salary
- previous month salary
- monthly average salary of the previous year

See: Setting Up Contribution Area Base Rules., page 4-13

For information on how to set up and enter the contribution area rates or fixed contribution amounts, see: Setting Up Contribution Area Rates, page 4-12

Predefined Event Group: CN Retro Event Group

Oracle provides an Event Group CN Retro Event Group to identify the specific type of retrospective events that require the reprocessing of a payroll. The application comes with predefined PHF/SI Information elements attached to this event group to identify the retrospective changes within the Retro-Notification Report. To process your user-defined elements, attach them to the predefined CN Retro Event Group.

For information on how Enhanced RetroPay functionality works in China, see: *White Paper on Enhanced RetroPay in China on My Oracle Support Note ID 414426.1*.

Business Group: Setting Up Retro Component Usages

Oracle enables you to define tax areas and set up retro processing style for each tax area at the business group level. You can use the Retro Component Usages window to define the retro processing style for each tax area.

To set up Retro Component Usages:

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose Others, and select Retro Component Usages.

2. Click in a field of the Additional Organization Information window to open the Retro Component Usages window.

3. Select the tax area for which you want to set the retro style.

4. Select the applicable retro style.

5. Enter the effective start date.

6. Optionally enter the effective end date.

7. Click OK.

Setting Up Retro-Notification and RetroPay

Follow this process to set up the Retro-Notifications report, and the correct RetroPay process for your payroll.

1. **Set Up the RetroPay Component**

   The RetroPay component determines the default style of RetroPay processing for your localization. For example, you can specify that your default style is Tax When Paid, rather than Tax When Earned .

   > **Note:** The Tax When Paid Retro Style is available for China localization users only.

   You can use either of the following methods to set up your RetroPay component:

Method	How To	Advantages
Set Up the Organization DFF	From the Additional Organizational Information window: 1. Select Retro Component Usages. 2. Select the Tax Area. 3. Enter a Retro Style, for example, Tax When Paid. 4. Enter an Effective Start Date. 5. Enter an Effective Date. 6. Choose OK to confirm your choices.	Processing the retrospective payments for all employees in the same style is a faster alternative than setting up details at the element level for each assignment. This method does not prevent you from making changes for individual assignments when you view RetroPay status.

Method	How To	Advantages
Set Up Retro Components and Spans at Element Level	From the Element window: 1. Query the element. 2. Choose the Recalculation tab. South African users: Select the predefined ZA Statutory Updates event group from the list of values in the Recalculation Events field. Alternatively, you can create and attach an event group of your choice. 3. Choose the Retro Components button. **Important:** Do not enable the Retro Component of the elements that are themselves being used to process retropay for another element. 4. Select a Recalculation Reason. 5. Select a Reprocess Type. 6. Select an Element Span to indicate the start date and end date on which you want to report.	You can modify entries at element level to make exceptions for particular assignments.

Note: Your localization may advocate one of these as the preferred method.

2. **Set Up the Retro-Notifications Report**

   Determine whether a retrospective change in Oracle Payroll will appear in the Retro-Notifications report. Set up an event group to contain all the retrospective change events that you want to record.

   See: Setting Up the Retro-Notifications Report, page 4-45

3. **Set Up Your RetroPay Process**

   Although Enhanced RetroPay is the recommended RetroPay process for most localizations, your System Administrator can also set up these earlier versions of RetroPay.

   See: Setting Up RetroPay by Element, page 4-47

   See: Setting Up RetroPay by Run and RetroPay (by Aggregate), page 4-47

Setting Up the Retro-Notifications Report

You use the Retro-Notifications report to identify any changes that have a retrospective effect for payrolls that you have already run. You can define the relevant types of change by setting up an event group to specify the changes. Follow these steps to set up the Retro-Notifications report:

To enable dynamic triggers:

1. Navigate to the Dynamic Triggers window.

2. Enable any dynamic triggers that the application generates. It is important to enable these triggers to ensure your payroll processing updates each database table correctly. The recommended minimum list of triggers to enable for the Retro-Notifications report is as follows:

Table Name	Trigger Type
PAY_ELEMENT_ENTRY_VALUES_F	Update
PAY_ELEMENT_ENTRIES_F	Update
PAY_ELEMENT_ENTRIES_F	Insert
PAY_ELEMENT_ENTRIES_F	Delete

To define an event group:

1. Navigate to the Table Event Group window.

2. Enter a name for your Event Group, for example, Retro-Notification Events.

3. Select Retro as your event groups type.

4. Save your entries.

5. Select the events that will produce notification if retrospective changes occur. Specify the following information to identify the type of update and the database table to which it applies:

   - Update Type
   - Base Table Name
   - Column Name

   For example:

Update Type	Table	Column Name
DateTrack Correction	PAY_ELEMENT_ENTRY_VALUES_F	SCREEN_ENTRY_VALUE
DateTrack Update	PAY_ELEMENT_ENTRIES_F	EFFECTIVE_START_DATE
DateTrack Update	PAY_ELEMENT_ENTRIES_F	EFFECTIVE_END_DATE
DateTrack End Date	PAY_ELEMENT_ENTRIES_F	
DateTrack Insert	PAY_ELEMENT_ENTRIES_F	
DateTrack Delete	PAY_ELEMENT_ENTRIES_F	

To enable the Incident Register:

1. Navigate to the Functional Area Maintenance window.

2. Query the Incident Register and ensure that you have triggers defined.

3. Decide whether to capture the triggers by legislation, business group, or payroll.

Navigate to each tab to make your selection.

Setting Up RetroPay by Element

RetroPay by Element is the recommended RetroPay process for most localizations, and is required if you use Enhanced RetroPay.

To set up RetroPay by Element:

1. Create the retroactive element. The recommended settings are:

   - Non-recurring
   - Multiple entries allowed

   View this element in the RetroPay field of the Element Description window. By default, retroactive elements use the same name as the element that they represent, but you can change this name for user-defined elements.

2. Enter retroactive changes using DateTrack.

3. Create assignment and element sets including the assignments and elements for retroactive processing. The element set type is Run Set.

   Note: North American HRMS: For earnings elements defined as Reduce Regular, include the Special Features element in the element set.

   Use one of two methods to create your assignment set:

   - Use the Assignment Set window. This method is useful when you have a few employees to include in a RetroPay run and you are confident that you can identify all the employees that you want to include.

   See: Creating an Assignment Set, *Oracle HRMS Payroll Processing Management Guide*

   - Run the Retro-Notifications report to automatically generate an assignment set of all employees with retrospective changes.. This method is useful if you want to be certain that your assignment set includes all potential changes. You can edit this assignment set to add and remove assignments.

   See: Running the Retro-Notifications Report, page 4-61

Setting Up RetroPay by Run and RetroPay (by Aggregate)

You should consider setting up Enhanced RetroPay in preference to RetroPay by Run or RetroPay (by Aggregate). However, we include setup information on these older types

of RetroPay as reference.

To set up the RetroPay process for RetroPay (by Aggregate) and RetroPay by Run:

Each step applies to both RetroPay (by Aggregate) and RetroPay by Run unless explicitly indicated otherwise.

1. Create an assignment set to define the set of employee assignments that you want to change. There are two methods of doing this:

   - Use the Assignment Set window. This method is useful when you have a few employees to include in a RetroPay run and you are confident that you can identify all the employees that you want to include.

   See: Assignment Sets, *Oracle HRMS Payroll Processing Management Guide*

   - Run the Retro-Notifications report to automatically generate an assignment set of all employees with retrospective changes. This method is useful if you want to be certain that your assignment set includes all potential changes. You can edit this assignment set to add and remove assignments.

   See: Running the Retro-Notifications Report, page 4-61

2. In the Element Entries window, make the necessary date effective updates to element entry values for each employee assignment in the set.

   See: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

3. Make other changes if necessary to salary information or to other database values relevant to the backdated changes.

4. In the Element window, define the RetroPay elements you require to receive entries of the retroactive adjustments. Your definition must include the following:

   - An appropriate element classification such as Earnings or Voluntary Deduction (not Information)
   - The processing type Nonrecurring
   - The rule Multiple Entries Allowed
   - Input values with these names:
     - Pay value
     - Start date (not necessary for RetroPay by Run)
     - End date (not necessary for RetroPay by Run)

See: Defining an Element (Payroll Users), *Oracle HRMS Compensation and Benefits Management Guide*

5. In the Element Link window, link the element to define your eligibility criteria.

   See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

To create a RetroPay set:

1. In the RetroPay Set window, enter a name and a description for the RetroPay set you are creating. Save this information before moving to the next block.

2. Select the balance in which the RetroPay process will create new values, such as Gross Pay to Date. You can select more than one balance. However, for RetroPay by Run the balance dimension must always be ASG_RETRO_RUN.

   For RetroPay (by Aggregate), if you plan to run the process over several past payroll periods, check that you are not going through an end of year or similar period where the application resets balance totals to zero. If necessary, adjust the balance dimension span to ITD.

3. Select the RetroPay element you have defined to receive the values of the updated balance.

4. Select an input value for the element. Normally this value is Pay Value, but you can also calculate RetroPay hours by including an Hours input value.

Setting Up Enhanced RetroPay with Component Usages and Element Time Spans

Standard RetroPay is the default RetroPay processing method for the Netherlands. It enables you to deal with any earnings changes made in the previous or current year, and any changes to tax and social insurance, impacting payroll calculations made in the current year. To carry out RetroPay processing, for every earnings element defined, you must set up two RetroPay elements, both with the skip rule Once Each Period assigned. These elements require the primary classifications Earnings, for changes in the previous year, and Retro Earnings, for changes in the current year. The same rule applies to imputed elements with the classifications Imputed Earnings and Retro Imputed Earnings. You set up RetroPay component usages to define how RetroPay will process the component. For each of these components you define an element time span to specify the start and end dates of the retro processing, and which RetroPay element applies for each time span.

Note: Each RetroPay element you create must have the skip rule, Once

Each Period, assigned to it. Users in the Netherlands select a particular RetroPay method by running the concurrent program Enable Dutch RetroPay Method and selecting, either standard or replacement. The default entry is standard.

Only add assignments requiring RetroPay processing to the RetroPay set. The RetroPay process posts retro entries for each of the assignments in the RetroPay set. Note that these retro entries always include any changes to tax and SI information, even if there are no retrospective earnings entries.

Each pre-tax or pre_si and pre-tax deductions element processed by RetroPay must have a corresponding RetroPay element with a primary classification of Retro Pre-Tax Deduction or Retro Pre-SI and Pre-Tax Deduction. You must also define a RetroPay Component Usage and an Element Span Usage for the original element for each RetroPay method used, whether Standard or Replacement. All earnings elements require a corresponding RetroPay element and link.

For further information on the methods of RetroPay available for the Netherlands, see: RetroPay for the Netherlands, *Oracle HRMS Payroll Processing Management Guide*.

For further information on how to enable your RetroPay method of choice, see:Enabling the Method of RetroPay, *Oracle HRMS Payroll Processing Management Guide*.

For further information on how to override the Replacement RetroPay method for the Netherlands, see: Business Groups: Entering Dutch Business Group Information, *Oracle HRMS Enterprise and Workforce Management Guide*.

Important: If you do not require the Replacement method of RetroPay, you do not have to enable the Standard method, as it is the default method.

Defining Retropay Earnings Elements:

You enter element information in the Element window.

An example of defining an earnings element for Netherlands payroll appears in the notes below.

1. Define your salary element with the primary classification of Earnings.

2. Choose the Balance Feeds Control button. In the Balance Feed Control region select the appropriate element classifications from the list of values.

   Note: Netherlands users, for example, select the classifications SI Income Subject to Standard Tax: Earnings and Subject to Standard

Tax: Earnings.

3. Choose the Balance Feeds button to view the resulting balances feeding the element.

   Note: You must now set up two retropay elements with the skip rule Once Each Period assigned.

4. Define the retropay element for the previous salary year, with the primary classification Earnings.

   Note: Netherlands users, in the Processing region, click on the Skip Rule and select NL_ONCE_EACH_PERIOD from the menu.

5. Choose the Balance Feeds Control button. In the Balance Feed Control region select the appropriate element classifications from the list of values. Retropay elements for the previous year that are subject to tax must always be subclassified as subject to special tax, regardless of the tax category of the original earnings element. If an original earnings element is subject to standard tax, then the retropay element must be subject to special tax. This includes SI Income and SI Gross Salary elements that are subject to tax.

   Note: Netherlands users, for example, select the classifications SI Income Subject to Special Tax: Earnings and Subject to Special Tax: Earnings.

6. Choose the Balance Feeds button to view the resulting balances feeding the element.

7. Save your work.

8. Define the retropay element for the current salary year, with the primary classification of Retro Earnings.

   Note: Netherlands users, in the Processing region, click on the Skip Rule and select NL_ONCE_EACH_PERIOD from the menu.

9. Choose the Balance Feeds Control button. In the Balance Feed Control region select the appropriate element classifications from the list of values. Retropay elements for the current year, subject to tax, must always be subclassified the same as the tax category of the original earnings element. If an original earnings element is subject

to standard tax, then the retropay element must be subject to standard tax also. This includes SI Income and SI Gross Salary elements that are subject to tax.

> **Note:** Netherlands users, for example, select the classifications SI Income Subject to Standard Tax: Earnings and Subject to Standard Tax: Earnings.

10. Choose the Balance Feeds button to view the resulting balances feeding the element.
11. Save your work.
12. You can now set up your retropay components and element span usages.

Setting Up Retropay Component Usages:

Retropay component usages assign the components to the salary elements you created, ensuring all the elements recalculate with the latest values.

1. Query your defined salary element, in the Element window.
2. Select the Recalculation tab, and check the Retro Components button.
3. In the Retropay Components region of the Retropay Element window, choose the component field, and an appropriate component from the list of values.

   > **Note:** Netherlands users select the Retro Component Standard, or Replacement as required.

4. Select the Reprocess Type. If you select Static, then Retropay will not process any changes to the element when running the relevant component. Opting for the Reprocess Type ensures the element changes process.

   > **Note:** Netherlands users select the Reprocess Type, Reprocess. Dutch Retropay processes the period of change, and not the nature of change, such as a correction or backdated change. As a result, the whole retro period reprocesses.

5. Save your work.
6. You can now enter the element time spans.

Example of a standard retropay component set up for an earnings element

Element	Component Name	Reprocess Type	Comments
User Defined Element	Standard	Reprocess	Retro Earnings

Example of a replacement retropay component set up for an earnings element

Element	Component Name	Reprocess Type	Replace Run	Use Override Dates
User Defined Element	Replacement	Reprocess	Yes	Yes

Setting Up Element Span Usages for Earnings Elements:

The element time span usages defines the start and end dates for retropay processing. Most elements have the standard time span of Start of Current Year to End of Time already assigned, to cover any changes made in the current year. The exceptions for the Netherlands are standard taxable income and standard tax deduction, which include the timescales Start of Current Year to End of Previous Quarter, and Start of Current Quarter to End of Time, to cover student taxation. For each earnings element, or imputed earnings element with a defined retropay component usage, you must define two element span usages. These element span usages cover the earnings for both the current and the previous year, defining not only how far back processing should cover, but also up to where a particular retropay element carries forward the retro changes. You must define your retropay elements and components before defining the element time spans.

Set up the Element Span Usages in the Retropay Elements window.

1. Query your defined salary element in the Element window.
2. Select the Recalculation tab, and check the Retro Components button.
3. In the Retropay Elements region, select the appropriate time spans from the From and To fields, to define the time period the retropay element is covering.

   Note: In the Time Spans fields, for each earnings element or imputed earnings element with a standard retropay component usage defined, you must define the element span usages for both

the current and previous years. For example, for the retropay element, Retro Salary Previous Year, you define the time span from Start of Time to End of Previous Year. For each earnings, or imputed earnings element with a replacement retropay component defined, you must define the element span usage for the current year. You can set up a second time span to cover the previous year, if required.

4. Select the retropay elements you created from the Retropay Element field.

5. Save your work.

Example of earnings element span definitions for both standard and replacement components

Element	Component	Span From	Span To	Retropay Element
User Defined Element	Standard	Start of Time	End of Previous Year	Retro Earnings Previous Year
User Defined Element	Standard	Start of Current Year	End of Time	Retro Earnings Current Year
User Defined Element	Replacement	Start of Current Year	End of Time	Retro Earnings Current Year
User Defined Element	Replacement	Start of Time	End of Previous Year	Retro Earnings Previous Year

Setting Up Overlapping RetroPay Using Balance Adjustments

If you have overlapping periods for making retro payments, ensure that the Retro Overlap feature is enabled. This process recalculates from the latest reprocess date and uses Balance Adjustments. Follow these steps to set up the Retro Overlap feature :

To set up Retro Overlap using Balance Adjustments:

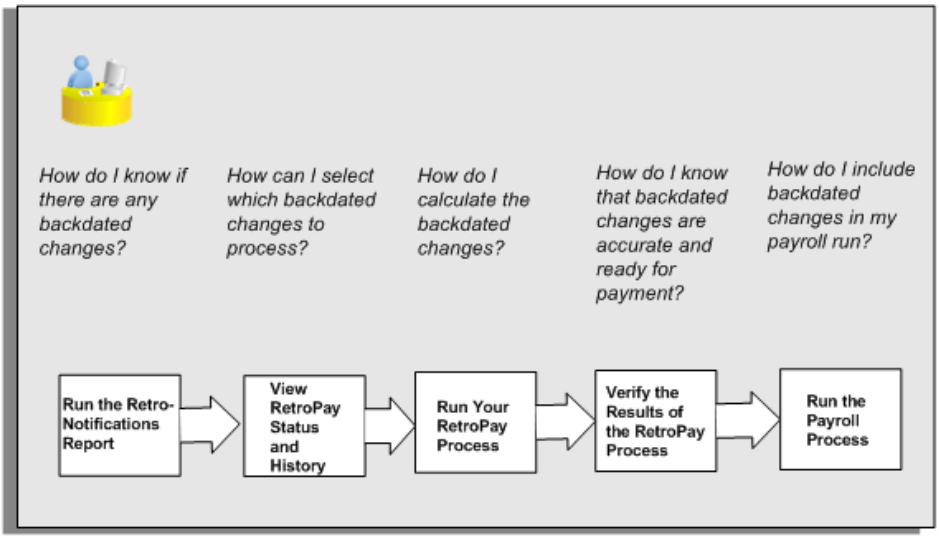
1. Run the corresponding concurrent program to enable the retro overlap feature for your localization, for e.g. Enable Retro Overlap for all UK Business Group.

2. Set up all the Retro Element Types and associate them with their corresponding elements.

3. Define a retro element for every element that feeds a balance. The Balance Adjustment process uses the retro entries created in future periods to do adjustments.

4. Enable the 'Do Not Process' check box for any new retro elements used for retro balance adjustments.

Understanding the Sequence of Your RetroPay Activities



Follow this sequence to:

1. Identify outstanding backdated adjustments

2. Monitor and control the processing of backdated adjustments

3. Include backdated adjustments in your next payroll run.

You can only run the Retro-Notifications report and view RetroPay status if you are using RetroPay by Element, or the version of RetroPay by Element sometimes referred to as Advanced or Enhanced RetroPay.

This sequence does not apply to RetroPay by Run and RetroPay (by Aggregate)

1. **Run the Retro-Notifications Report**

   Run the Retro-Notifications report to identify any backdated changes that have not been included in a payroll run.

   You can save your summary of backdated changes into either an assignment set or an event group.

   Once you have identified the retrospective changes, you can then decide whether to include them in your RetroPay process.

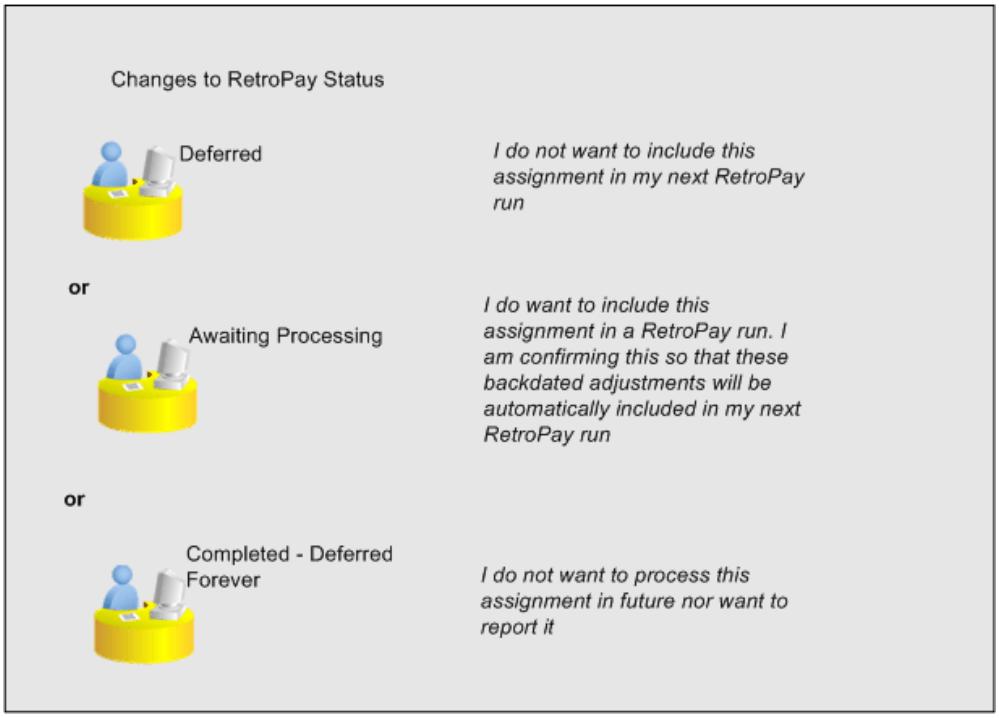
The Enhanced Retro-Notifications report uses the Payroll Events Model to identify what changes have occurred to your underlying data. If these changes correspond to the retrospective types of change that you want to be notified about, then these changes appear on the Retro-Notifications report.

See: Setting Up Retro-Notification and RetroPay, page 4-42

See: Running the Retro-Notifications Report, page 4-61

2. **View RetroPay Status and History**

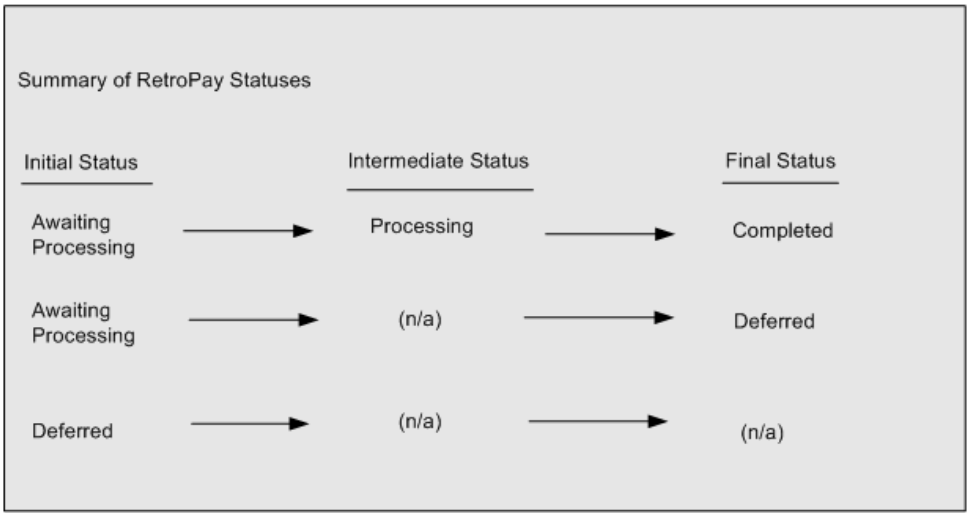
Once you have identified unprocessed retrospective payments, you can determine how you want to process these changes.



The Retro-Notifications report identifies the assignments with backdated adjustments. If you defer, then the assignment is not included when you next run RetroPay.

You can also include additional assignments that the Retro-Notifications report did not identify. This typically occurs when you discover additional backdated adjustments that were not known about when you ran the Retro-Notifications report.

The following diagram shows the sequence of statuses for each RetroPay status:



Once RetroPay processing begins, the initial status changes to an intermediate status of Processing.

You can query all retro assignments that are at the initial (outstanding) status, and all retro assignments at the final (completed) status.

The following diagram shows what statuses are included when your query All Outstanding, and All Completed:

See: Viewing RetroPay Status and History, page 4-58

3. **Run the RetroPay Process**

   You enable Oracle Payroll to make retrospective adjustments for the combination of changes identified on the Retro-Notifications report, and subsequently modified when viewing RetroPay status.

   See: Running Enhanced RetroPay, page 4-64

See: Running RetroPay by Element, page 4-64

RetroPay by Element already enables you to distribute retrospective payments across individual elements.

Example

If you have Enhanced RetroPay you can decide whether each retrospective payment requires:

- A full reprocessing in which you recalculate all amounts for the current payroll. This option is typical when you are processing backdated payments, or when you want to deduct tax for backdated amounts in the period when it was earned, rather than in the current payroll period.

- A limited reprocessing in which you recalculate only some of the amounts for the current payroll. This option is typical when you are processing corrections, or when you want to deduct tax for retrospective changes in the current payroll period rather than in the period when it was earned.

Components for RetroPay

Oracle Payroll describes each different type of Enhanced RetroPay run as a component. For example, you could set up a component *Earnings Correction* for the element *Basic Salary*. A component always has:

- A name (for example, Earnings Correction)

- A reprocess type (Static, Partial, Reprocess) to determine how to process the component

Element Spans for RetroPay

You can also attach element spans to your selected element. An element span provides a start and end date for retrospective processing.

See Setting Up Retro-Notification and RetroPay, page 4-42

4. **Verify Your RetroPay Results**

   When you have run the RetroPay process, verify your results and correct any errors.

5. **Run Your Payroll**

   Finally, run your payroll to reflect the adjustments that you have made for the retrospective payments.

Viewing RetroPay Status and History

You use the RetroPay Status window to control how you want to process changes that have a retrospective impact. You typically find outstanding retrospective changes where changes are entered in Self-Service HRMS independently of Oracle Payroll.

Use the RetroPay Status window to:

- Identify any assignments that have changes implying retrospective processing.
- Specify how you would like to process any outstanding retrospective changes.
- Confirm that your application has processed the specified requests.
- Create or update multiple retro assignments for status as Awaiting Processing or Deferred.

You can still use the Retro-Notifications report to identify all outstanding retrospective changes that have not been applied, and group them into an assignment set ready for processing.

See: Running the Retro-Notifications Report, page 4-61

However, the advantage of using the RetroPay Status window is that you can identify what you want to process, or exclude from processing, and then mark your selections for completion. Additionally if you have to create or update multiple retro assignments, you can do so using the Web ADI spreadsheet.

To search for assignments that have retrospective changes:

1. Select the search criteria for assignments that you want to view. If you do not select any criteria, then your search returns all assignments that have retrospective changes. You can search for any of these criteria:

   Name: Specify a name, or search for all names.

   Assignment Number: Specify an assignment or search for all assignments.

   Recalculation Date: Use this start date and end date to determine the period for retrospective changes.

   Status: Select the status that you want to identify.

   - All Completed. This status displays all assignments with retrospective implications that are already processed.
   - All Outstanding. This status displays all assignments with retrospective implications that are not yet processed.
   - Awaiting Processing. This status indicates that this assignment has cleared for processing and that the processing will occur in the next payroll run.
   - Completed. This status indicates that this assignment has now been processed.
   - Completed – Deferred Forever. This status indicates that the retro assignments created by the system are deferred forever. The action of the retro assignment (RETRO_ASSIGNMENT_ACTION_ID) is to changed to –1. The retro

assignments are not processed in the future nor reported with the new status.

- Deferred. This status indicates that an assignment was scheduled for processing, but that the processing was deferred and will not occur until you change the status.

- Processing. This status indicates that an assignment is being processed.

Recalculation Reason: This criterion indicates why retrospective processing is necessary and enables you to search particular categories of retrospective change to process them independently of other retrospective changes.

2. Click Go when you have selected all your search criteria.

To change the status of an assignment:

You typically change the status of an assignment when you want to defer processing that was previously scheduled, or to indicate that you have already processed this change even though it was automatically scheduled.

1. Select the assignment that you want to change.

2. Select the new status for the assignment from the Change Status list of values.

3. Click Change Status.

To view the elements included on each assignment:

1. Select the assignment name in the Name column.

2. View the elements for this assignment, and the Recalculation Reason for each element.

To update or delete elements for each assignment:

1. Select the assignment name.

2. Click Update to add an element to the assignment.

3. Click Delete to remove an element from the assignment.

To confirm that your specified requests have been processed:

1. Query the individual assignment, but leave the status field blank.

2. Alternatively, query all assignments with a status of All Completed or All Outstanding and check the details for your individual assignment.

To create multiple retro lines:

1. Select the Create Retro Lines button.
2. A spreadsheet opens.
3. In the spreadsheet that appears, enter new records with a status of Awaiting Processing or Deferred.
4. Click on Upload. You can select Commit All Rows or Each Row option, if you want the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

   If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

To update the multiple retro lines:

1. Query the assignments with Awaiting Processing or Deferred.
2. Click on Download to Spreadsheet check box and click Go
3. In the spreadsheet that opens, you can update the status. You cannot modify any employee or assignment information but can only change the status of the assignment or you can delete the retro entry or update the reprocess date of the retro entry.

   Note: In the Entry Delete/ Update column, ensure to select the applicable value if there are any entry changes made. If you do not select any value the application does not make any changes to the database.

4. Click on Upload. You can select Commit All Rows or Each Row option, if you want the application to validate all records and commit or validate each record prior to uploading the details to the database. If you select the Each Row option, then all successful records will be uploaded and error records will not be uploaded. Only on successful validation, the application makes changes to the database.

   If you select the Upload All Rows or Each Row, then the application does not validate the details prior to uploading.

Running the Retro-Notifications Report

Use the Retro-Notifications report to

- Identify all retrospective changes that have occurred since the last payroll run.
- Automatically save these changes into an assignment set or as an event, depending on which Retro-Notifications report that you use in your localization.
- Produce a report that lists the employees included in the assignment set and the trigger event that included them. You can view this output through Concurrent Manager by clicking the View Output button. Your reporting output is stored under the title Retro-Notifications Report (Internal).

Retro-Notification information is particularly useful when changes with retrospective impact are entered in Self Service HRMS independently of the Payroll department.

The Retro-Notifications report does not perform any RetroPay processing. It only identifies element entries that have changed. You must still run your RetroPay process separately to process these changes. When you produce the assignment set, or event group, you can decide whether to:

- Run your RetroPay process on all assignments in this assignment set.
- Edit the assignment set or event group to remove or add assignments, and then run your RetroPay process.
- Take no retrospective action on any of the assignments in the assignment set.

You can use the RetroPay Status window to schedule automatic processing.

You run the Retro-Notifications report from the Submit Processes and Reports window.

To run the Retro-Notifications report:

1. Select Retro-Notifications report in the Name field. If the parameters window does not open automatically, click in the Parameters field to open it.
2. Select the payroll. You can only run this report for a single payroll.
3. Select the last Report Period that you want to run the report for. The List of Values contains all periods for your selected payroll. The report runs for all periods up to and including the one you select.
4. Select an Event Group for the report to use. You can only run this report for a single event group. A default event group captures changes made at element level, but you can override the default, if, for example, you are testing your initial setup.
5. Enter the name of the Assignment Set that you want the report to generate. You can use this assignment set as a starting point for further processing of the assignments identified in the report.

Note: The assignment set name generated by the report will include what you enter in the Generated Assignment Set field followed by the Report ID.

6. If you want to produce this report in Portable Document Format, (PDF), select a template.

7. Select OK and Submit.

   When you have generated the assignment set remember to run your RetroPay process for those retrospective changes that you want to process. You can either run your RetroPay process directly or, if your RetroPay process is RetroPay by Element, or Enhanced RetroPay you can use the RetroPay Status window to schedule your processing.

Running the Retro-Notifications Report (Enhanced and Enhanced PDF)

Use this report to

- Identify all retrospective changes that have occurred since the last payroll run.
- Automatically save these changes into an assignment set, or as an event, depending on which Retro-Notifications report you use in your localization.
- Produce a report (.a01) that lists the employees included in the assignment set and the trigger event that included them. You can view this output through Concurrent Manager by choosing the View Output button.

This information is particularly useful when changes with retrospective impact are entered in Self Service HRMS independently of the Payroll department.

The Retro-Notifications report does not perform any RetroPay processing. It only identifies element entries that have changed. You must still run your RetroPay process separately to process these changes. When you produce the assignment set, or event group, you can decide whether to:

- Run your RetroPay process on all assignments in this assignment set.
- Edit the assignment set or event group to remove or add assignments and then run your RetroPay process.
- Take no retrospective action on any of the assignments in the assignment set.

You can use the RetroPay Status window to schedule automatic processing.

You run the Retro-Notifications (Enhanced) report from the Submit Processes and Reports window.

To run the Retro-Notifications (Enhanced) report:

1. Select the payroll. You can only run this report for a single payroll
2. If you want to see the retro-notifications for a particular event group, select an overriding event group.
3. If you are running the PDF-enabled version of this report, select a template for your PDF output.
4. Select OK, and submit.

Running Enhanced RetroPay

Use the Enhanced RetroPay process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

You run the Enhanced RetroPay process from the Submit Requests window.

To run the Enhanced RetroPay process:

1. Enter an effective date to indicate the date from which you want to create the retrospective elements for Enhanced RetroPay process.
2. Select the payroll.
3. If you want to create retrospective entries in a different pay period other than effective date, enter an entry creation date. The application creates retrospective entries in the pay period in which the Entry Creation Date occurs.

   If you leave this field blank, the application creates the default retrospective entries as of Effective Date.
4. Click Submit

Running RetroPay by Element

Use the RetroPay by Element process to distribute backdated amounts or corrections that you have identified from the Retro-Notifications report.

You run the RetroPay by Element process from the Submit Requests window.

To run the RetroPay by Element process:

1. Select an assignment set.
2. Select an element set.

3. Select a start date and end date.

   The end date must be within the current payroll period and must have a date after the latest effective check/cheque date.

4. Click Submit

   Oracle Payroll temporarily rolls back and reprocesses all the payrolls for all assignments included in the assignment set from the start date specified. The application compares the old balance values with the new ones, and creates entry values for the RetroPay elements based on the difference.

   These entries are processed for the assignments in the subsequent payroll run for your current period.

   There are no changes to your audited payroll data.

Running RetroPay by Run or by Aggregate

You run the RetroPay processes in the Submit Requests window.

To run the RetroPay processes:

1. In the Name field, select your RetroPay process.

2. In the Parameters window, select the assignment set.

3. Select the RetroPay set.

4. Enter the start date and end date for the recalculation. The default end date is the current date. The application will create the RetroPay element in the payroll period that includes the current date.

   The end date must be within the current payroll period and must have a date after the latest effective check/cheque date. If you already processed a run for the pay period, for example, because of an earlier supplemental run, you cannot include the RetroPay elements for the current regular payroll run. To process these RetroPay elements you must include them in the subsequent run.

5. Click Submit.

   Oracle Payroll temporarily rolls back and reprocesses all the payrolls for all assignments included in the assignment set from the start date specified. The application compares the old balance values with the new ones and creates entry values for the RetroPay elements based on the difference.

   These entries are processed for the assignments in the subsequent payroll run for your current period.

   There are no changes to your audited payroll data.

Running Quick RetroPay

Run Quick RetroPay to process any retrospective payments for a single assignment. You run the Quick RetroPay process from the Submit Requests window.

> **Note:** It is not mandatory to run the Retro-Notifications Report for QuickRetropay process.

To run the Quick RetroPay process:

1. Enter a date on which you want to create the derived retro element entries. This is mandatory.
2. Select the assignment number of the assignment for which you want to run the backdated change. This is mandatory.
3. Enter an earliest date from which you want to reprocess the assignment backdated changes. If you do not specify any date, then the application calculates it internally. This is optional.
4. If you want the retro-notifications for a particular event group, select an overriding event group.
5. Click Submit.

5

Workforce Sourcing and Deployment

Appointments

Appointments and the Hiring Process

The appointment process takes the applicant from the recruitment process to employee administration where the initial tasks include entering terms and conditions and payroll information.

If you are an Oracle US Federal HRMS user, you use the Request for Personnel Action (RPA) to appoint employees.

If you are using Oracle SSHR, you can use the Candidate Offers functionality to generate offer letters.

Hire Dates and Future-Dated Changes

Oracle HRMS enables you to make future-dated changes to a person's details.

If you make future-dated changes to an applicant's details, such as changing their name, and you subsequently hire the person, the earliest hire date you can enter is the day following the date of the last change. The hire date can, of course, be a future date (providing it is at least 1 day after the date of the last change). For example, if you received an application on January 10th and you changed the applicant's details using future dates, say on January 22nd and February 10th, and you subsequently hire the applicant, the earliest hire date you can enter is February 11th (the date of the **last** change plus one day).

Alternatively, you could hire the applicant (change their person type to Employee), and then make the changes to their details with the status of Employee.

Back-to-Back Employment and Placements

Back-to-back employment and placements occur when a previous period of employment or a previous placement ends 1 day before a new period of employment or a new placement begins.

Oracle HRMS supports back-to-back employment and placements even where there is a difference in person types. That is, an ex-employee can begin a placement on the day following termination of their employment, and an ex-contingent worker can begin employment on the day following the end of their placement.

An ex-employee starting new employment or a placement on April 1st must have an actual termination date **and** a final processing date (for payroll processing) for their previous employment of March 31st. (If your enterprise does not have Oracle Payroll, the final processing date automatically defaults from the actual termination date).

An ex-contingent worker starting employment or a new placement on April 1st must

have an actual termination date of March 31st for their most recent placement.

In both cases, there can be no future-dated changes.

> **Note:** You cannot change the hire date of any back-to-back employment. Instead, you must cancel the employment and rehire the employee.

Earliest Hire Dates

- An applicant's earliest hire date is either 1 day after you accept the application or the day after the last of any future-dated changes, whichever is later.
- An ex-employee's earliest hire date is either 1 day after the final process date for the previous employment or the day after the last of any future-dated changes, whichever is later. For back-to-back employment, the final process date must be the actual termination date, and there can be no future-dated changes.

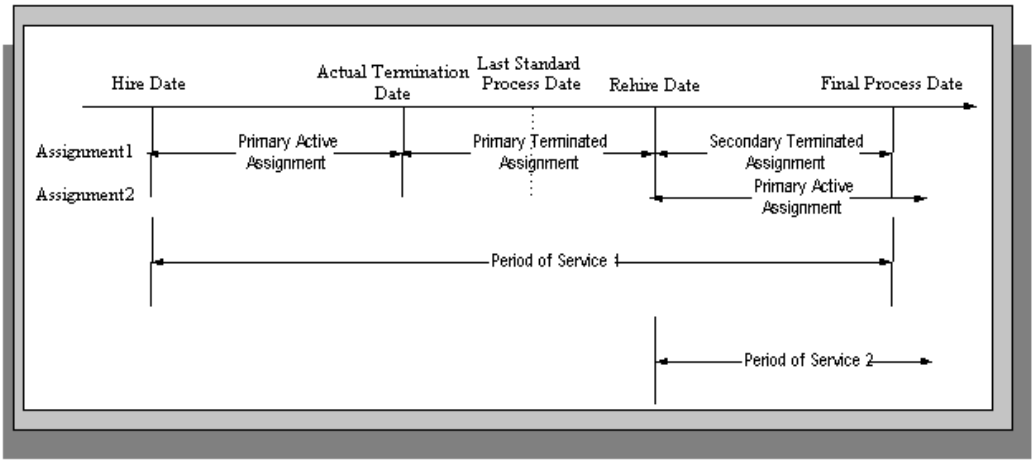
  > **Note:** Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Mexico, New Zealand, Norway, Saudi Arabia, Singapore, South Africa, Russia, UK, US, United Arab Emirates, and International Payroll users can rehire ex-employee before the final process date. See: Rehire Before Final Process Date, page 5-3

- An ex-contingent worker's earliest hire date is either 1 day after the actual termination date of the most recent placement or the day after the last of any future-dated changes, whichever is later. For back-to-back hiring, there can be no future-dated changes.

Rehire before Final Process Date

Australia, Canada, China, Denmark, Hong Kong, India, Ireland, Korea, Kuwait, Norway, Mexico, New Zealand, Saudi Arabia, Singapore, South Africa, Russia, UK, US, United Arab Emirates, and International Payroll Only: To provide greater flexibility in the hiring process, Oracle HRMS enables you to rehire a terminated employee before the Final Process (and after the Last Standard Process) date for their previous period of service.

Rehire before Final Process Date



As illustrated in the diagram, when you complete the rehire, the application changes the existing, terminated assignment into a secondary assignment. The new, active assignment becomes the primary. You can then process payments from both assignments during the overlapping periods of service.

> **Note:** When you cancel the rehire, the application changes the secondary terminated assignment back to a primary terminated assignment. The application however retains the date changes to the primary terminated assignment even after a cancellation. For example, if the actual termination date is 20 April, the final process date is 31 April, and you rehire the person on 25 April, the application updates the primary terminated assignment for the period 21 April to 24 April and creates a new one for the period 25 April to 31 April. If you subsequently cancel the rehire, then the application retains the primary terminated assignment for the period 21 April to 24 April as well as the one for the period 25 April to 31 April.

When you rehire before the final process date, the employee has overlapping periods of service between the rehire date and the final process date. The Terminate window displays the service dates for all the overlapping periods of service. The latest period of service appears by default. You can scroll down to view the earlier periods of service.

Valid Person Types for Applicants

You can convert an applicant to an employee but not to a contingent worker. However, an applicant can become a contingent worker (a Contingent Worker.Applicant) while their application for employment remains active. Subsequently, you can either cancel the application, and allow the contingent worker placement to continue, or end the contingent worker placement prior to hiring the applicant.

People Management

Person Extra Information Types

You can define as many Extra Information Types (EITs) as you require to hold information about people.

There are also some predefined person EITs. The information in these EITs is not datetracked.

> **Note:** To be able to access predefined EITs, you must link them to your responsibility.
>
> See: Setting Up Extra Information Types For a Responsibility, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* .

The predefined person EITs are:

- Foreigner Residence Permit Card Information - the card number, card type, date of issue, authority of issue, and expiration date.
- Other Employee Data - the technical hire date and working life start date.

  > **Note:** Use this EIT if your employee previously worked for your enterprise. The technical hire date is when your employee rejoined service, while the working life start date is when your employee first began working for your enterprise.

- Pass Information - the classification, pass number, pass type, date of issue, authority of issue, and date of expiry. The pass type must be a numeral between 0 and 99.

  > **Note:** Use this EIT if your employee is a resident of Hong Kong, Macao, or Taiwan who wishes to visit mainland China. Alternatively, use this EIT if your employee is a resident of mainland China who wishes to visit Hong Kong, Macao, or Taiwan.

- Passport Information - the category, number, country of issue, place of issue, date of issue, and date of expiry.

  > **Note:** Select Business Usage in the Category field if your employee is a Chinese citizen who has been issued a passport by your enterprise, and your enterprise is a state-owned unit, non-profit body, or government

department. In such cases, your enterprise maintains your employee's passport.

- Personality Information - the personal identity and personal character. The values in both fields are specified by the National Standard Bureau of China.

  Note: This EIT is usually applicable to state-owned units or government departments. The legal retirement age is partially determined by Personal Identity. Use the Personal Character field to describe the backgrounds of your employees before they joined your enterprise.

- Previous Military Service Information - the place of joining, date of joining, approval date of leaving, approval unit for leaving, last position, last rank, last level, last professional title level, last salary grade, and reserve official registration.

- Visa Information - the visa number, visa type, place of issue, country of issue, date of issue, and date of expiry.

  Note: Use this EIT if your employee is an expatriate.

- Work Permit Information - the classification, permit number, permit type, date of issue, authority of issue, and date of expiry. The permit type must be a numeral between 1 and 12.

  Note: Use this EIT if your employee is an expatriate or a resident of Hong Kong, Macao, or Taiwan who wishes to work in mainland China; in such cases, a work permit is required.

- Foreign Travel Detail Information - the departure date, purpose of travel, designation unit name, group or team name, source of funding, approving unit, date of approval, approval file number, projected return date, actual return date, exception reason, and role in the team. The departure date is a mandatory field.

- Foreign Travel Master Information - the departure date, destination country, description of destination, target unit name, and visa number. The departure date and destination country are mandatory fields.

  Note: Use the above two EITs if your employee is travelling abroad to multiple destinations using multiple visas, in a single trip. The first EIT captures all the single record details of the trip, and the second EIT captures the multiple record details of the trip. Both these EITs are

linked through the Departure Date column, which is unique for a given trip.

- Oracle Student System (OSS) Person Details - records OSS identification data for the student employee. The field Synchronize OSS Data controls synchronization of student employee address and telephone information between HRMS and OSS.

Special Information Types

Special Information Types Overview

Basic information is handled in a fairly standard way from enterprise to enterprise. However, other types of information are recorded and used in quite different ways. Examples include training records, disciplinary records, competence records, and medical records. Oracle HRMS does not restrict you to any predefined format for holding this information. You can set up your own user-defined fields for recording, analyzing, and reporting on whatever special information you require.

In Oracle HRMS, you use the *Personal Analysis key flexfield* to define any special information not provided by the main system that you want to hold about people, jobs and positions, and training activities. Alternatively you can define Extra Information Types (EITs) to record this information.

See: Person Extra Information Types, page 5-5

You can define any number of instances of the Personal Analysis key flexfield. Each instance is called a Special Information Type (SIT). For example, you might set up types to hold performance reviews or medical details. You can enter a person's information under these sorts of headings in the Special Information window.

Characteristics of SITs

Each SIT can have up to 30 fields (where each field is a segment of the flexfield). You can set up cross-validation to ensure that users enter correct combinations of segments. You can also speed up data entry and minimize errors by defining aliases for common combinations of segment values.

When you enable SITs for your business group, you select how you plan to use each type. In Oracle Human Resources, you can use them for:

- Job requirements
- Position requirements
- Personal information

In Oracle Training Administration, you can use them for:

- Skills provided by training activities

Each SIT can be used for one or more than one purpose. The options you select control the windows in which each appears.

In Oracle Human Resources, you can also configure the windows that handle SITs to restrict them to just one type, such as medical records. This arrangement is useful if you want to restrict access to particular types of information for security reasons, or to aid users' efficiency by giving them access to just the information they require for a particular task.

Predefined SITs

Oracle Human Resources comes with predefined SITs that enable you to store information on your employee. These SITs are especially useful if your enterprise is a:

- Government department
- State-owned unit
- Public-sector unit

> **Note:** You can set start and end dates for records that you create for each SIT in the Special Information window. However, these dates are not related to the effective date that you set for the system; you can see all records that you create for predefined SITs regardless of your effective date.

The predefined SITs are:

- Cadre Job Details - cadre job class.
- Personal File Details - the file number, archive format, transfer in date, source unit, transfer out date, target unit, store location (original copy), and store location (second copy).
- Political Information - the party type, party status, first and second introducers, place of joining, unit of joining, date of joining, formal membership date, date of exception, type of exception, and reason of exception.
- Rewards and Punishments - the type, name, reason, granting date, granting unit, cancellation situation, and comments.
- Technical Post Details - the technical title, level, way to obtain title, granting authority, granting date, and expiry date.

Note: In the Technical Title field, the supplied values are recognized by the Personnel Ministry for China.

Entering a New Person (People Window)

Use the People window to enter and maintain basic personal information for all person types, including employees and contingent workers.

Note: You can also use one of the template windows such as Entering Employees or Entering Contingent Workers to enter new people.

The minimum information to enter for all categories of people is name and action type. In addition, for employees you must enter gender, employee number (if your enterprise uses manual number entry), date of birth (for assignment to a payroll), and National Identity Card number (if your employee is a Chinese citizen).

Your localization may require additional mandatory information for a person. See: Entering Additional Personal Information (People Window), page 5-13

To enter a new person:

1. Set your effective date to the appropriate date for adding the person to the application. If you are entering an employee, this should be their hire date.

2. Enter the person's name and other details in the Name region. Only the last name is required.

   Note: For citizens of China, you can enter the first and last names in Chinese characters. If your employee is a citizen of China, the first and last names are taken from this region and printed on reports without an intervening space.

   If the Name in Chinese Character Set is set to Yes at Business Group level, which means, the name region on Person window is set up in Simplified Chinese for non-expatriates, the title displays at the end of full name. And for expatriates, if you enter in English character set, then the title displays between last name and first name.

   You must ensure to set the HR: Use Title in Person's Full Name profile option to 'Yes' if you want to display the title in the full name.

   - Select a title such as Mrs. or Doctor for the person, in the Title field.

- You can use the Prefix field to enter the first part of the person's name, such as van der. In the case of someone whose last name is van der Zee, this enables you to sort by the last word of the name, that is Zee. If the whole name van der Zee is entered in the Family / Last field, the name is sorted under van.

  Note: Report generation sorts employees who are citizens of China by their legal English names as entered in the Further Name tabbed region of the People window.

- The Suffix field is used to hold part of the last name, such as Junior or II. This enables the suffix to be reported on separately, as required in some government-mandated reports.

3. Select the gender for the person.

4. Select an action type, for example Create Employment for an employee, in the Action field, and select a person type from the list of values. The person type you select displays immediately in the Person Type for Action field before you save it. If only one user person type exists for the action type, a list of values is not displayed and the user person type displays automatically in the Person Type for Action field.

   Note: If you enter a person as a contingent worker who has a previous person type, you can choose to revert the contingent worker back to the previous person type by using the Cancel Placement action. For example, if the contingent worker was previously an ex-employee, you can revert them back to the person type of ex-employee.

   You create user person types in the Person Types window. If you want to change a person type to another person type with the same system person type you must use the Person Type Usage window.

   See: Changing Person Type Usage and Deleting OAB Person Type Usage, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Employee Information:

Enter the following information if the person is an employee. Otherwise, proceed to Step 6.

1. If necessary, change the Latest Start Date field.

   - The Latest Start Date field displays your effective date.

   - For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period

of service. This date must be on or before the start date of the earliest period of service. The Date First Hired field is situated on the Benefits tabbed region.

If the latest start date and the date first hired are the same, when you amend the latest start date, the date first hired is set to the same date.

If you amend the latest start date to earlier than the date first hired, the date first hired is set to the same date.

> **Note:** If your employee is a returning worker for your enterprise, you can also store this information in the person Extra Information Type (EIT) called Other Employee Data. This predefined EIT is especially useful if your enterprise is a public sector or state-owned unit.

Entering Identification Information:

Enter the person's identification information in the Identification region:

1. If your enterprise uses a manual number generation scheme, enter an employee, applicant, or contingent worker number. If your enterprise uses automatic number generation (including Use Employee Numbering for contingent workers), the employee, applicant, or contingent worker number automatically displays when you save your entries in this window.

   > **Note:** If you query a person who has a combination of employee, applicant, and contingent worker numbers the employee number is displayed in the Number field. If the person does not have an employee number but has a contingent worker number and an applicant number the contingent worker number is displayed. However, you can choose to view any of the identification numbers held for a person by selecting them from the list.

2. Enter the National Identity Card number.

   > **Note:** If your employee is a citizen of China, then you must enter a 15-character or an 18-character value in this field. If your employee is an expatriate and you selected Yes in the Expatriate field of the Miscellaneous tabbed region in the People window, then you need not enter a National Identity Card number.

See: Entering Additional Personal Information (People Window) , page 5-13

Entering Personal Details:

Enter details for the person as required in the Personal tabbed region:

1. Enter a date of birth. You must do this before you can assign an employee to a payroll.

2. Enter additional birth information into the Original Hometown, Place of Birth, and Country of Birth fields. The Original Hometown field stores the name of the place where your employee's ancestors lived.

3. If the Work Telephone field displays, enter a work telephone number. Otherwise, use the Phone Numbers window to enter this information.

4. In the Status field, select a marital status.

5. Select a nationality.

6. Select whether your employee, applicant, or contingent worker is:

   - Registered disabled
   - Not registered disabled
   - Partially disabled
   - Fully disabled

   > **Note:** Whether employees are fully or partially disabled affects benefits eligibility calculations.

7. Save your work.

   Multiple Person Records

   1. If a person already exists on your application with the same national identifier, or with the same surname and a first name and date of birth that is either the same or not entered, then a list of values is displayed that shows all the people who share the details.

      If you have not entered either a first name or a date of birth then the list of values will display all the records that match the information you have entered.

      > **Note:** The list of values is displayed only if your system administrator has set the HR: Cross Business Group profile option to Yes.

Do one of the following:

- If the person you are entering already exists, but in a different business group, then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. If your application has person synchronization enabled, then the personal information entered for the new person will be copied across to existing records in other business groups. If existing records have values for fields that have been left blank in the new record, then these values will be appear in the new record. See: Person Record Synchronization, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

- If the person already exists in your current business group then select that person from the list of values. The existing record is retrieved and the save you were trying to make is cancelled as you cannot have two records for the same person in one business group. Close the new record and scroll down to display the existing record.

  Note: You cannot link to any entry in the list of values marked with an asterisk as these are either in your business group, or are linked to a person in your business group.

- If the person already exists in TCA, but not in HRMS then select that person from the list of values. The person you are entering is saved in your current business group and linked to the existing person record to indicate they are the same person. The information held for the person in TCA is updated with that entered in HRMS.

- If the person you are entering does not match any of the records displayed, then select No Match in the lookup. Your new person record is saved.

What Next?

Optionally, you can enter additional information for people in the tabbed regions. See: Entering Additional Personal Information (People Window), page 5-13

Note: The Background, Medical, and Rehire tabbed regions appear only if your system administrator has enabled them for you.

Entering Additional Personal Information (People Window)

You can enter additional information for people in the tabbed regions of the People window described in the following steps.

Note: The Background, Medical, and Rehire tabbed regions appear only if your system administrator has enabled them for you.

To enter office information for a new hire or an existing person:

1. Choose the Office Details tabbed region.
2. Enter the office number for this office.
3. Enter the internal location of this office.
4. Enter the office identifier for internal mail.
5. Enter the person's email address.
6. In the Mail To field, select Home or Office to indicate the person's preferred mail destination.

To enter information for an applicant:

1. Choose the Applicant tabbed region.
2. If the applicant's resume is on file, check the Exists check box.
3. If the applicant's resume is on file, select the date indicating when the resume was last updated.
4. Select a final date a file is to be maintained for this applicant.

To enter information concerning the background check for a person:

1. Choose the Background tabbed region.
2. Check whether the person's background check has been performed.
3. Select the date the background check was performed.

To enter rehire recommendation information for an applicant who was a former person:

1. Choose the Rehire tabbed region.
2. Check whether the former manager has recommended the applicant for rehire.
3. .Select the reason for this recommendation.

To enter further name information:

1. Choose the Further Name tabbed region.

2. Enter the legal English name of the person if you want to, otherwise leave the field blank. The legal English name comprises the family and given names, appears on the passport of the person, and is normally written and printed in capital letters.

   Note: The report is sorted by the core name entered using the People window. However, the printed names on reports are as entered in the main People window and may be in Chinese characters.

3. If the person was previously known by a different name, enter that name in English letters or Chinese characters.

4. Optionally, enter the person's preferred name.

To enter further personal information:

1. Choose the Further Personal tabbed region.

2. Select the Hukou type and location for the person. The application uses this information in benefit calculations and statutory reports.

   Note: You must specify this information for a Chinese citizen.

3. Select the race or ethnic group of the person.

4. Enter the person's identification card number for statutory social insurances, if relevant. Some cities, such as Shanghai, issue these cards to participants of statutory social insurances.

To enter miscellaneous information:

1. Choose the Miscellaneous tabbed region.

2. Select the person's highest education level to appear in various reports, such as the Employee Basic Information report. You can also record and view qualification details using the Qualifications window.

3. Select the degree the person holds to appear in various reports such as the China Shared Information Data Export for China Data Interface of Accounting Software standard.

4. Enter the number of children that the person has, and select the present health status of the person.

5. Select Yes in the Expatriate field to indicate that the employee is entitled to a higher tax exempt amount, otherwise select No to use the normal tax exempt amount. Selecting No prints the person's first and last names without an intervening space in various reports.

6. Select Yes in the Tax Exemption Indicator to indicate that the worker is eligible for standard reduction of taxation by 30 percent during payroll calculation. Enter a value in the Percent field to override this predefined global value of 30 percent. In China, some individuals, such as disabled veterans and the dependants of martyrs, are eligible for this reduction in tax.

7. If you have selected Yes in the Tax Exemption Indicator, the Monthly Tax Reduction Amount field becomes editable. You can enter an amount that can be used in monthly payroll processing for tax calculation.

   Note: You must set up either the tax reduction percentage or the tax reduction amount but not both.

To enter medical information for the person:

1. Choose the Medical tabbed region.

2. Select the person's blood type.

3. Select the date of this person's last medical test.

4. Enter the name of the physician who performed this test.

To enter other information for a person:

1. Choose the Other tabbed region.

2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week the person works.

3. Enter the person's current full time or part time availability to work with your enterprise.

4. Select the language the person prefers for correspondence.

   For example, select German if the person prefers to correspond or receive company information such as terms of pension plan in German.

Note: The Correspondence Language list includes languages in the FND_LANGUAGES table. This table contains the languages that Oracle National Language Support Runtime Library (Oracle NLSRTL) supports. Check with your System Administrator for information on NLSRTL supported languages.

5. If the person has died, enter the date of death.

   If you enter the termination reason of deceased and the actual termination date in the Terminate window, and do not enter the date of death, the system will default to the person's termination date.

6. Select the current status of the student, if the person is a student.

7. In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.

8. Check the Military Service check box if the person is employed in a military service in some capacity.

   The value of this field can impact benefits calculations.

9. Check the Second Passport Exists check box if the person possesses multiple passports.

To enter benefits information:

1. Choose the Benefits tabbed region.

   Note: If necessary, you can add the Benefits tabbed region to the People window. Query the BEN_MANAGER menu in the Menus window and add the HR View Benefits function to the menu.

2. Enter a benefit group for the person. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated. They can also be used where a person is grandfathered into a very old plan.

3. Enter what kind of tobacco the person uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.

4. Enter medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.

5. Enter the adoption date, if the person whose record you are updating has adopted a child. This information, with the child's date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.

6. Enter the date you received the death certificate, if the person has died. You can only enter this once you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.

7. Enter an adjusted service date for the person. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grandfathered benefits or in the case of mergers and acquisitions.

8. Change the date first hired for the person. For persons who have previously worked for your enterprise, the Date First Hired field displays the start date of your person's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

9. Check the Other Coverage checkbox, if your person has externally provided coverage. This determines a person's eligibility for certain plans.

10. Check the Voluntary Service checkbox, if the person is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

Contracts

Contracts

Using Oracle HRMS you can record contractual information for your employees and employee applicants. Information relating to the contract reference, contract status, and contract type must all be entered. This information can then be used for reporting purposes, or to produce a hard copy of the contract to send to the person for reference and signing.

Once a contract is entered for a person you can refer an assignment to it using the Assignment window. Each person may have multiple contracts, but an assignment may refer only to one contract.

German public sector users can use contracts to control the values of certain fields in the Assignment window. Once you refer an assignment to a contract then fields such as Position, Grade, Employment Category, and Collective Agreement display the values set for the contract, and cannot be updated in the Assignment window. To update these values you must make changes to the contract.

To give your managers access to more complete records for their direct reports, you can display details of their current contracts of employment, as well as any historical contract information, in the My Employee Information pages in SSHR.

You can also display contract details to the My Information pages so that your employees can also view their own information whilst accessing SSHR.

There are a number of rules that relate to the creation and maintenance of contracts:

- A contract cannot exist without a person. Therefore, if a person who has a contract attached to them is deleted, the contract will also be deleted.

- Contract statuses are set up depending on the needs of your enterprise. If you have any queries about contract statuses, please contact your system administrator.

- If the alteration of a hire date for an employee results in the start date for the contract being before the hire date, the contract start date is automatically amended to the new hire date.

  Tip: If the alteration of a hire date results in future-dated changes being before the contract start date, the changes are deleted.

- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.

- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

Creating Contract Statuses

Using the Lookup type CONTRACT_STATUS, Oracle HRMS enables you to create up to 250 different contract statuses to help track and identify contracts within your enterprise.

To create contract statuses:

You must create your contract statuses before using the Contracts window to assign contracts.

Use the Application Utilities Lookups Window to create contract statuses for the Lookup type CONTRACT_STATUS.

1. Enter the lookup code. Adding a prefix to the lookup code defines whether the contract status is active, inactive or obsolete.
   - **A-**: You should use this prefix to indicate a contract status is active.
   - **O-**: You should use this prefix to indicate a contract status is obsolete.

     Note: If a contract status has no prefix it is assumed to mean that the contract is Inactive.

2. Enter a meaning and, optionally, a description for the Lookup code.

   See: Adding Lookup Types and Values, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Defining Contract Letter Types

To generate a hard copy of a contract you must first write and register an SQL*Plus script in the same way as if you were generating a standard letter.

For information about writing SQL*Plus scripts, see: Writing a SQL*Plus Script for MultiMate or WordPerfect, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

The Letter window enables you to link your SQL*Plus script for the contract with your contract letter type.

Note: To set up a contract letter type you must access the Letter window using the Contract Letter Type menu entry. You cannot automatically generate contract letters when the assignment status changes.

To define a contract letter type:

1. Enter a name for the letter.
2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.
3. Save your contract letter type.

Entering Contracts

You enter and maintain contracts in the Contracts window.

You can specify more contract-related information, such as notice periods, in the Further Contract Information window. Maintenance of the contract between your employee and enterprise can also be done in this window.

To enter a new contract:

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.
3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.

   See: Creating Contract Statuses, page 5-20
4. Select the contract type.
5. Select the status of the contract, such as pending, opened, printed, and so on. You must set up document statuses using the user extensible Lookup Type DOCUMENT_STATUS. Enter the date the document status of the contract changed.

   Note: The document status is not datetracked.
6. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.

Entering Further Contract Information

1. Click in the More Information field to open the Further Contract Information window.

2. Enter the date on which your employee and enterprise agreed to the contract.

3. Specify the probation duration.

4. Enter the constructive and actual end dates for probation. In the Constructive Probation End Date field, enter the date on which probation is planned to end according to the contract. Once your employee's probation has actually ended, enter this date in the Actual Probation End Date field.

5. Enter the notice periods for resignation and dismissal during and after the contract's probation. Select the unit for calculation of notice periods. This unit applies to all four notice periods that you have entered.

6. Indicate whether or not a competition clause exists in the contract.

7. Indicate whether or not an agreement on business secrets exists between your employee and enterprise.

   Note: The remaining fields in the Further Contract Information window pertain to maintaining contracts.

   See: Maintaining Contracts, page 5-22

8. Save your work.

   You can attach an electronic copy of any written contract that accompanies the record using the Attachments button.

   See: Using Attachments, *Oracle Applications User's Guide*

Maintaining Contracts

The amendments made to a contract are datetracked. The result of any changes made to the status of a contract is dependent on whether the record is being corrected or updated. For example:

- If you change the status of an active contract to make it inactive and choose the Update button, the contract record will be ended. A new contract record with an inactive status will be created and the fields in the Active Dates region will become blank.

- If you change the status of an active contract to make it inactive and choose the Correction button, the current contract record will be amended to appear as if

the most recent active period has never occurred.

You can use the Further Contract Information window for tracking maintenance of the contract:

7. If you change your contract, you can enter a reason and date for the change.

8. If you extend or terminate your contract, you can enter dates for these actions.

9. If you cancel your contract, you can enter a reason and date for cancellation.

   Note: Termination refers to ending of the contract according to its clauses and under other conditions. Cancellation refers to ending of the contract before its period is over; your employee or enterprise can request contract cancellation.

10. You can enter the number of the file that contains details about the contract's cancellation.

    Note: Usually, public sector or state-owned enterprises in China maintain official files on cancellations of contracts for high-level positions.

11. You can enter the status of the contract's renewal.

    Deleting Contracts

    If you mistakenly save information in the Contracts window, you can delete it. You cannot perform this action if the contract is referenced by an assignment.

    Note: Contracts cannot be date effectively end dated.

To delete a contract:

1. Query the contract in the Contracts window.

2. Select Delete Record from the Edit menu, and proceed as instructed in the displayed windows.

Managing Contracts

The Manage Contracts folder enables you to:

- search for different groups of people using a wide variety of criteria

- view basic person information and comprehensive contract information
- initiate a mail merge to produce written contracts
- mass update the document status of contracts
- navigate to the Person, Assignment and Contracts windows.

Find Contracts

The Find Contracts window automatically displays when you enter the Manage Contracts folder. This enables you to select different groups of people to manage. For example, you can find people who:

- do not currently have a contract
- have a contract with a particular status
- are assigned to a particular organization

You can also show people with all assignments covered by the contract or just their primary assignment.

To find contracts:

1. Enter a full or partial query on one, a selection, or all of the available person information:
2. Select whether to find people either with or without a contract. Leave blank to find people with and without contracts.
3. Enter full or partial queries on contract and assignment details using the tabbed regions.

   In the Assignment tabbed region you can select to only view the primary assignment and those assignments covered by a contract. A person can be linked to a contract, but they are only covered by a contract when it is linked to a specific assignment.

   > **Note:** You can generate contracts for a person's assignment that is not covered by a contract. See: Generating and Printing Contracts, page 5-25

4. Select Find to find all the employees and employee applicants who match your query.

Manage Contracts

The Manage Contracts window displays all the employees and employee applicants

you have queried. Use standard folder features to select a subset of these records and to choose the fields to view.

If you want to see the personal, assignment, or contract details for a selected person you can select the person and use the buttons to navigate to the required window

> **Note:** You must only have one person selected in order to be able to navigate to the Person, Assignment or Contract window.

You can also use the Manage Contracts window to update the document status of a number of contracts at once.

To mass update the document status of contracts:

1. Select a person or a number of people with contracts.
2. Choose the Update Status button.
3. Select the new document status, such as pending, opened, printed.

   > **Note:** You set up document statuses in the Contracts window using the Lookup Type DOCUMENT_STATUS.

4. Choose OK.

   The selected contracts are updated with the new document status.

Generating and Printing Contracts

Before you generate contracts for your employees and employee applicants in the Manage Contracts window you must ensure any rows returned for a person have a contract reference and assignment number.

If a person does not have a contract reference you can navigate to the Contract window and set up a contract reference.

If a person has multiple assignments, *MULTIPLE* displays in the Assignment Number field. You must select an assignment number. The information recorded for the assignment is extracted by your SQL*Plus script and used as the source of information for the printed contract. You can either select an assignment covered by a contract or an assignment which is not covered by a specific contract.

Selecting an assignment that is not covered by an contract enables you to use different assignment details in your generated contract from those held for the assignment covered by the contract.

For example, you might want to record detailed information against the assignment that is covered by a contract, but include more general information on the printed

contract. On the assignment covered by a contract you could set up a location of Building 1, Bond Street office. On the assignment used to generate the contract you could set up a more general location, such as UK Headquarters. By selecting the assignment with the location of UK Headquarters in the Manage Contract window, rather than the assignment covered by the contract, you can print a contract with the less specific information you require. However, you still keep the more detailed information recorded against your person and contract.

> **Note:** Selecting an assignment does not permanently link (or cover) an assignment to a contract, it enables you to generate a contract including the information on the assignment. To set up a person's assignment so they are permanently covered you must use the Employment Terms tabbed region on the Assignment or Applicant window.

If you only want to view assignments covered by a person's contract use the Covered By Contract field in the Find Contract window.

To select an assignment:

1. Select the list of values button in the Assignment Number field.
2. Select an assignment number for the person and contract.

To generate a contract:

1. Select a person or a number of people for which to generate contracts.
2. Choose the Generate Contract button.
3. Select a letter type for the contract in the Generate Contract window.

   > **Note:** Letter types are set up and linked to SQL*PLUS scripts using the Letter window accessed from the Contract Letter Type menu entry.

4. Choose OK.

   Oracle HRMS runs the SQL*Plus script for this type of letter and displays the request ID.

5. Query the request ID in the Concurrent Requests window and monitor its progress.

   > **Note:** Consult your installation guide for details of the location Concurrent Manager places the output or data file

6. If your letters are produced by Oracle Reports, they are ready for printing. If you use your word processor's mail merge facility you are ready to merge the data.

   See: Merging the Data File With the Standard Letter MultiMate or WordPerfect, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Workforce Information Management

Assignment Statuses

Statuses enable you to track the progress of your applicants, employees, and contingent workers through your enterprise. If you use Oracle Payroll, they also control how employee assignments are used during a payroll run. Oracle HRMS is installed with a number of predefined system statuses, for which you can set up multiple user statuses.

Note: You do not process contingent workers in a payroll run.

Primary Statuses

There are four system statuses for assignments:

- **Active Assignment**: For employees and contingent workers you use this status to show that the person is working in accordance with his or her usual conditions of working.

- **Suspend Assignment**: For employees you use this status to show that an employee is on leave of absence, but remains an employee with your enterprise. Similarly for contingent workers the suspend assignment indicates that a contingent worker is not currently working in the assignment they are allocated to. For example, the contingent worker may have taken an unauthorized absence or the assignment may have been suspended due to an internal review.

- **Terminate Assignment**: Use this to show that your enterprise no longer employs the person in that assignment. It can still be possible to make payments through Oracle Payroll for assignments at this status. This status is not available for use with contingent workers.

- **End**:Use this to end any assignment except the primary assignment for an employee or contingent worker with multiple assignments. This status is not recorded on the assignment; it causes the assignment to end. For employees all payroll processing for the assignment is complete and the assignment becomes an historical record.

For information about system statuses for applicants see: Applicant Assignment Statuses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

User Statuses

On your system, you can give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for the system status Suspend Assignment, you could define the user statuses Paternity

Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

> **Note:** Each system status has a predefined user status of the same name.

Primary user statuses help you track the current working circumstances of your employees and contingent workers. You can also define secondary user statuses having no associated system statuses. You can use these for reporting purposes.

> **Note:** The User Statuses you define provide the list of values for Status in the Assignment window. If you want to change any of the predefined default values you must overwrite the User Name.

Using Assignment Statuses to Control Compensation

When you define user statuses, consider how you will use them in reports, inquiries, and processing.

When you use a validation formula to validate entries to element input values, you can make the valid values for an entry dependent on the assignment status.

To use the statuses to control whether the payroll run processes an employee assignment, you choose a Payroll user status of Process or Do not Process for each user status. Additionally, in Oracle Payroll you can set up your pay calculation formulas so that a status change also changes the formula used to calculate the employee's pay. For example, an employee could receive half pay while on Military Leave.

Secondary Assignment Statuses

For analysis and reporting purposes, you can set up and use *secondary* assignment statuses, for employee, applicant and contingent worker assignments. These statuses have no effect on assignment processing.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments), CWK_SEC_ASSIGN_REASON (for contingent workers), and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

To enable payroll processing for employees after they leave your enterprise, in your system setup you must do the following:

- Set the Termination Rule to *Final* on the element definition of all elements you want to process after the actual leaving date.

  If you use Oracle Payroll and have a Payroll responsibility, you can set the Termination Rule to *Last Standard Process* for elements whose entries should close down after the last normal payroll run. Set the Termination Rule to *Final* for elements you want to process as late payments after the last normal payroll run.

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:
  - the HR system status of *Terminate Assignment*
  - the Payroll system status of *Process*

    Your startup data includes the user status Terminate Process Assignment, which matches this definition. Use this status (or your own equivalent status) when you terminate employment or end an assignment.

Defining Assignment Statuses (Assignment Window)

You define both primary and secondary user statuses. In the Assignment Statuses window you can define these statuses for both employee and applicant assignments.

Defining Primary User Statuses

To rename a user status:

1. Delete the contents of the User Status field and type in your preferred name.

To supply additional user statuses for a system status:

1. Insert a new record.
2. Type in your user status name.
3. If you are using iRecruitment, you can enter an external status for your applicant assignment user statuses. This status is displayed to candidates in iRecruitment. For example, you may want to create an external status of 'Interview' for applicant assignment user statuses of 'Pending Interview' and 'Interview Passed'. The candidate in iRecruitment would see the external status and the manager would see the user status names.

4. Select a Human Resource system status.

5. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.

   Note: If you select a payroll system status of Do Not Process, payroll will still create assignment actions for assignments with this status. It is these assignment actions that will not be processed.

6. Save the new status.

   Note: For each system status, you must have one default user status. The system automatically uses the default in certain situations. For example, when you create a new employee assignment, it automatically has the default user status corresponding to the system status Active Assignment. You can override this default.

   When you update the assignment statuses, the application saves the changes in the PER_ASS_STATUS_TYPE_AMENDS table instead of the PER_ASSIGNMENT_STATUS_TYPES table.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate a user status, uncheck the Active check box.

Defining Secondary Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments.

To create a secondary status:

1. Insert a new record.

2. Type in a user status and do not select a system status.

   The Type field displays *Secondary*.

Entering an Assignment (Assignment Window)

When you enter an employee or contingent worker, or hire an applicant, Oracle HRMS automatically creates a default assignment. You can view and update the default

assignment in the Assignment window.

You can then enter additional assignments, if required, using the Assignment window.

To enter an assignment:

1. Set your effective date to the start date of the new assignment.

   Germany only: If you want to link a contract to this assignment, you should do so before completing any further fields, as some fields in the Assignment window default to values defined on the contract and cannot be overridden here. Add contract details using the Contract field on the Employment Terms tabbed region. If you are assigning a contingent worker, the Employment Terms tabbed region does not display, preventing you from adding a contract.

2. Select the organization to which you want to assign the employee or contingent worker. By default, the employee has an assignment either to the business group, or to the organization to which he or she applied. Contingent workers have a default assignment connected to the business group.

   If you overwrite these defaults, a window appears asking if the change is an update or a correction. Select Correction.

   If you are creating an additional assignment, no default business group or organization is displayed.

3. Select the job or position for which this person has been assigned.

   France only: For a public sector type organization, the Position field is read only. Oracle HRMS displays the position details you recorded using the HR Administrator Actions pages.

   Russia only: Click the Attachments Menu icon on the tool bar to enter the contingent worker's job description.

   India only: The position selected is displayed on the employee's Form 16.

4. For employee assignments, select a grade for information or to use grade rates or grade scales to determine the appropriate compensation levels for the employee.

5. If you defined a location for the business group or other organization, it appears as a default. Change this, if required.

   Mexico only: The assignment's location determines its GRE.

   - If you have assigned multiple GREs to a location (through the generic hierarchy), you must choose which one applies to this assignment. Navigate to the Statutory Information tabbed region and make a selection in the Government Reporting Entity field.

   - If you change your assignment's GRE, you must specify a Social Security

Leaving Reason (under the Social Security Affiliation tabbed region).

See: Transferring Employees, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide (Mexico)*

6. **France only**: Select the establishment as it serves as the legal point of contact for settling any disputes and manages the personal details of the workforce.

   Note: For a public sector type organization, the Establishment field is read only. Oracle HRMS displays the establishment details you recorded using the HR Administrator Actions pages.

7. **Netherlands only**: Select the reporting employer. The assignment is reported under this employer in the wage report. If you change the employer establishment after running the payroll and before running the Wage Report, the collective report section on the Wage report will not match the sum of nominative reports.

   Note: By default, the assignment is reported under the employer linked to the assignment's payroll. Changing the employer does not change the Payroll Object Group. To change the Payroll Object Group, terminate the existing assignment and create a new assignment with a new payroll. You can change the employer linked to the payroll using the Payroll window.

8. Select the people group and enter information defined in your people group flexfield. This is optional.

9. Select a payroll if you are paying an employee using Oracle Payroll, or if you intend to record for the employee certain types of compensation and benefits (represented on the system by *nonrecurring elements*).

   Note: If Oracle Payroll is installed and you are an HR User, you cannot assign employees to payrolls. Ask your system administrator to change your HR:User Type profile option if you need to assign employees to payrolls.

   Note: Denmark Users: Select Salaried or Hourly. There is no relation to the Payroll frequency.

10. Select a status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

    See: Assignment Statuses, page 5-28

Australia Only: Select if the employee works overseas or as part of Joint Petroleum Development Area (JPDA). The status you specify determines which earnings appear on which Payment Summary.

11. **Korea Only**: Select the business place to which you assign your employee.

12. Enter an assignment number to uniquely identify the assignment. By default, this number is the same as the employee or contingent worker number, for the first assignment.

13. For employee assignments, select a collective agreement if the employee is covered by one.

    You can calculate values based on a collective agreement only for an employee's primary assignment.

14. Select an assignment category, for example part-time or full-time.

    Hungary only: Select an employment category, for example part-time or full-time.

    Ireland only: Select an employment category, for example part-time or full-time. Select Apprentice/Trainee if the assignment is an apprentice or a trainee.

    Mexico only: Select the employee's Social Security employment type.

    See: Define the Social Security Employment Types, *Oracle HRMS Implementation Guide (Mexico)*

    Russia only: This field is mandatory to enable you to use them for reporting purposes. Use only the four values available for this field. For these values, the suffix Regular refers to an assignment with an indefinite period (permanent). The suffix Temporary refers to an assignment having a limited term.

15. For employee assignments, select the employee category, for example blue collar or white collar.

    Ireland only: Select a valid employment category from the list. The list displays all the occupation categories for reporting in the EHECS report.

    Mexico only: Select the employee's Social Security employment category.

    Spain only: Select the professional category, for example administration clerk or civil servant.

16. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points, or salary information.

    See: Entering Additional Assignment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

    You can use the Oracle HRMS and Common application Components (CAC) integrated schedule features to assign a schedule to the worker's assignment. If you want the application to only display schedules the worker is eligible for, then run

the Eligibility Engine process for the worker.

See: Setting Up Availability, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Entering Additional Assignment Details (Assignment Window)

Once you have set up the person's basic assignment details, you can enter additional information in the tabbed regions of the Assignment window, for example, supervisor details, special ceiling progression points, or salary information. The tabbed regions that appear in the Assignment window vary according to person type and localization.

> **Note:** For countries other than the US or UK, your Oracle localization team may have created additional fields in a tabbed region if there are legislative requirements in your country to hold additional employment information.

To enter supervisor information for an employee or contingent worker:

1. Choose the Supervisor tabbed region.
2. Select the name and number of the worker's personal supervisor. If you use assignment-based supervisor hierarchies, select the supervisor's assignment number.

   You can select a contingent worker as a supervisor only if the HR: Expand Role of Contingent Worker user profile option is set toYes.

   You can select a supervisor from another business group if the HR: Cross Business Group user profile option is set to Yes at your site.

   > **Note:** This information is not updated by the system. Use organization and position hierarchies to show management reporting lines.

Entering Probation and Notice Period Information

The probation period defaults from the employee's position.

To enter probation period and notice information for an employee:

1. Choose the Probation and Notice Period tabbed region.
2. Amend the default probation period for the person's assignment, if required.
3. Enter the notice period for the assignment, if required.

Entering Standard Conditions Information

The standard work day information (apart from the Hourly/Salaried field) defaults from the position. If standard conditions are not defined for the position, they default from the employee's organization or business group.

To enter standard conditions information for an employee or contingent worker:

1. Choose the Standard Conditions tabbed region.
2. Amend the standard work day information for the person's assignment, if required.
3. For benefit administration, enter whether the person's assignment is hourly or salaried. If you are in the US, benefits are often based on whether a person is paid hourly or receives a salary.

   Note: If you are setting up benefits based on salaried or hourly pay you must set up the Hourly/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables the person to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether the person is paid hourly or receives a salary.

Entering Statutory Information

To enter statutory information:

1. Choose the Statutory Information tabbed region.
2. Click in the field to open the CN Statutory Info window.
3. Select the employer for the person.

   Note: The Employer field will display only those region-specific organizations (in your business group) that you have set up as Government Reporting Entities (GREs) / legal entities with employer information.

   See: Entering Employer Information for a GRE, page 1-40

4. Select the tax area to which your person must submit income-tax returns and the contribution area that must receive your person's payments for social insurance and the Public Housing Fund (PHF). Enter the location at which your person will be paid. If you have selected your person type as contingent worker, these fields do not appear in the window.

Note: Normally, the locations you select in the Tax Area, Social Insurance / PHF Contribution Area, and Salary Payout Location fields should correspond to your employee's work location.

To override the contribution area you select here, use the Element Entries window. See: Entering a PHF Information Element, page 4-17.

5. Select the special tax exemption category if the employee is eligible for a special tax exemption. Employees who are Seamen, Chinese persons working overseas or Chinese persons working in Taiwan, Hong Kong or Macao are all eligible for the special tax exemption. Leave the field blank if the employee is not eligible for the special tax exemption.

Entering Primary or Secondary Assignment and Miscellaneous Information

To enter primary or secondary assignment and miscellaneous information for an employee or contingent worker:

1. Choose the Miscellaneous tabbed region.

2. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.

3. Select a reason for adding or changing the assignment, if required. You define valid reasons as values for the lookup types Reason for Change to Employee Assignment (EMP_ASSIGN_REASON) for employees and Contingent Worker Assignment Reasons (CWK_ASSIGN_REASON) for contingent workers..

4. If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, the purchase order line may include the projected assignment end date. In this case, the date appears in the Projected Assignment End field. Otherwise, enter the projected end date of the assignment.

5. Select the Manager box if the assignment is at the manager level and you want to include this worker in the Organization Hierarchy Report as a manager. (You can select Manager for a contingent worker assignment only if the HR: Expand Role of Contingent Worker user profile option is set to Yes.)

   Primary or Secondary Assignment

   By default, the first assignment entered for the person is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, the Primary box is automatically unchecked. You can leave the Primary box as it is.

   1. Check the Primary check box to update a secondary assignment to Primary.

See: Changing Primary Assignments , page 5-42

Entering Employment Terms

Entering Special Ceiling Information

A special ceiling progression point is the highest point to which the Increment Progression Points process can automatically progress the employee.

To enter special ceiling information for an employee:

1. Choose the Special Ceiling tabbed region.
2. Enter a special ceiling if the person is assigned to a grade, and a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

Entering Salary Information/Assign Employees to a Salary Basis

Use the Salary page to enter a proposed salary change for an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

To enter salary information for an employee:

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.
3. You can also enter the frequency of salary and performance reviews.

> **Note:** When you change salary basis for an assignment, the application end dates the existing proposal and creates a new salary proposal. The new proposal updates the salary element entry automatically. When you remove a salary basis from an assignment, the application end dates the existing salary element entry, enabling you to manually create a new salary element entry effective from the date of the salary basis change.

For more information about salary administration, see: Salary Administration, *Oracle HRMS Compensation and Benefits Management Guide*

Entering Bargaining Unit and Union Membership Information

To enter bargaining unit and union membership information for an employee:

1. Choose the Bargaining Unit tabbed region.

2. Enter a bargaining unit code for the person's assignment. This is usually the legally recognized collective negotiating organization.

   Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE.

3. Select whether the person associated with the assignment is a member of a union.

Entering a Billing Title (Oracle Projects only)

To enter a billing title for an employee or contingent worker (Oracle Projects only):

- Choose the Project Information tabbed region and enter a billing title.

  Note: This tabbed region displays only if you have Oracle Projects installed.

Entering Grade Ladder Information

To enter grade ladder information for an employee:

You must enter grade ladder information to use the Grade/Step Progression process.

1. Choose the Grade Ladder tabbed region.

2. Select the grade ladder for this assignment. If you selected a grade for this assignment previously, all the grade ladders that use that grade are available. If you have not selected a grade, all the active grade ladders in your enterprise are available.

Entering Supplier Information

To enter supplier information for a contingent worker:

You use the Supplier tabbed region to record information about the supplier providing the contingent worker to your enterprise. The procedure depends on whether you are using Oracle Services Procurement to provide purchase order information for contingent worker assignments.

If you are not using Oracle Services Procurement

1. Choose the Supplier tabbed region.
2. Select the names of the supplier and the supplier site for the contingent worker.
3. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

If you are using Oracle Services Procurement

1. Choose the Supplier tabbed region.
2.
3. Select a purchase order number for this assignment.
4. If only one purchase order line exists, it appears in the Purchase Order Line field. Otherwise, select a purchase order line. Note that the Purchase Order Line field is enabled only when you select a purchase order.
5. Information from the purchase order appears automatically in the Supplier Name and Supplier Site fields. If the purchase order line includes a job value, it replaces any value in the Job field.
6.
7. Enter supplier IDs for the contingent worker and the assignment, if available. These values identify the worker and the assignment to the supplier.

Entering Additional Employment Information (Multiple windows)

Just as you can record additional information about people, such as their addresses, contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

1. You can propose or approve a salary change in the Salary Administration window.

   See: Entering Salary for a New Employee (or One Assigned to a New Salary Basis), *Oracle HRMS Compensation and Benefits Management Guide*

2. You can make entries to the earnings, deductions, benefits and other elements the employee is eligible for, using the Element Entries window.

   Mexico only: You must standard link the following elements for all Mexican employees:

   - Employer State Tax
   - Integrated Daily Wage

- Mexico Tax
- Social Security Quota

See: Defining Element Links, *Oracle HRMS Compensation and Benefits Management Guide*

To confirm they are attached to the assignments, or to add them manually, see: Making Manual Element Entries, *Oracle HRMS Compensation and Benefits Management Guide*

3. If you use a pay scale and progression point system, you can place the assignment on a pay scale using the Grade Step Placement window.

   See: Placing an Employee on a Grade Step, *Oracle HRMS Enterprise and Workforce Management Guide*

4. You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

   See: Data Costed at the Organization and Assignment Levels, *Oracle HRMS Enterprise and Workforce Management Guide*

5. You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

   See: Budgeting Overview, *Oracle HRMS Enterprise and Workforce Management Guide*

6. For employees who have assignments to payrolls, you can select the methods by which the employee wants to receive pay for this assignment in the Personal Payment Method window.

   See: Entering Payment Methods for an Employee Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

7. You can enter secondary assignment statuses for analysis and reporting, if these have been defined on your system.

   See: Entering Secondary Assignment Statuses, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

8. You can enter extra information about your employee's assignment using the Extra Assignment Information window.

   See: Enter Extra Information, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

9. You can enter previous employment information for your employee's using the Previous Employment window.

See: Entering Previous Employment Details, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*

Changing Primary Assignments

Over time, a secondary assignment may need to be elevated to a primary assignment. Most enterprises have requirements to show this history of changes in an employee record. You can change assignments from secondary to primary in the Hiring Applicants window or the Managing Employees window.

This process creates two historical records: one showing a secondary assignment that ended, say, on 20 October, and the other showing that the primary assignment started as one set of components and then changed to another set (those of the secondary assignment) on 21 October.

To change a primary assignment:

1. Set an effective date for the change of primary assignment.
2. Find the person using the Data Organizer or the Find window.
3. Select the person in the Data Organizer and select one of their assignments.
4. Choose the Actions button.
5. Select Make Primary Assignment and choose Next.

   The system automatically changes the previous primary assignment from primary to secondary. Query the assignment details to see the changes, or use the Assignment History window to view the employee's assignments. DateTrack History also shows the changes made to assignments.

   For more information about DateTrack see: Viewing the History of Datetracked Information, *Oracle HRMS Enterprise and Workforce Management Guide* and Managing Change Over Time, *Oracle HRMS Enterprise and Workforce Management Guide*
6. **Mexico only:** If the change in assignments involves a change of GREs, you must specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region.

Ending an Assignment (Assignment Window)

An employee must always have one active assignment. If an employee has multiple assignments you can end any of their individual assignments by selecting an assignment status of End or Terminate in the Assignment window as long as at least one assignment remains active. If you want to end all employee assignments at the

same time you use the Termination window. An employee does not become an ex-employee until you have terminated their last assignment.

The following information explains how to use the Assignment window to end multiple assignments.

To end one of several assignments:

1. Query the assignment you want to end.

2. Set your effective date to the actual termination date for the assignment.

3. Update the assignment status to End or Terminate Process Assignment (or the equivalent user status on your system) in the Status field:

   - Use *TerminateProcess Assignment* (with a Payroll system status of *Process*) if further pay processing of the assignment is required after the date the assignment ends. This leaves the assignment's final processing date open so that further processing can occur.

     It is often best to use this status, so that you can process any necessary adjustments to the final pay for the assignment.

   - Use *End* (with a Payroll system status of *Do Not Process*) if all pay processing for the assignment is finished. This makes your effective date the assignment's *final processing date,* after which no further processing for the assignment can occur.

   The End status is not recorded on the assignment. It causes the assignment to end as of the effective date of entry of this status.

   > **Note:** To temporarily prevent pay processing for this assignment, use the status *Terminate Assignment* (with a Payroll system status of *Do Not Process*). When no further processing is required and you are ready to set a final processing date, update the status to *End*.

4. **Mexico only**: Specify a Social Security Leaving Reason in the Social Security Affiliation tabbed region. The Social Security Affiliation reports require this information.

6

Workforce Intelligence

Information Access Overview

Oracle HRMS provides a range of inquiry and reporting mechanisms to meet the needs of different users:

- Predefined Discoverer Workbooks that you can use directly, or edit to meet your own reporting requirements.
- Discoverer End User Layer folders that you can use to create your own Discoverer Workbooks.
- Inquiry windows (including folders)
- Predefined reports that can be scheduled and grouped for periodic processing
- QuickPaint, to create your own online inquiries and reports about people and assignments
- Multilingual reporting for some reports
- Use of desktop tools for reporting or editing HRMS data. For example, you can use Application Data Exchange (ADE) to download information to a spreadsheet, and then upload the modified data to HRMS.

Discoverer Workbooks

Oracle Discoverer is a data query and analytical tool that enables you to perform detailed analysis of the human resources issues that interest you. Discoverer uses an End User Layer (EUL), which is based on a series of business views, to build worksheets and workbooks that report on the data from the underlying HRMS application. There are a number of predefined workbooks, which you can refine by specifying worksheet parameters; you can also build your own workbooks.

Use the following responsibility to access the predefined Discoverer workbooks:

HRMS Ad-Hoc Reporting – Administrator

This responsibility provides access to the HRMS Ad-Hoc Reporting – Administrator menu, which has the following structure:

HRMS Ad-Hoc Reporting – Administrator

- Human Resources
- Recruitment
- Training

The menu structure reflects the functional areas you need to install in order to retrieve data from the workbooks.

Discoverer End User Layer

HRMS contains a predefined End User Layer (EUL) where the data in the underlying database tables is organized in Discoverer as folders. The folders are organized into business areas. You can use this EUL to create your own Discoverer Workbooks.

Use the HRMS Ad-Hoc Reporting – Administrator responsibility to access the following Discoverer business areas:

- HRMS – Administration – Oracle Human Resources
- HRMS – Administration – Oracle Human Resources (Lists of Values)
- HRMS – Administration – Oracle Training Management
- HRMS – Administration – iRecruitment
- HRMS – Compensation and Benefits
- HRMS – General Employment Practices
- HRMS – Training Management
- HRMS – Implementation and Data Set-Up
- HRMS – Workforce Budgeting
- HRMS – Workforce Composition and Activity
- HRMS – Workforce Development and Performance
- HRMS – Workforce Recruitment

- HRMS – Workforce Separation
- HRMS – Workforce Utilization and Productivity
- HRMS – Workforce Costing

For descriptions of these Discoverer business areas, see: Discoverer End User Layer Business Area Descriptions, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Inquiry Windows

Oracle HRMS includes some inquiry windows to meet the most common online reporting requirements. In these windows, you typically enter selection criteria in the first block then choose the Find button to view a list of people, assignments, or other entities that match your criteria. Some of these windows use *folders* to display the information retrieved by your criteria.

Folders are online views that you can configure. By default, the folder block in an inquiry window displays all records matching your inquiry and all fields available within the folder. However, you can create your own folders to display a subset of these records and fields. You can also choose the field labels, their size and order, and the sort sequence of the retrieved records.

For example, in the Assignment Folder window, you could create a folder called Sales Employees by Grade. This folder has the query criteria Organization = "Sales", and it is sorted by grade.

Predefined Reports

There are a number of predefined reports that you can use immediately without any further set up. They have a predefined format but you can choose which records to view by entering a set of parameters when you submit the report.

You can also create your own reports using Oracle Reports or SQL*Plus or another tool of your choice. You can register them with Application Object Library. This means you can run them from the standard Submit Requests window, and you can schedule them in report sets with other reports and processes.

Multilingual Reporting

Oracle HRMS enables you to print reports in the language of your choice.

HR Reports

You can select in which language the following reports are printed:

- Full Person Details

- Full Applicant Details
- Full Assignment Details
- Full Work Details

See: Submitting a Request, *Oracle Applications User's Guide*

Payroll Reports

Payroll reports are usually submitted in the language of your Business Group, for example the US Check writer can only be printed in American English and the GB Deposit Advice can only be printed in English. However, you may be able to print payroll reports in multiple languages if your localization team has created legislation specific reports for you to use.

> **Note:** The default HRMS payrolls for the US and UK can only be run in English.

Using Oracle HRMS with Spreadsheets

You can use Oracle Application Data Exchange (ADE) to download information from the HRMS database to a spreadsheet for analysis and manipulation. For example, you can download data on current and proposed salaries for a group of employees. You can adjust the salary proposals in the spreadsheet, or enter new ones, and upload the revised data to the database. The ADE upload process reports any errors and ensures that only valid data is saved in the database.

To download information from a form to a spreadsheet using ADE, your system administrator needs to create a style in ADE. The style defines the form it is used for, the responsibilities that can use it, and the columns (or fields) to be downloaded. You determine which records are downloaded by running a query in the form before launching ADE.

A style for downloading salary proposals is predefined.

See *Using Application Data Exchange*.

QuickPaint

QuickPaint is a powerful and flexible tool to design reports about assignments in the format you require. You can include the following sorts of information in a QuickPaint report:

- Personal information
- Contact information

- Assignment information
- Application information
- Compensation and benefit information
- Descriptive flexfield information

Once you have designed a QuickPaint report, you and other users can run the report online for any assignment or set of assignments. You can view the results online or print them.

Configuring the Run QuickPaint Report Window

Using the standard QuickPaint Report window, you can run the report for an assignment or an assignment set. The assignments can be held by current employees or applicants.

Your system administrator can create configured versions of this window to restrict the reports you can run and the people you can report on. A configured version might be subject to one or more of the following restrictions:

- Report on one person type only (employees OR applicants).
- Run one report only.
- Report on single assignments only, or report on assignment sets only.

If the window is subject to the third type of restriction, it will look different to the standard version since it will contain either the assignment region or the assignment set region, but not both.

Attachments

You can add attachments to a large number of HRMS records. Examples of attachments are word processed documents, Web pages or video images.

Information Access

Does Oracle HRMS provide flexible access to information?

The information held in Oracle HRMS is an extremely valuable resource for your enterprise. You can use the same information in a variety of different ways depending on your business purpose. For example, you can use Oracle HRMS information in support of each of the following business activities:

- Performing a full range of HR functions on a day-to-day basis

- Reporting on HR activities
- Performing what-if exercises to determine the viability of alternatives scenarios
- Performing strategic planning with the Business Intelligence System

How can you use Oracle HRMS to support typical HR activities?

You can extract details about a single employee or a group of employees. Particular examples are:

- Selecting an employee or a set of employees for HR processing
- Extracting HRMS information to produce standard letters
- Viewing organization hierarchies and position hierarchies
- Viewing a historical record of previous changes

What range of reporting options are available in Oracle HRMS?

When you are reporting on activities using HRMS you may want to use each of the following reporting options depending on your business purpose:

- Define a report using parameters that you supply
- Run a predefined report
- Specify the intervals at which a report should run
- Combine several reports into a set so that they can be run at the same time
- Run a predefined Discoverer workbook.
- Create a Discoverer workbook based on the predefined End User Layer.

Can you pose "what-if" scenarios?

There will be occasions when you want to see the effect of a proposed change before deciding whether to implement it. For example, you may want to calculate the effect of a salary change for a range of employees. In these circumstances it would not be appropriate to change the data in HRMS until you have assessed the implications. Oracle HRMS allows you to transfer a copy of current data to your desktop so that you can test a succession of modifications before uploading the data to HRMS.

Can you use Oracle HRMS information for strategic planning?

Using the Business Intelligence System you can:

- Establish a set of Key Performance Indicators to provide measures of compliance for each of your business activities
- Produce reports to illustrate trends and identify future business strategy
- Make integrated use of individual reporting tools to solve complex enquiries

Can you run multilingual reports?

Yes, you can run HRMS in more than one language on a single database. This means that you can enter and report on information using more than one language. For example, your base, or source, language could be French, but you could also install German and English. You would then be able to enter and produce reports in German and English.

Administering Workforce Intelligence

Discoverer Workbooks and End User Layer

HRMS uses Oracle Discoverer to create workbooks containing worksheet reports and graphs. You can amend these workbooks to meet your enterprise's specific requirements. You can also use Discoverer User to create your own workbooks, based on the supplied Discoverer End User Layer (EUL).

You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*

Discoverer Workbooks

Each workbook holds a set of related worksheets. A worksheet is simply a report that returns data from a SQL query. The workbook may contain calculations and conditions that can restrict the report in various ways.

You can access Discoverer workbooks from the Self-Service menu. You can use parameters to specify the data range you want in your report. The worksheets are displayed in Discoverer Viewer.

Discoverer End User Layer

The end user layer (EUL) comprises a set of business areas, containing folders. The folders contain items that map to table columns. The folders can map to one or more database table. The folders present that data in a structure that is suitable for reporting.

There are two types of business areas: administrative and functional. The administrative business areas contain all folders. The purpose of the administrative areas is to give report developers access to all the folders to enable them to create ad hoc reports.

The functional business areas contain folders that support reporting for a specific business function, such as iRecruitment. Folders can exist in one or more functional business area. Workbooks are typically based on folders from one functional business area. You can grant users access to one or more functional business area, depending on which reports they require.

Person Information Workbook

Special Person Information Workbook

This workbook enables you to analyze and display personal and technical information. You can also use the workbook to view any special information, such as competence or disciplinary records for employees.

Business Questions

What are the competence levels of employees in the organization?

Are there any employees with any disciplinary actions against them?

Are there any employees who are actively involved in politics?

Are there any meritorious and talented employees in the organization?

Worksheets

This workbook has the following worksheets:

- Personal File Details
- Political Information
- Rewards and Punishment
- Technical Post Details

Personal File Details

This worksheet enables you to display and track a person's file details. For a person, you can examine:

- File number
- Archive format
- Transfer dates
- Source and target units of the file
- Store location information

Political Information

This worksheet enables you to display and track a person's political information:

- Party type and status
- Introducers
- Place, unit, and date of joining
- Formal membership date
- Date, type of exception, and reason of exception

Rewards and Punishments

This worksheet enables you to display a person's competence and disciplinary records. You can examine:

- Type and name of the reward or punishment
- Reason for receiving
- Person or authority who granted or cancelled
- Time granted or cancelled

Technical Post Details

This worksheet enables you to display a person's technical post details. You can track:

- Technical title and level
- Granting authority and date
- Expiration date

Business Question?

To what has an employee been assigned?

Extra Person Information Workbook

This workbook enables you to display foreign travel information and military information.

Business Questions

Are there any employees with previous military experience?

Are there any employees who have travelled abroad on official assignments and, if so, what are the details for these employees?

Worksheets

This workbook has the following worksheets:

- Previous Military Service
- Foreign Travel Master Info
- Foreign Travel Detail Info

Previous Military Service

This worksheet enables you to display previous military information. You can examine:

- Place and date of joining
- Approval date and unit for leaving
- Positions held
- Professional information, such as title and salary grade

Foreign Travel Detail Information

This worksheet enables you to display foreign travel information for an employee:

- Date and purpose of travel
- Designation unit name, group or team name, and team role
- Unit of funding and approval for travel

Foreign Travel Master Information

This worksheet enables you to display and track foreign travel master information:

- Departure date
- Destination and country description

- Visa number

Workforce Intelligence for Payroll Statutory Deductions and Reporting

HRMS - Payslip Archive Workbook

You can view balances and elements using the Payslip Archive Workbook.

Business Question

What archived elements and balances appear on a payslip.

Worksheets

This workbook has the following worksheets:

Elements

Balances

Parameters

You must specify the following parameters:

- Start Date
- End Date

The report includes the archived elements and balances on the selected start and end date.

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Additional Implementation Steps

Additional Implementation Steps for China

If you are implementing Oracle Payroll for China, you must complete the following additional implementation steps.

Please see the following implementation sections in Implementing Oracle HRMS for all other implementation steps that are not specific to China.

See: Enterprise and Workforce Management, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Payroll Process Management, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Compensation, Benefits and Payroll, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Workforce Sourcing and Deployment, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 1: Define Corporate and Employer Information *Required Step*

Define an organization in your organization hierarchy as a corporate and an employer. If your organization hierarchy does not contain an organization with corporate information or employer information , you cannot define an organization with employer information using the Employer Information window. Only organizations with employer information are displayed in the Employer field of the Statutory Info window.

See: Entering Employer Information, page 1-40

See: Entering Corporate Information, page 1-41

Step 2: Set up contribution areas and rates *Required Step*

Set up contribution rates for workers and employers before processing the pre-tax statutory deductions. To process Public Housing Fund and Social Insurances

deductions, you must set up the contribution areas and rates.

See: Business Group: Setting Up Contribution Area Rates, page 4-12

See: Setting Up Public Housing Fund and Social Insurance Deductions, page 4-8

See: Entering and Maintaining Public Housing Fund, Social Insurance and Enterprise Annuity Information using HTML Pages, page 4-6

Step 3: Set Up Contribution Base Rules *Required Step*

Set up the method of calculating the contribution base for a contribution area and organization.

See: Setting Up Contribution Base Rules, page 4-13

See: Entering and Maintaining Public Housing Fund, Social Insurance and Enterprise Annuity Information using HTML Pages, page 4-6

Step 4: Set Up Termination and Severance Payments *Optional Step*

Before you make a termination or a severance payment, you must set up the termination and severance elements and plans. You can process termination payments using elements within particular element classifications.

See: Setting Up Termination Payments, page 4-25

See: Setting Up Severance Payments, page 4-26

Step 5: Set up Special Payments Methods *Required Step*

You can create input values, balance feeds, formulas, and formula results for processing Special Payments

See: Entering Special Pay Tax Method, page 1-36

See: Setting Up Special Payments Taxation Element, page 4-7

Step 6: Set Up Enterprise Annuity deductions *Required Step*

To enable employees and employers to contribute towards Enterprise Annuity, you must set up the Enterprise Annuity deduction rates before processing these post-tax deductions. Contributions due from both employer and employee are calculated using a percentage or fixed rate.

See: Setting up Values for the China Enterprise Annuity Contribution Rate User Table, page 4-10

See: Setting Up Enterprise Annuity Deductions, page 4-9

Step 7: Set Up Income Tax Information *Required Step*

Set up income tax information to calculate an employee's individual income tax and deduct the appropriate sums from an employee earnings.

See: Setting Up Income Tax for Employees in Specific Industries., page 4-15

Step 8: Set Up Proration and RetroPay *Optional Step*

Set up the proration and RetroPay information to process these payments correctly.

See: Setting Up Proration or Retro-Notification, *Oracle HRMS Compensation and Benefits Management Guide*

Step 9: Set Up RetroPay and RetroPay Notification Report *Optional Step*

Set up the retro-notification and retropay information to process backdated payments and corrections.

See: Setting up RetroNotification Report, page 4-45

Step 10: Set Up Statement of Earnings *Optional Step*

Set up the online statement of earnings before you can see the values correctly.

See: Setting Up The Statement of Earnings, page 3-2

When entering SOE information at the Business Group level, select the predefined element sets CN_SOE_EARNINGS_ELEMENTS and CN_SOE_DEDUCTIONS_ELEMENTS and the predefined balance attribute CN_SOE_BALANCE_ATTRIBUTES.

Step 11: Set Up Discoverer Reports *Optional Step*

To enable you to view data in the HRMS Discoverer business areas and workbooks for China, you must set up the Discoverer functionality so that the reports reflect changes in your enterprise data. You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*

See: Workforce Intelligence, page 6-8

Step 12: Set Up China Accounting Software Interface Information *Required Step*

Set up the China Accounting Software Interface to enable the entities to file their financial and accounting information in XML format.

See: Setting Up for Exporting Payroll Information for China Accounting Software Data Interface Standard, page 4-27

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